

WHITE PAPER

4 Benefits of Salesforce for Private Equity

There Are Common Misconceptions About Salesforce for PE / VC

Firms find the platform intimidating to work with because of the robust features it offers out-of-the-box. However, that flexibility and level of optionality are reasons why Salesforce is the world's #1 CRM according to the International Data Corporation (IDC) for the seventh consecutive year.

01

Best-In-Class
Security

02

Frequent Product
Releases

03

Intelligence Through
Integrations

04

Easy-To-Use and
Frequently Standard

1: Best-In-Class Security

The funny thing about the software world we work in today is that we rarely think about technology reliability and infrastructure security. We log in and expect programs to work instantly. But the reality is that a lot of sophisticated engineering goes into building applications that keep your proprietary information secure from external threats.

As the market leader, Salesforce employs the world's top product engineers and information security experts to build and maintain the product we take for granted on the front-end. The fact that you have access to your data anytime, from anywhere without service outages, is an astonishing feat.

The application security built into the product is rarely considered but is perhaps the most critical differentiator for private equity firms today. Think about the consequences of the possibility that a hacker might be able to gain access to your organization's proprietary information. Information such as customer and prospect data and intellectual property can all mean a significant loss of competitive advantage and revenue for any firm.

Forward-thinking firms understand there are many benefits to running their firm on a Salesforce-based platform. Here are four reasons why top-tier private equity firms continue to choose Salesforce to power their tech stack.

2: Frequent Product Releases

Three times a year, Salesforce releases a new edition of its software, and in between these major releases, is constantly updating code with features and functionality that matter most to its users.


For Altvia's clients, this means that we're continually applying these new and improved tools to the specific and unique needs of both Private Equity and Venture Capital. After each major release, we also pull together the key insights to offer training and walkthroughs to our clients about how these new features make the Altvia product even easier to use.

3: Intelligence Through Integrations

Salesforce is built to combine the data that you need to differentiate your decision-making through add-ons and integrations with a wide variety of sources. Salesforce is the quintessential **single source of truth** or central data hub. Clients get robust reporting and dashboard features in Salesforce that allow them to pull data and trends simply and consistently. Integrations allow for deep insights to make sound, data-based decisions while limiting manual entry and speeding up time-to-insight.

Additionally, many products integrate seamlessly with Salesforce because of the power of the user base -- over a million -- on the platform. Meanwhile, other private equity CRMs must convince those companies to partner with them. The result is far less choice and functionality for their clients.

4: Easy-To-Use and Frequently Standard



Because Salesforce has been powering organizations for many years, it's hard to run into someone who hasn't used Salesforce in some capacity before. There are more Salesforce power users than any other CRM available on the market. As firms hire system administrators, it is much easier to find someone who knows how to use Salesforce over any other CRM.

Also, people are typically more willing to work with Salesforce than other CRM platforms. They know that Salesforce experience is a marketable skill for their ongoing professional development. They also know that there are far more resources available to them to learn how to use Salesforce. There are millions of articles, guides, videos, etc. documenting how to do just about anything in Salesforce.

Salesforce: Limitless Growth

Salesforce hosts live and virtual meetings and conferences on an ongoing basis. Users and vendors can learn about the newest features and functions and how to best leverage them in their organizations. The resources available for other CRM systems pale in comparison to what is available for Salesforce.

Don't get caught up in overlooking the incredible benefits of Salesforce because it seems a bit intimidating for capital markets. That's why Altvia exists. We take the strong foundational platform of Salesforce and combine it with our decades of experience to provide the right mixture of bespoke and out-of-the-box.