

**Subject Line:** CRM for Portfolio Companies

Hey there,

The relationship between portfolio companies and their private equity investors is symbiotic. You're looking for a positive return on investment and they're looking to you for best practices and tools to help them grow to their full potential.

Customer Relationship Management (CRM) software helps them organize their customer data, grow revenue, and improve customer retention. Customer data that used to be scattered across spreadsheets and disparate tools is now in one place – making it easier to make informed business decisions and streamline reports back to you.

[Salesforce CRM](#) and [Microsoft Dynamics CRM](#) are cloud-based solutions that can be easy to implement and adopt with the right consultants that can right-size them for your portfolio company. They help your PortCo teams track their sales pipeline and automate follow-up tasks to save time.

beiNVENTiV can help your PortCos design, implement, and maintain these CRMs. [Contact Us](#) to discuss if one of these CRMs are a good fit for your company or if you own one today and need help getting the most out of it you can.

Best regards,

**Jeff Fantalis, CEO**

beiNVENTiV Private Equity Practice

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