

Investment Opportunity Management System

Implementation Partner: Tech Evolution Technology Systems | Customer: A Diversified Group of Companies Operating in Industries Such As Real Estate, F&B, Hospitality, etc.

ABOUT PARTNER

Tech Evolution believes in leveraging technology to deliver customized digital approaches and solutions.

They provide agile high-quality end-to-end technology services that range from custom software development to cybersecurity, from artificial intelligence models to blockchain platforms, from IoT and smart home technologies to virtual reality experiences.

CUSTOMER AT A GLANCE

The customer is a dynamic and diversified group of companies operating in various industries, including real estate, F&B, hospitality, etc.



Industry:
Global Services



Firm Size:
100-200 employees



Country:
United Arab Emirates



Faster lead processing time



Achieved single source of truth

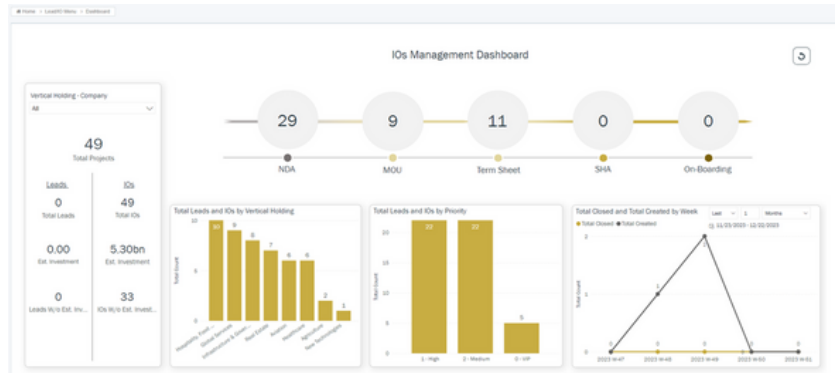


Controlled employee information access

CHALLENGES

- Faced challenges in obtaining complete and consistent information as the data came from various sources. Generating accurate reports was another challenge
- Unable to track the progress of every lead, as it was currently done manually in Excel
- Consistency and accuracy in the information entered during lead creation and approval stages were essential. Refining the process of transitioning from Lead to Investment Opportunity (IO), and eventually to the onboarding of the company stage was a significant challenge
- Managing the manual calculations and updates necessary for evaluation criteria, including sets of questionnaires, weighted scores, and weightage, posed a challenge

SOLUTION



A **Investment Opportunity Management System** was built on Joget in 6 weeks with 1 Joget developer and 1 Power BI developer, to streamline the organization's investment efforts in acquiring new shares or new companies. This includes the process of identifying shares and leads, and evaluating them based on criteria. Due diligence is constantly conducted to assess the financial, legal, and operational aspects of potential companies during the acquisition process.

The solution effectively handles investment opportunities by centralizing and automating functions such as lead creation, assessment, dashboard reporting, and opportunity management. It streamlines the acquisition process in a structured framework, providing real-time insights for informed decision-making within the organization.

RESULTS

- ✓ Average time taken to move a lead through the stages of Lead > Screening > Request for Approval significantly decreased and was consistently monitored with real-time updates
- ✓ Able to access and extract comprehensive details from one single source of truth through the Power BI Dashboard, enabling users to obtain accurate data about Leads and Investment Opportunities. Able to export an IO List Report with IO information, categorized based on industries
- ✓ Internal employees, through user access controls, will gain access only to information relevant to their own leads, e.g., industry, item descriptions, weighting, vertical holding names, and more
- ✓ Able to generate a Lead Assessment Report post-approval, inclusive of reviewer and approver comments, lead information, description and lead owner, priority level, investment size, current phase, and evaluation with a summary of scoring, weighted score, number of fails, etc.