



FINANCIAL SERVICES

Private Equity

MANAGE RELATIONSHIPS, DEAL FLOW, FUNDRAISING, AND REPORTING WITH THE SIMPLICITY OF THE LEADING LOW-CODE PLATFORM.

Leading private equity firms trust Appian to help them consolidate, integrate, and organize data for greater operational efficiency and transparency.

STREAMLINE PROCESSES FOR FASTER TIME-TO-REVENUE

Private equity firms dedicated to revolutionizing their operations, business models, and processes with innovative technologies have witnessed improvements in their deal-making process. They've also reported increased efficiencies in operations for their portfolio companies. Historically, this has been challenged by siloed processes, such as managing investments through separate legal entities with in-house systems, applications, and business processes.

Appian supports the agility we need to move quickly and make smart decisions in the high-speed world of global securities trading.

— Carl Stumpf, Managing Director, Technology Controller and Head of Purchasing at CME Group

END-TO-END LIFECYCLE MANAGEMENT

Private equity firms must remain client-focused across the operational value chain, from investment structuring to exit strategies. This requires a technology strategy that minimizes disconnects, supports faster deal execution, and enables greater consistency around value propositions, tax strategies, regulatory compliance, legal entity management, and sales and marketing. Automated and continuous audit trails across all related processes, activities, communication, reporting is also critically important for private equity firms.

A HOLISTIC APPROACH TO REGULATORY COMPLIANCE

To strengthen investor protection—while stabilizing markets and avoiding a repeat of the 2008 economic disaster—governments and policymakers have crafted a myriad of laws (AIFMD, UCITS V, EMIR, Basel III, Solvency II, MIFiD, Dodd-Frank Act, etc.). Private equity firms need a way to manage their programs in a compliant and affordable way.

Intelligent automation can reduce data redundancy, create greater transparency and execution control, and ensure accountability. Private equity firms can achieve this by adopting robotic process automation (RPA) and integrating it with business process management (BPM) capabilities. This enables them to improve compliance, operate more cost-efficiently, and further customer relationships at a lower cost.

THE APPIAN DIFFERENCE FOR PRIVATE EQUITY

- **Speed time-to-revenue.** Unlock employees' potential with technology that allows them to work in an efficient and controlled way.
- **Continuously improve compliance and risk management.** Empower employees to confidently and accurately take action in the moment with 360-degree visibility and effective controls.
- **Reduce costs.** Use intelligent automation to reduce manual auditing steps, create an agile and standardized workflow, and improve time-to-close business outcomes.

Explore the Appian suite of applications for Private Equity

P/E Deal Lifecycle

- Deal Initiation and Review
- Tax Optimization Coordination
- Legal Entity Management
- Deal Codes Management
- Sales Automation Marketing Management
- Deal Pipeline Management

P/E Investor Lifecycle

- New Investor On-Boarding Coordination
- FATCA / CRS Management
- AML / REP-CRIM (Source of Funds) Review Processes
- KYC Enhanced Due Diligence
- Investor Lifecycle Coordination
- Special Provisions Management and Control
- Suitability Review Management
- Allocation of Equity Control Management

P/E Fund Operations

- P/E Fund Operations
- Product Launch Coordination
- Fund Restrictions Profile Management and Control
- Fund 360° Lifecycle Hub and Transactions
- Fund Jurisdiction Review and Management
- Fund Reporting Coordination and Control (CRS / BEPS)

P/E Portfolio Operations

- Capital Calls and Distributions
- Market Data Help Desk
- Performance Review and Validation Management
- Investment Allocations Oversight Management
- Conflicts of Interest Review Management
- LP 1-Pager Management

P/E GRC & Corporate

- Robotic Workforce Manager
- Corporate Actions
- GDPR
- Employee Lifecycle Management
- Political Contribution Surveillance
- Audit Response and Resolution Management
- Data Access Management
- Risk and Control Goal Setting, Oversight, and Remediation Management
- Fraud Investigations
- Enterprise Risk Management
- Service Provider Oversight
- Employee Trade Oversight Management

APPIAN PRIVATE EQUITY FIRMS CAN:



Accelerate Outcomes



Drive Revenue Growth



Streamline Internal Operations

REPRESENTATIVE APPIAN PRIVATE EQUITY CUSTOMERS:



Learn more about Appian's capabilities for private equity: appian.com/finserv



Appian provides a low-code development platform that accelerates the creation of high-impact business applications. Many of the world's largest financial institutions use Appian applications to improve customer experience, achieve operational excellence, and simplify global risk management and compliance. For more information, visit www.appian.com/finserv