Defining the Private Equity Firm of 2025 Predictions for Operational Excellence Brand positioning activity User applies criteria to source data AI-Powered **Brand Proprietary** Search Refine targeting **Market Data Analysts** criteria, search & News for add-on Proprietary intelligence User selects criteria to filter data opportunities **Proprietary Investment Targets** (Not Prioritized) Proprietary market intelligence Inbound enquiries Tools, data and networks are leveraged to prioritize resources and nurture Outreach relationships with potential targets AI-Powered Campaigns Lead Scoring **Proprietary Investment Targets** (Optimized, Prioritized, Updated) Nurtured targets Relationship **Market Data** graduate to active Intelligence pipeline when time is right CRM Refine prioritization criteria **Active Deal Pipeline** Intermediaries Proprietary relationships Refine Due Diligence Deal leveraged to **Process Due Diligence** Marketplaces facilitate unique Proactive intermediary relationship dealflow and management based on intelligent market intelligence to ensure relevant confident due diligence process deals are offered Best practices and proprietary insights are leveraged to Portco improve portfolio **Portfolio Companies Applications** management, refine due diligence and refine origination strategy Real-time data flow directly from portco applications LP Portfolio Monitoring Portfolio Market Data / High quality reporting, self Strategic **CRM** Monitoring / **Benchmarks** service data requests Execution B.I. LP Portal Advanced scenario More data, captured intelligently, planning and modeling used to power decision making. are used to maximize Strategic execution tools to achieve value creation and plan **Exits** better alignment and iterative optimal exit strategy improvement of best practices MAESTRO