



SmartExchange integrates project management, file sharing (VDR), CRM, and visual analytics onto one platform. From initial strategy and due diligence, to integration planning, all deal processes can be consolidated into one location - creating a single source of truth. Any deal-related tasks, documents, and communication are accessible in real-time from anywhere, providing a streamlined experience for all parties involved. With SmartExchange teams can stay focused and accountable – leading to more efficient, and successful deal outcomes.

USE CASES

- Deal Strategy & Preparation-
- Target Screening-
- Due Diligence-
- Negotiations & Contracts-
- Post-Merger Integration-

- Contract Management-
- Project Management-
- Visual Analytics & Insights-
- Automated Reporting & Alerts-
- CRM-
- Virtual Data Room-
- Custom Application Builder-
- API Integration with Existing Applications-

- **Streamline Workflows**
Eliminate administrative processes that hinder efficiency and effectiveness of the deal team by centralizing all data in one location in real-time.
- **Improve Productivity**
Intuitive dashboard keep teams focused on the strategic rationale of the deal during each execution phase, helping them make more informed business decisions.
- **Enhance Transparency & Accountability**
Set due dates, assign tasks, track progress and share files. Work management all in one place helps deal teams stay organized, informed, and accountable.
- **Reduce Risk**
Custom user profiles and granular security rights keeps information secure. Reduced manual processes and administrative work helps eliminate costly human error.
- **Customized Configuration**
Integrate enterprise systems you already use to maximize their ROI. Build out your portal and dashboard to mirror your workflow.
- **Save Money**
Consolidating work management into a single source eliminates redundant processes and third party service provider costs.