Backstop

ION ANALYTICS

Solution Brief

Private Equity, Venture Capital & Real Estate

The Backstop Productivity Suite provides the flexibility necessary to support multiple investment methodologies, while leveraging multiple structured data points to drive optimized business decisions

The challenge

Private Equity firms have created a modern business model that straddles all industries and geographies. Victims of their own success, PE companies must now work harder at finding attractive acquisitions, as well as executing operational strategies in order to produce favorable ROI.

Additionally, the regulatory landscape and ever more sophisticated investor demands have elevated the need for superior data management. Dated infrastructure and rigid legacy systems are incapable of providing the timely insight required by world-class PE firms.

Our solutions

Backstop is a powerful, easy to use platform incorporating all the tools necessary to support today's Private Equity office. Backstop's clients possess the tools they need to manage investors, fundraising, deal tracking, portfolio monitoring, and reporting — all in the same suite. A purpose-built industry solution that can calculate PME on the fly, generate and distribute investor notices via email or branded portal, send alerts when exceptions occur, and provide integrations with many of the industries existing tools and data sources. For maximum flexibility, Backstop allows for a phased approach bringing additional functionality online as needed.

Challenges

- Deal teams must work harder to chase attractive acquisitions
- LPs are demanding increased transparency
- Legacy technologies and outmoded data silos are incapable of providing the timely insight required by world-class private equity firms

Proven results

- Manage investors, fundraising, deal tracking, portfolio monitoring, and reporting from the same platform
- Leverage superior data management with information at the fingertips to provide world-class investor servicing
- Fuel fundraising efforts with easy tracking and maintenance of capital pipelines, using tools purpose-built for private equity

> "Backstop has been a great solution for our firm, and working with Backstop has been a great experience since the very beginning."
>
> Jono Swanson, Sr. VP, Fund Management at Carmel Partners

Investor relations

Backstop's sophisticated investor relationship management tools allow fund managers to consolidate all of their LP's qualitative and quantitative data into one centralized database

- Track LP balances, along with commitments and percent unfunded, at both the individual and fund level
- Analyze LP and fund performance metrics, such as IRR, multiples, and PME's
- Create and distribute personalized call notices and statements

Capital-raising

Backstop's fundraising capabilities allow for easy tracking and maintenance of capital pipelines and associated activities during the capital-raising cycle.

- Manage interest levels, investor types and investment probabilities with a sales tool designed specifically for fund managers
- Build email distribution lists and send unlimited e-mail blasts with watermarked attachments
- Save time and energy while scheduling road shows by using Backstop's trip planning features
- Easily create and share pipeline reports to measure sales effectiveness
- Gain self-service real-time insights into capital pipelines with Capital-Raising Dashboards

Client relationship management

Backstop's powerful CRM creates the perfect foundation for tracking all contacts and related interactions.

- Track and share notes, meetings, calls and documents pertaining to limited partners and portfolio companies
- Sync emails, contacts and calendars with Backstop's Outlook® integration
- Gain a better understanding of a network's interconnectivity by linking contacts through relationships
- Get visibility into all the efforts you and your team bring to the firm with Home Base
- Build activity reports and lists by location, relationship strength or other attributes

Client portal

The Backstop Portal provides a secure and branded outlet for investor documents distribution, prospect marketing and deal rooms. Additionally, the portal's technology is capable of adjusting the portal layout for maximum utility on mobile devices.

Importantly, the Backstop Portal is securely and tightly integrated with the Backstop CRM, Research, and Portfolio Management services.

- Track downloads of materials to gain insight into relevancy and business drivers
- Securely distribute fund documents to LPs, investors, and clients
- Post fund performance and benchmarks and provide insight into investment research and due diligence
- Monitor document downloads and page views for full compliance reporting

Portfolio management

Backstop is the ultimate portfolio management software solution that enables tracking and monitoring investments. It provides a centralized model management process that enables new financial models to be introduced or updated in a timely and efficient manner.

- Quickly evaluate your portfolio across any relevant attribute or against provided benchmarks
- Use the provided dashboards to understand risk exposure, IRRs, multiples and more
- Gain detailed visibility into outstanding commitments and upcoming capital requirements

From the introduction of a potential acquisition, through the entire investment lifecycle, Backstop supports the complete process.

Asset monitoring

From the introduction of a potential acquisition, through the entire investment lifecycle, Backstop supports the complete process.

- Leverage Backstop Portal to create deal rooms unique to the opportunity
- Monitor and report on the internal due diligence process
- Create asset tear sheets for consideration by the investment committee or to utilize in quarterly reporting
- Use customizable transactions to maintain valuations as well as cost basis, return of capital and capital gain records, while the platform maintains the latest performance calculations
- All asset-related documents (e.g. leases, inspections, contracts, loan docs) can live in the system and be easily tagged and retrieved

World-class implementation, support & knowledge management

Support at Backstop is more than a call center. Our expert in-house team works hard to build relationships with our clients, enabling us to grow with your needs and aid you in meeting your business goals. Product training begins at implementation, when new users are assigned a Backstop Project Manager who will serve as your team's primary contact and guide you through all phases of implementation, assisting with any questions you have throughout the implementation process. In addition, you'll receive a relationship manager, access to our knowledge management team, and much more.

- Industry-specific expertise
- Free training
- Focus on client success
- Community development – annual user conference Backstop Beyond

About Backstop Solutions

ION Analytics, a leader in services, data, and predictive capabilities for global capital markets, acquired Backstop in late 2021 with a shared desire to help clients break down the barriers to data access and deliver better decisions. As part of ION Analytics, our industry-leading services redefine the way firms operate in private markets, reshaping the institutional investment industry at the intersection of human insight and machine intelligence. Our core strength lies in developing technology that serves as a definitive source of truth, empowering you with actionable insights, and seamless institutional knowledge sharing, while optimizing day-to-day success.

T6912