

Where We Add Value

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



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



Automation

- Email workflow setup
- CRM triggers & rules
- Scheduling & reminders
- Internal alerts & updates
- Lead intake automation



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



Branding

- Logo & visual identity
- Design templates
- Style guide creation
- Portfolio messaging strategy
- Swag concept & execution



Events

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

Value-Driven Support Tailored For You

Contact Us

www.cascal.ai