



# Dealpath Implementation Guide

---

Goal-Oriented Configuration to Achieve  
Your Workflows & Processes



DEALPATH



The Dealpath implementation process is designed to provide you with the platform that best fits your firm, fully configured to your internal processes, workflows and data sources. After your firm completes implementation, the deal team will be managing their pipeline and workflows out of the live platform, including simplified access to real-time and historical data.



# 1

## Implementation Goals Taking Your Process to the Cloud

Dealpath's goal is to streamline your processes and workflows through a centralized platform where all your data is stored, updated and accessible in real time, giving your team the tools to collaborate without friction.

The hands-on approach ensures that you'll go live with a robust tool that's fully configured to your internal processes and preferences.

### **Tailored Solution:**

Based on your internal processes and defined goals, you'll receive a suitable implementation plan.

### **Dealpath-Led Configuration Process:**

The Dealpath implementation team will import historical deal data, configure your platform, and assist with additional setup or training.

### **Company-Specific Training & Launch:**

After the configuration is complete, the Dealpath team will lead guided training sessions to ensure a smooth onboarding process.



**The hands-on approach ensures that you'll go live with a robust tool that's fully configured to your internal processes and preferences."**

# 2

## Your Team's Involvement & Time Commitment During Implementation

Dealpath handles the heavy lifting of configuring your platform for a seamless transition. To ensure we're meeting your desired specifications and capabilities, we request weekly involvement from select members of your team who will become Dealpath power users.

By actively participating in the implementation, your team ensures that the fully configured solution will add real value during the day-to-day investment process.

### The Customer Project Team

For a smooth and successful implementation, the Dealpath team needs to develop a thorough understanding of how your process works. To achieve this, we request that all firms establish a Project Team with the following roles:

#### **Project Lead**

*The main point of contact for your firm*

The project lead will be your firm's main point of contact, working with the implementation manager to coordinate project meetings and execute on deliverables. To create the best platform for your team, project leads must be knowledgeable about processes and goals, and have the ability to engage with stakeholders for feedback.

# 2

## Your Team's Involvement & Time Commitment During Implementation

### **Executive Decision Maker**

*The key stakeholder at your firm*

The executive decision maker will be your leadership team's voice in the process, setting standards for workflows, executive-level reporting, and signing off on the final product.

### **Business User(s)**

*The main user or users of Dealpath*

The business user (or users) will provide the implementation team with deal data and workflow requirements based on their team's specifications, while also giving input about configurations. To ensure the platform meets the full organization's needs, firms with multiple teams should include one business user from each team on the project team.

### **IT Contact**

*The technical stakeholder at your firm*

The IT contact will help the Dealpath implementation team throughout the process by assisting with single sign-on (SSO), API configuration, and other technical tasks bridging Dealpath with your firm.

Together, the project team will ensure the Dealpath team delivers the desired functionality.

# 2

## Your Team's Involvement & Time Commitment During Implementation

### Customer Time Commitment During Implementation

**Weekly Commitment:** 1-2 Hours/Meeting + 2-4 Hours/Week/Project Team Member

**Average Implementation Time:** 12 weeks

**Net Promoter Score:** 70 | SaaS Industry Average NPS: 30\*

**Average Support Response Time:** 3 Business Hours

**Total Successful Implementations:** 300+

\*SaaS industry average Net Promoter Score according to a [Retently Study](#)



“

Our dedicated, in-house support team is here to respond to questions and ensure your team is empowered to succeed with Dealpath.

# 2

## Your Team's Involvement & Time Commitment During Implementation

### Preparation Checklist

What can you do to maximize the impact of your firm's Dealpath implementation?

- Select a project team who understands your processes and can communicate executives' vision
- Provide a list of specific deal workflows and align on internal terminology
- Prepare actively used documents, reports and templates, such as:
  - Due diligence checklist(s)
  - Spreadsheet of past and existing deals (pipeline)
  - Examples of financial models currently in use
  - Deal summaries
  - Investment committee memos
  - Comp reports
  - Dead deal reports



# 3

## Dealpath's Implementation Team

Without guidance, implementing and onboarding new technology can be burdensome. You'll have a dedicated Dealpath implementation expert who is well-versed in standardizing real estate processes based on unique workflows, ensuring you receive the support and direction you deserve.

### **Implementation Manager (IM)**

*Your main point of contact throughout the implementation process*

Your Implementation Manager will spearhead the implementation process, working directly with the project team to understand your business workflows and configure the platform to meet your needs.

### **Customer Success Manager (CSM)**

*Your main post-implementation point of contact for questions, updates, support and other issues*

Your Customer Success Manager will be your dedicated point of contact after the implementation process to answer questions, provide product updates, and assist with ongoing configuration.

# 4

## Understanding Your Current Process

Dealpath's goal is to add scalability and visibility to your current process, not replace it. The first step of implementing Dealpath will be to understand your existing process to identify needs and areas of opportunity.

- Pipeline
- Due Diligence / Deal Execution Checklists
- File Sharing/Storage
- Modeling

“

Dealpath's goal is to add scalability and visibility to your current process, not replace it.

”



# 5

## Dealpath Implementation Timeline

From Kick-Off to Go-Live, the Dealpath team will be here to support you.

### **Kick Off: Week 1**

The Dealpath team will work with your project team to understand your processes, align on expectations, and determine what a successful configuration will look like.

- Review current process
- Establish success criteria
- Create custom Dealpath instance

### **System Overview: Week 2-3**

The Dealpath team will begin the configuration process based on your data, collaboration workflows and processes. Then, they'll review the setup with you directly in Dealpath.

- Build custom deal types and workflows
- Build custom info fields/views to house deal data across deal types
- Create standardized deal execution and due diligence checklist templates across deal types
- Import initial subset of deal data for testing purposes

### **Configuration Period: Week 4-9**

With the initial configuration in place, both teams will work together to iterate on and optimize your unique instance.

- Iterate on and tweak newly established workflows and processes while finalizing system overview
- Standardize dashboards and reporting
- Configure platform access and security based on users and teams
- Configure model mapping

# 5

## Dealpath Implementation Timeline

### Final System Testing: Week 10-11

Before launching, both teams will work together to finalize pre-launch platform configurations and ensure that the platform meets your goals.

- Final testing for workflows, processes and reporting
- Confirm data sourcing, tracking and management functionality aligns with your process
- Address any final requirements and requests

### Launch Kick-Off & Team Training: Week 12

Once the platform meets your requirements, the Dealpath team will launch the platform and train your team.

- Import current deal data
- Host training webinar for all users
- Host separate project team training on admin functionality

### Ongoing Education, Training and Configuration: Forever

After the platform is live, your CSM will continue to be a resource as your team needs training or your needs evolve.

- Continue learning tips and best practices, asking questions, and receiving support
- Constant communication regarding new features, platform updates and use cases
- Coordinate ongoing platform configuration updates based on additional requests

## About Dealpath

Dealpath is the industry's most trusted real estate platform, empowering hundreds of leading institutions including Blackstone, AEW and Oxford properties to easily collaborate and make predictive investment decisions based on real-time data. Streamlining the way that real estate investors source, manage and analyze data, Dealpath is the centralized command center that provides fast, simplified visibility into new deals and associated tasks, fueling strategic decisions to achieve optimal, risk-adjusted returns. To date, Dealpath has supported over \$6 trillion in transactions globally.

Founded in 2014 in San Francisco, Dealpath is the leading intelligent software for commercial real estate investment and development teams. Dealpath is led by an experienced team of industry executives and technologists who are passionate about delivering the best tools and solutions for our customers.

### Empowering hundreds of top performing firms across the globe:

Blackstone



BRIDGE  
INVESTMENT  
GROUP

Manulife

OXFORD

ROCKPOINT  
GROUP



300 California Street, Suite 200  
San Francisco, CA 94104

600 5th Avenue  
New York, NY 10020

[www.dealpath.com](http://www.dealpath.com)