



Private Equity

Manage relationships, deal flow, fundraising, and reporting with the simplicity of a leading low-code platform.

Streamline processes for faster time to revenue.

Private equity firms dedicated to revolutionizing their operations, business models, and processes with innovative technologies have seen 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.

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 technology 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.

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

Appian private equity firms can:

- Accelerate outcomes.
- Drive revenue growth.
- Streamline internal operations.

Explore the Appian suite of applications for private equity.

P/E Deal Lifecycle	P/E Investor Lifecycle	P/E Fund Operations	P/E Portfolio Operations	P/E GRC and Corporate
<ul style="list-style-type: none"> Deal initiation and review Tax optimization coordination Legal entity management Deal codes management Sales automation marketing management Deal pipeline management 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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) 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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 is the unified platform for change. We accelerate customers' businesses by discovering, designing, and automating their most important processes. The Appian Low-Code Platform combines the key capabilities needed to get work done faster, Process Mining + Workflow + Automation, in a unified low-code platform. Appian is open, enterprise-grade, and trusted by industry leaders. For more information, visit appian.com/finserv.