

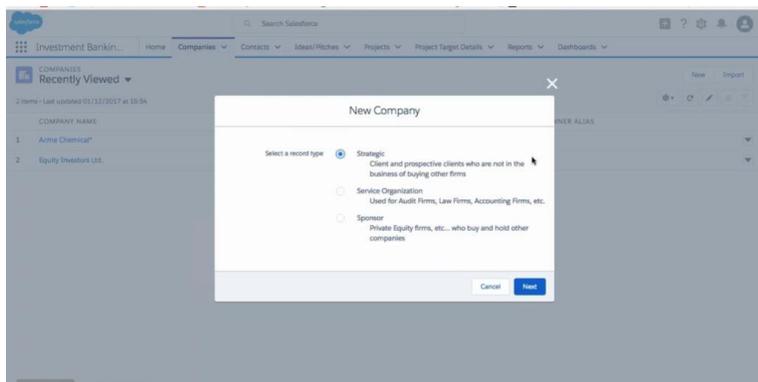
Investment Banking Template Overview

The Investment Banking Template runs on the Enterprise Edition of Salesforce and is available at no charge. It is highly recommended to have your licenses deployed with this template so that you start with this pre-built functionality. The purpose of this document is to provide you an overview of how this template is configured to meet the needs of investment banking firms.

The Account tab is the backbone of Salesforce. With this template, the standard Account tab has been renamed “Companies”. In the investment banking world, you deal with different types of companies so this template utilizes record types. Record types allow you to track different data and data relationships for different types of accounts. The three record types that are available are:

- **Service Organization** = Audit Firms, Law Firms, Accounting Firms, etc.
- **Sponsor** = Private Equity firm or others that buy and hold companies
- **Strategic** = Clients or Prospective Clients

For example, you may be interested in tracking your pitches for a strategic company but that information does not need to be tracked for service organizations. When you go to create a new company, you are presented with the following screen:



Salesforce makes it easy to segment your data so you only see the types of accounts that you want to see. As you can see on the Companies tab when you select a view called “All Strategic Companies”, you only see the Strategic Companies that are listed in your database and can sort the data by any column.

COMPANY NAME	INDUSTRY	EMPLOYEES	ANNUAL REVENUE	LAST ACTIVITY
Acme Chemical*	Construction	3,500	\$10,000,000	1/4/2017
Equity Investors Ltd.	-	-	-	-
Olympic Accounting	-	-	-	-
Johns Industrial Paints	Biotechnology	23	\$15,000,000	-
Regency Surface Protection	Biotechnology	70	\$20,000,000	-

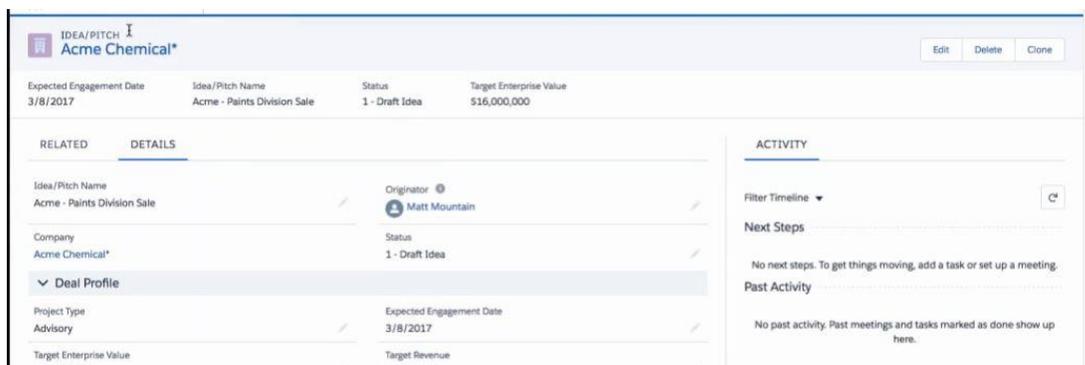
Regardless of what type of company you are on, you have the ability to track contacts. You can have multiple contacts per company. In the picture below, you can see that we are on the Acme Chemical company and have two contacts associated to that one company.



Activity Tracking – It is critical to investment banking firms to track all of their activities for all contacts, companies, pitches, projects, etc. and to share this with other members of the firm. Activities are a core function of Salesforce and are broken into two categories:

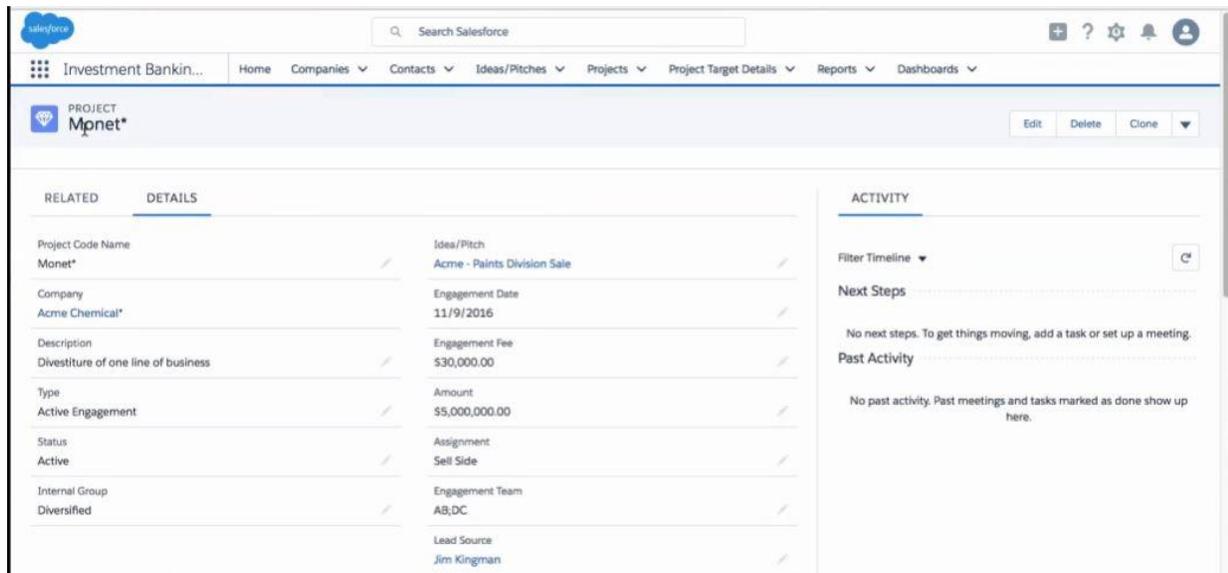
- **Tasks** - These are activities that you want to complete but are not a scheduled meeting with a scheduled day and time. They usually have a date associated with them (I need to call Jim next Tuesday) but would not show up on your calendar.
- **Events** – These are activities that show up on your calendar. These may be scheduled in Outlook or Gmail and can be synchronized with Salesforce so when they get added to Salesforce or your email system, they show up in the other system.

Ideas/Pitches – The Ideas/Pitches tab is used to track the pipeline of new projects. This tab is used to track general information about the pitch (i.e. company name, status, it is an advisory or capital raising project, etc.) as well as your activities. Because you could have multiple pitches to the same company over time, this tab allows you to see what was presented and the end result of each pitch. While the Ideas/Pitches screen comes with default fields, this tab (and all tabs) can have new fields created, existing fields hidden, page layouts changed, etc. Here is a picture of the standard Ideas/Pitches page layout.



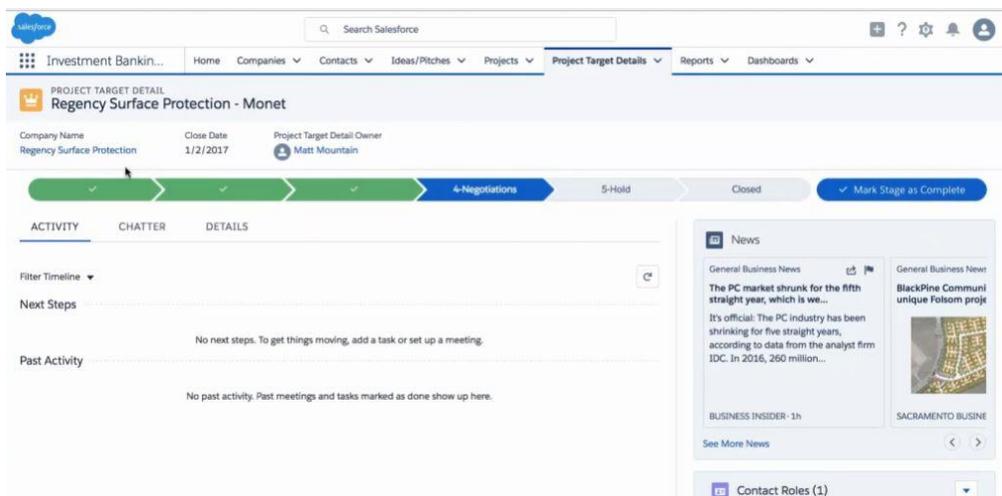
Tracking your Projects– the Projects tab allows you to track information about each project you are working on. This tab has a number of related lists that associate other records in Salesforce to the project. The following related lists are displayed below.

- **Targeted Companies** - companies being pursued for this project.
- **Fee Records** - your fees for this project
- **Due Diligence Projects**

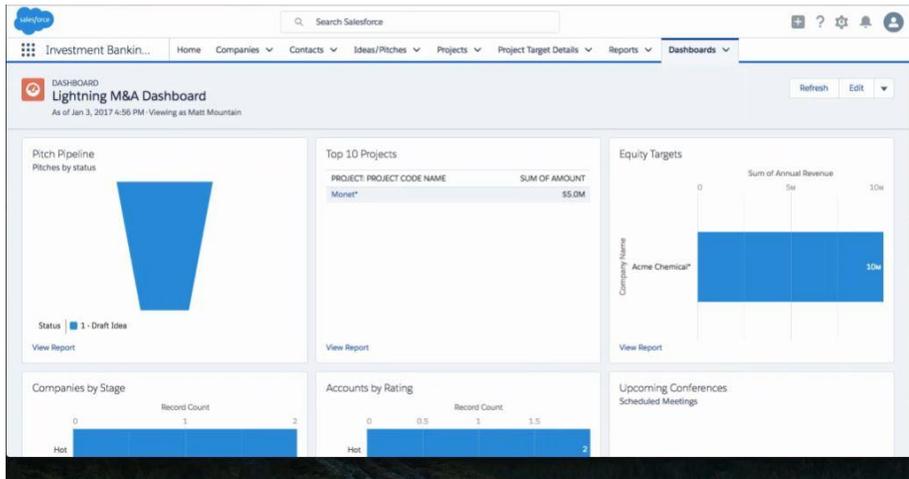


If you do not want to utilize the Fee Records and the Due Diligence Projects feature in Salesforce, we would simply remove them so they would not be visible.

Project Target Details – This tab allows you to track all of the companies that you are targeting for a specific project. In this record, you are associating each Project Target Details Record to both a Company and a Project. By doing so, you will be able to see all records that a strategic company has been targeted for as well as all Project Target Details records for a specific project. A picture of this record is below:

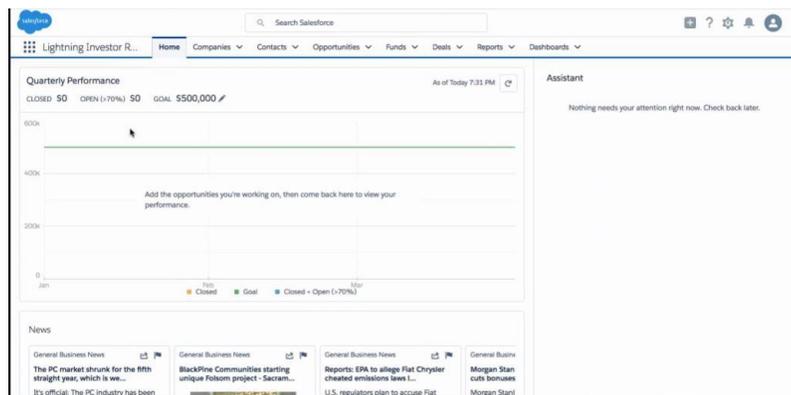


Reporting and Dashboards – Any data in Salesforce can be reported on and most organizations take advantage of both the Report and Dashboard tabs. In this template, one dashboard is pre-built. Dashboards contain standard reporting, but all of these reports can be modified to meet your needs. Additionally, if you need a new report that is not pre-built, that is something that can easily be done.



The Home Tab – the Home Tab, is where information can be centralized. All of your tasks and events (across any tab) are centralized on the home tab so it is easy to see all that needs to be done. There are also a number of pre-built views (overdue tasks, all open tasks, tasks due in next 7 days, etc.) to make it easy to see a subset of your tasks.

You also have the ability to view your collapsible sidebar (on the left side). The collapsible sidebar, which can be located on every page, contains a section called Recent Items. Instead of having to search for the record, you can simply click on that link and it takes you back to the record.



Click [HERE](#) to view a video demonstration of this template