

HOW BRIDGE IMPROVED DEAL TRACKING AND TEAM EFFICIENCY WITH DEALPATH

Bridge Investment Group is a privately-held real estate investment management firm with \$20.2B in assets under management. Bridge combines its 4,000+ person, nationwide operating platform with specialized teams of investment professionals focused on select U.S. real estate verticals.

THE CHALLENGE

After a period of expansion, Bridge Investment Group realized that the portfolio tracking they had once handled with a few Excel sheets was now incredibly cumbersome, taking up vital time and effort for their analysts. Bridge Investment Group recognized that they needed a cloud-based tech solution to improve efficiency and streamline analysts' workflows—especially as the team continued to grow.

THE SOLUTION

As Bridge Investment Group began their search for a tech solution they quickly noticed that most other platforms didn't have the robust task management, mapping or sales tracking that they needed. However, the Dealpath platform had a comprehensive set of features that addressed Bridge's need for improved deal management and data centralization—in addition to the ability for multiple teams to work together in one platform.

THE RESULTS

With Dealpath, Bridge Investment Group was able to improve collaboration, increase efficiency, and track internal and external communication related to all their existing deals. Bridge no longer has to go through multiple Excel sheets or Outlook emails to find deal information—it's all in Dealpath and can be easily accessed and reviewed. Word on the benefits of Dealpath quickly spread across the organization, with multiple verticals at Bridge Investment Group now implementing the software to maximize efficiency for their teams.

“ We explored several deal tracking solutions but nothing else came close to what Dealpath has delivered. The robust platform and ability to customize to our needs has significantly increased collaboration and efficiency within our teams. It's truly made our lives so much easier. ”

Holden Latimer,
VP of Acquisitions, Asset Management, & Dispositions

