DEALPATH IMPLEMENTATION GOALS

PROVIDE TAILORED SOLUTION

- Understand your processes and pain points
- Design the most suitable implementation plan tailored to your firm's needs and workflows

REQUIRE MINIMAL CUSTOMER EFFORT

- Import any (or all) historical deals data
- Complete the majority of platform configurations
- Help with additional setup and trainings

IMPART SCALABLE BEST PRACTICES

- Provide technical consultation and industry best practices
- Craft and lead unique trainings for your platform and users

**Customer Time Commitment During Implementation:
1 Hour/Meeting + 2 Hours/Week/Project Team Member**

ABOUT OUR CUSTOMER SUCCESS

Real Estate & Tech Experiences/Member
7+ YEARS

Avg Implementation Time:
68 DAYS

Avg Customer NPS:
62

Avg Support Response Time:
2 HOURS

Support:
DEDICATED IN-HOUSE TEAM BASED IN THE U.S.

YOUR IMPLEMTENTATION RESOURCES

Implementation Manager (IM)
- Main point of contact during implementation
- Works directly with your project team to understand your needs

Implementation Analyst (IA)
- Configuration guru and data expert
- Works with the IM to set up your platform

Customer Success Manager (CSM)
- Dedicated point of contact during training, go-live, and post-implementation
- Regularly informs product updates and assists with new configuration requests

PREPARATION CHECKLIST

☐ Select a project team who understands your processes and can communicate executives' vision

☐ Prepare actively used documents, such as:
  - ☐ Due diligence checklist(s)
  - ☐ Spreadsheet of past and existing deals
  - ☐ Reports and templates you currently compile and distribute

☐ List of specific deal workflows and terminology

CUSTOMER PROJECT TEAM

☐ Project Lead: Coordinate project meetings and deliverables

☐ Executive Decision Maker: Provide input and sign off on deal workflows, and provide requirements on executive-level reporting

☐ Business User(s): Provide deal data and workflow requirements

☐ IT Contact: Assist in single sign-on (SSO)/ API configuration

TIMELINE & MILESTONES

Kick-off

est. 1 week

- Review current process
- Establish success criteria
- Review implementation process & timeline
- Create custom Dealpath instance

System Overview

Walk through your Dealpath instance with initial configurations and deal execution/ collaboration workflows based on your data and process.

est. 4 - 6 weeks

Configuration Period

Dealpath Implementation Manager works with project lead(s) to iterate on the initial configurations over a few weeks, depending on the scope and complexity.

Training Prep

Finalize all configurations and execute final pre-training walk through with project team.

est. 1 week

Team Training

Train all end-users on Dealpath functionally and the firm's internal best practices.

est. 1 week

GO LIVE

Live System

Dealpath Customer Success Manager will continue to support your team with:
- Product updates
- Tips & best practices
- Additional setup and training needs
- General Q&A support

ongoing support

"Dealpath has transformed our ability to cultivate, capture, organize, and analyze transactional data across all of our markets. Dealpath has become integral to our business."

**DAVE WELK,
MANAGING DIRECTOR OF ACQUISITIONS
AT ORIGIN INVESTMENTS**

"This has been the simplest adoption, use, and engagement of any software I've been affiliated with."

**PATRICK KENNEDY,
HEAD OF PRODUCT, CRE LENDING
AT AMHERST HOLDINGS**

"Dealpath makes change management feel easy, it's a real testament to their partnership. Dealpath was able to elicit a level of confidence in our professionals – it's really quite remarkable."

**TIM KORUNA, DATA PROJECT MANAGER AT
WHITE OAK PARTNERS**

Blackstone AEW BRIDGE INVESTMENT GROUP ROCKPOINT GROUP

UBS OXFORD MILL CREEK RESIDENTIAL FOUR CORNERS PROPERTY TRUST

Manulife els Equity LifeStyle Properties L+M ARTEMIS REAL ESTATE PARTNERS

Dealpath is the real estate industry's leading cloud-based deal management platform. Investment and development firms leverage Dealpath as their command center for smart pipeline tracking, powerful deal analytics, and collaborative workflows. Founded in 2014, Dealpath now supports over $5 trillion in transactions globally with leading institutions across the world.

DEALPATH