



Let your advisors deal, while Pitchly tracks and automates pitchbook credentials

Managing your firm's data and activating it to create custom pitch content doesn't have to take up hours of your time each week. Centralize your data and take advantage of automation to drive efficiency and meaningful time savings.

Pitchly is a leading cloud-based data enablement platform for accounting, marketing and business development professionals. We provide a robust, user-friendly database to enter deal data and a content designer to automatically generate tombstones, case studies, logo slides, team bios/CVs, and company profiles.

The result? Growth-focused teams and advisors save 93% of the time previously spent preparing credentials and researching firm deal experience. This is Data Enablement.

Join the thousands of global users who are saving time and winning more new clients.

How Pitchly can help your accounting firm succeed:



Automate repetitive, manual content creation tasks



Save time for more strategic tasks



Ensure data accuracy across the firm

CHOATE

BDO

EF Hutton

Greenberg Glusker

Centralize your deal data

Pitchly helps you bring together data from all your disparate sources at setup, integrating your current systems and loading data from Excel sheets. This gives you a single, searchable and filterable database, giving you seamless up-to-the-minute access to any data you need for pitch content.

22

Average proprietary data points stored by accounting firms using Pitchly per deal

Forms help you collect data quicker and easier

Make it easier for your advisors to input reliable data. Create multiple forms to accommodate different deal types and information needs. Deal teams can input data and include an approver user to accept input into the database.

Access a live deal tombstone library

Don't duplicate tombstones from old pitchbooks. Pitchly's integrated database approach feeds live source data directly into each tombstone.

Use Pitchly to automatically generate:

- ✓ Deal Tombstones
- ✓ Bios & CVs
- ✓ Case Studies
- ✓ Proposals
- ✓ Marketing One Pagers

Automate your data-driven content

By combining your live database with on-brand dynamic content templates, generating accurate and pixel-perfect content in minutes, not hours. Simply filter the information you want to appear, select the template you want it to populate in, and export to the platform of your choice.

Benefits of the Pitchly Platform:

- Can integrate with your proposal software to streamline document preparation.
- Secure your data from external and internal threats with robust encryption and access protocols and the platform's SOC 2 Type 2 clean opinion.
- Protect your firm's intellectual property by securing it despite staff turnover.



Get Started Today

The future of work is data driven. Put your experience data to work for you. To learn more or request a demo, visit us at www.pitchly.com.