

We Handle the Back-End So You Can Move Forward Confidently

Smart Support
for Lean Teams



Who We Work With



Investment Managers & RIAs

When capital is tight and headcount is limited, there's little room for inefficiency. Cascal steps in to deliver hands-on support in marketing and operations, helping lean teams build systems, elevate communication, and scale smart.

Quick win: Launch polished investor materials and a clear reporting process without onboarding a full-time team.



Private Equity & Venture Firms

Platform teams are pulled in every direction from portfolio support, community building, operations, events, and internal coordination. Capacity is limited, but expectations aren't. Cascal fills that gap with strategic execution and flexible platform management support for your portfolio companies.

Quick win: Oversee end-to-end reporting cycles, build investor-ready materials, and manage quarterly consultant updates.



Portfolio Companies

Growing companies stretch internal teams to their limits. Cascal provides fractional operations, marketing execution, and platform management support, tightening workflows, clarifying messaging, and reducing the burden on lean ops teams.

Quick win: Standardize templates and provide ops and marketing support across portfolio companies to reduce internal lift.

Core Services



Platform Support

- > Portfolio & Firm platform management
- > CRM implementation and data management
- > Workflow development and documentation
- > Onboarding and training systems
- > Vendor and internal support coordination



Fractional Support

- > Leadership across marketing and operations
- > Project-based execution
- > Fundraising and investor
- > Communications support
- > Cross-functional coordination and reporting alignment
- > Fund evaluation due diligence



Marketing & Events

- > Investor-ready materials and presentations
- > End-to-end event planning and execution
- > End-client friendly communication
- > Template creation
- > Design and production of marketing collateral

Where We Add Value

Focused expertise across operations, marketing, and execution to support teams at every stage of growth.



Platform Management

- Portfolio assistance
- Initiative Oversight
- Cross-team coordination
- Roadmap ownership
- Progress tracking



CRM

- Dashboard customization
- Report development
- Data quality control
- User training
- System integration



Reporting

- Investor update templates
- Fund summaries
- Quarterly reporting
- Custom visual dashboards
- Document version control



Processes

- Internal process mapping
- Workflow audits & redesign
- Team alignment tools
- Task ownership tracking
- Operational checklist



Onboarding

- Welcome kits & orientation
- Customized onboarding kits
- Technology & access setup
- First 90-day workflow plan
- Onboarding & training



Playbooks

- Operations playbook
- Communications template
- Workflow guides
- Team continuity tools



Portfolio

- Portfolio project tracking
- Centralized records oversight
- Strategic event execution
- Insightful feedback reporting
- Litigation records tracking



Fundraising

- RFP & DDQ management
- Capital raising materials
- Investor outreach execution
- Fundraising cycle tracking
- Consultant platform updates



Investor Materials

- Tear sheets and one-pagers
- Track record presentations
- Investor presentations
- FAQ & responses
- Data room readiness



Marketing

- Social & email content
- Website strategy
- Copywriting
- Performance tracking
- Founder & firm storytelling



Events

- Annual meeting logistics
- Summits & roundtables
- Roadshows
- Virtual & hybrid formats
- Speaker/vendor facilitation

**Value-Driven Support
Tailored For You**