

Global Private Equity and Private Credit Firm Leverages Nasdaq eVestment Market Lens API for Fundraising Edge.

Over a 30+ year track record, the firm has used data to identify consumer trends and growth categories for investment decisions. Now it's applying the same data discipline to Investor Relations.

As the largest private firm in its space, this data-first manager sees immediate power in having a map of LP + Consultant + Manager relationships, plus longer-term opportunities to equip firm partners with actionable intelligence in their everyday workspace.

It starts with data integrity

Too often, the power of advanced data initiatives is slow to be realized because they're approached as technical challenges instead of business imperatives. This firm, by contrast, is accelerating time-to-value in its API implementation by building on a solid understanding of Market Lens data – how it's sourced, how it's structured, and how it's connected.

"We already have third-party APIs in place for market sizing and other applications, so the technicalities of implementing an API are not a big lift for us. The driver for us has always been the integrity of Market Lens data. And frankly, we've just not seen better data on the US public plan market, which is an important focus area for us. So starting with confidence in the data, we're looking for innovative ways to mine it more effectively and distribute the resulting insights more efficiently."

\$30+B

FIRM AUM

Building on strengths: A mature CRM

One reason this firm has been able to move fast with concept designs for data integration is the maturity of its Salesforce environment. Investor Relations has built out a CRM fully adopted by the fundraising team, resulting in an “everyday workspace” that can be enriched with deeper data from multiple sources. When firms don’t have the strong foundation of a well adopted CRM or BI platform, they struggle with the typical problems stemming from decentralized competitive intelligence, such as competing sources of the truth and separate information silos that restrict access to data that could be valuable more broadly.

The firm’s Salesforce environment is mature in another sense too. It’s already been enriched with an API from a data-room provider, giving end-users the experience of consulting intelligence from multiple sources in one workspace.

Crawl, walk, run

“In our experience, phased implementations make the most sense. We want our fundraising team experiencing value as soon as possible, not waiting until we implement the full richness of Market Lens.”

The firm is starting with a select tranche of LPs, then pulling their profiles from Market Lens, including asset allocations, key contacts and, critically, manager rosters. This intelligence enriches the account data already in the firm’s CRM, giving the fundraising team a more dimensional view of the prospect pool. It also accelerates implementation. By starting with a defined set of prospects instead of pulling in every investor profile from Market Lens, the team can work quickly to reconcile entity names across Salesforce and Nasdaq eVestment firm tables.

In future phases, the team plans to leverage the bi-directionality of Market Lens relationship data: Not just starting with LPs to see who they’re currently invested with, but also starting with competing managers to back into their client lists.

The team additionally envisions a self-service future that eliminates the need for meeting memos prepared in advance for partners. Instead, partners will log onto Salesforce and see, in their dashboard, critical intelligence on the LP or consultant they’re meeting. And in the case of consultant meetings, the team even foresees pulling in manager ratings and recommendations, so partners have direct line-of-sight into the consultant’s house view on private equity and credit.

Stable, dependable partners

“Our in-house team is very confident with data and experienced in API implementations, but it’s been helpful to have a capable team of engineers on the Nasdaq eVestment side. They share best practices that are helping us hone our fundraising edge.”