



"The industry and Salesforce expertise of the Plative team is second to none. They provided solutions specific to our business model and communicated our implementation plan effectively. We look forward to continuing our partnership with Plative."



**Jon Mariano**  
Director of Project Management



Republic Capital was established in January 2019. They select investments based on business fundamentals with a focus on unit economics and resilient revenue. They aim to invest in portfolio companies that are poised not just to withstand a downturn, but to emerge even stronger. In other words, companies they believe don't need endless venture capital to survive.



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

Republic Capital, a division of Republic, needed the ability to track capital raising, interested Limited Partners (LPs), which LPs have committed capital and wired funds, and other key information. They needed a tool to help vet out which portfolio companies they will engage with and track the steps required for their investment committee to make a decision. They also wanted to track active prospecting in stages and have mobile capabilities.

## Solution

Republic Capital and Plative implemented **Salesforce Sales Cloud** as their central platform for tracking deal execution, prospective investment targets, and the lifecycle of limited partners. Gmail was integrated with Salesforce to connect their email and calendar using **Salesforce Inbox**. **Salesforce Anywhere** was used for real-time collaboration on documents and spreadsheets. The creation of a special purpose vehicle module (SPV) was custom designed and implemented to track fundraising progress against goals and to link current investors to specific projects/portfolio companies.

## Outcomes

Salesforce allowed Republic Capital to eliminate the manual work of spreadsheets and use a single system for their customer relationship management. The use of dashboards enhanced their reporting capabilities across the business and memorialized key information on raises, SPV progress, and portfolio companies.