S W E E T W A T E R
P R I V A T E   E Q U I T Y

Sweetwater invests in market-leading companies alongside top private equity and venture capital firms. Our team brings decades of principal investment experience as well as deep operational, underwriting and deal structuring expertise to the private equity secondaries market. We specialize in working with General Partners to generate liquidity for single assets or portfolios of assets. Sweetwater has deployed hundreds of millions of dollars of capital across dozens of companies. The firm was founded in 2016, and it is an SEC-registered investment advisor.

PLATIVE

Plative is a Salesforce Premium Implementation partner as well as an Oracle NetSuite Alliance Partner. As a global consultancy, Plative builds long-lasting partnerships with some of the world's leading financial services firms to strengthen relationships, streamline processes and surface insights.

Business Case

Sweetwater lacked a solution for managing their deal lifecycle in one centralized location. They needed the ability to track prospect meetings along with meeting notes, and then categorize and report on their specific interests.

Solution

Plative upgraded Sweetwater from Salesforce Essentials to **Salesforce Enterprise Edition** along with **Plative's Fundsight Accelerator**, which provides the core data model for an alt-asset firm to manage fundraising, deal execution and portfolio performance within Salesforce. A **Pitchbook** and **Salesforce** integration was implemented to provide Sweetwater with critical information on their customers and prospects. Finally, **Outlook** was integrated to automatically log activities and enable Sweetwater team members to easily track conversations and deals.

Outcomes

Implementing this solution allowed Sweetwater to manage all processes in one place and have full visibility of their deal cycles all within Salesforce. The solution removed their Excel based processes and manual work. It allowed Sweetwater to increase productivity and focus on their clients.