

# Deal management for dealmakers.

Driving better returns with the right deals, the right terms, the right timing.

**The power of deal management software doesn't come merely from the efficiency gains of automated reporting and easier task tracking. Real power comes from giving you the resources, intelligence, and responsiveness to move faster than your competition and work smarter in deal sourcing, screening, and underwriting.**

**This fundamental shift in thinking is the essence of our approach at Altrio.**

First generation deal management tools focus on automating workflows and eliminating redundant tasks, but that's the easy part. To make a real difference in your investments, we believe a deal management solution must deliver intelligence, drive faster flow, and capture efficiencies where it actually matters—by making your process better and smarter with every deal done.

Early deal management solutions adapted industry-agnostic technologies like CRM and project management tools to real estate. Today, we can do better. The basics of business intelligence, pipeline tracking, CRM, and reporting are a given.

A more impactful next-generation solution must make dealmakers more effective, which requires three key components:

- ▶ **Better deal intelligence**
- ▶ **The ability to move faster**
- ▶ **Continuous process improvement**

Altrio designed our deal management solution, Origin, specifically for the demands of ambitious dealmakers. The objective was to take deal teams of all sizes to the next level by providing immediate access to the insights you need to work smarter and faster, and that drive the actions that result in better deals.



## Turn professional instinct into repeatable performance.

At Altrio, we know that a dealmaker's competitive advantage comes from what she knows that others don't -- either through experience or a network developed over a career.

But it can sometimes be difficult to translate your unique market knowledge and experience into always accessible, easily actionable deal insights. Origin includes a built-in data service that transforms everyday deal flow into your own proprietary market database. This includes:

- ▶ **Data drawn from your existing portfolio and previous decisions**
- ▶ **Data ingested from emails, memos, brochures, and other originator marketing about new deals**
- ▶ **Third-party data, including real estate market, capital market, economic and demographic information**

With faster access to your unique market knowledge, you can have deeper insights driving decision-making without the additional work of tedious data entry.

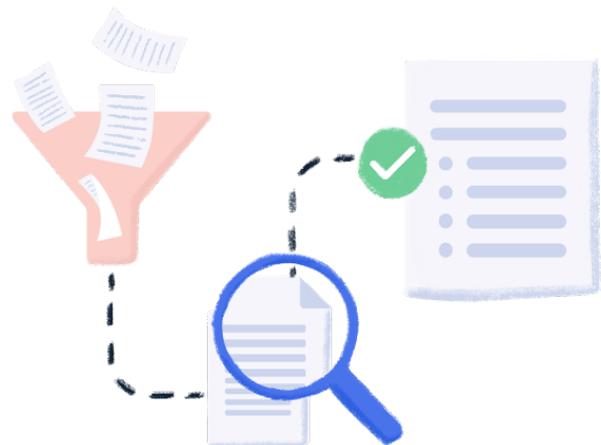
While in the past, information about an asset you previously looked at sat in an Excel sheet, in emails, or buried in a saved file somewhere, now you can pull data from all the deals that have crossed your team's desk within seconds to better assess future deals.

By mining warehoused deals for future insights, our comps database makes it easy to compare deals with similar features such as key tenants, property size, geographic location, asset type, etc. Plus, you have the power to look at opportunities from a full portfolio perspective to assess fit and broader portfolio performance. This kind of information is only effective if you can do something with it quickly. That's why we embedded access to this essential information in a process-oriented tool that makes the information you need available right when and where you need it.

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## Move faster than your competitors.

Any time you spend working on the wrong deals is keeping you from finding and closing the right ones. Faster investment decisions drive better returns. And it all begins with more efficient deal screening and underwriting. That's why Origin infuses the right data and insights into your process early on, so you can avoid wasting weeks evaluating when you should be passing immediately.



We also recognize that missing out on deals because you can't move fast enough or gain enough conviction can be just as frustrating. The ability to move quickly and confidently is often a deciding factor in whether you are able to get into the best opportunities. Losing good deals is painful, especially when market demand outweighs supply. With Origin, dealmakers have the power to quickly get the information they need to gain conviction and get behind a deal.

Being able to move fast demands a consistent deal screening process that's data-driven and continuously improving, which is the core focus of Origin. With consistent processes, you can systematize the factors that typically kill deals, remove guesswork, and stay focused on the best opportunities.

By aligning the process across your team, adding criteria for moving deals to the next stage, and making sure all deals go through the same steps, you can prevent spending too much time on the wrong opportunities. This deeper level of efficiency keeps your deal team focused on high ROI activities and what they do best – deal sourcing, analysis, and closing.

**While first generation deal management solutions focused on helping you track your investments, Origin helps you invest better.**

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## **Make better decisions, everytime.**

Origin is designed to give you a unified view of every investment over time – from screening through closing, add-on investment, refinancing, and disposition. In addition to informing your front-end decision-making, these insights can also be used to continuously tune your process.

To optimize your deal process, you have to identify and fix the bottlenecks – whether that's not enough deals at the top of the funnel or a function of your process slowing things down. With Origin, you have information about each step, who's involved, how long it takes, and what happens at each stage in the process. Seeing the deal lifecycle provides ongoing insights into where and how your data can better serve you:

- ▶ **How long do deals spend at each stage?**
- ▶ **What is the conversion rate at each stage of your process?**

- ▶ **Which deals make it to the late stages of the pipeline only to be rejected at IC?**
- ▶ **Why are you losing out on deals?**
- ▶ **How did deal approval assumptions align with actual returns?**

By making it easier to spot issues and identify opportunities to improve your investment process, you can create a culture of continuous improvement within your deal team.

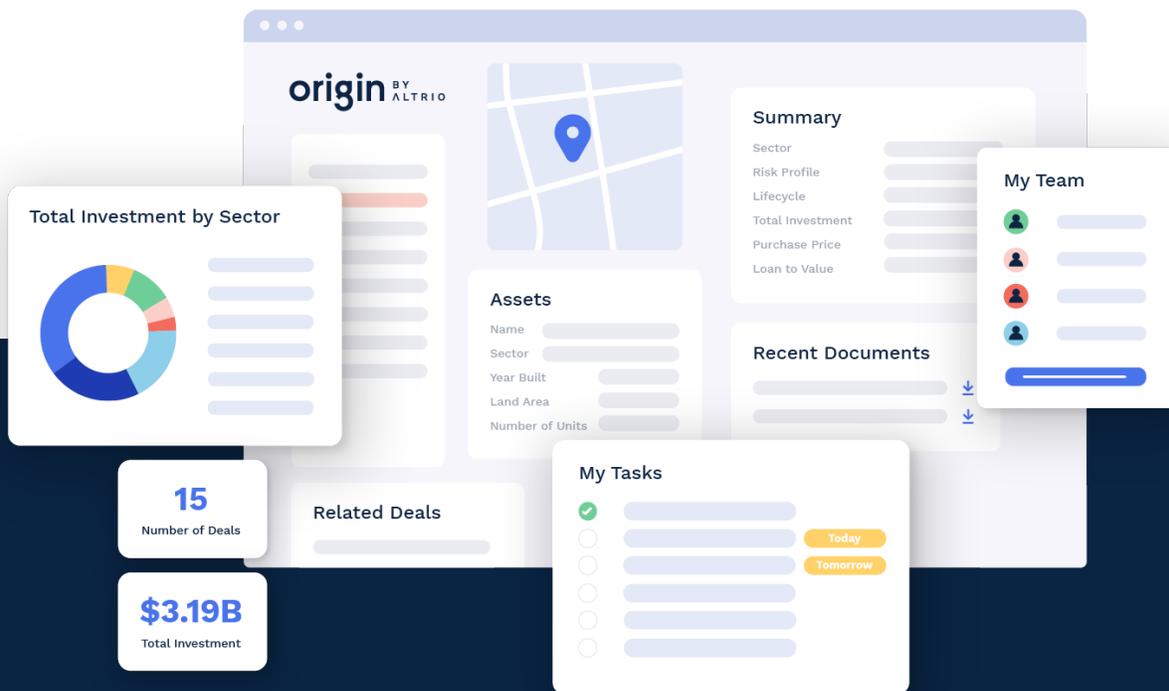
At Altrio, our goal is to help everyone work smarter at every step. Your front-line dealmakers no longer have to spend valuable time maintaining clunky Excel spreadsheets and manually preparing reports. Automated information flows keep everyone aligned with a single, shared source of information about deal status, outstanding tasks, and important upcoming events. And with one-click access to information that's tailored for different stakeholders, everyone has the perspective they need to help get deals done.

## Deal management designed for the frontlines.

Altrio was founded on the core belief that technology can meaningfully improve the performance of your investment process so you can do more deals with better outcomes.

While early efforts in deal management software have delivered back-end time and administrative savings, today's real estate leaders recognize that deal management isn't purely about productivity. Whether you're a boutique firm or on the frontlines of a large organization, we believe deal management software that gives you the power to work smarter and faster can actually make you a better investor.

From deal screening to pipeline management to investment process optimization, we designed Origin to give you an end-to-end advantage. It's deal management software infused with your own market insights and experience, powered by algorithms that adapt to today's changing world. And we've built it all with one goal: to help you close more, better investments and build a winning portfolio.



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