



An Innovative Approach to Adopting Technology

bridgepoint | INVESTMENT BANKING

ABOUT BRIDGEPOINT

Bridgepoint Investment Banking is a tenacious, innovative and results-oriented independent boutique investment bank focused on impact and value creation for the companies we serve. We provide confidential, creative and unconflicted capital solutions and strategic advice to clients globally across a range of focus sectors.

We have an unequivocal focus on our clients and their prosperity. We measure our performance by the long-term success of our clients.

Website

www.bridgepointib.com

Industry

Investment Banking

Locations

Des Moines, IA
Omaha, NE
Lincoln, NE
Denver, CO

Innovators are often looking for a better way. A way to create efficiencies in the form of saving time and money, but it's even better when the innovative solution provides peace of mind. That's what Pitchly has done for Matt Westra, Associate at Bridgepoint, a Midwest investment banking firm with locations spanning from Des Moines to Denver. Both Westra and Managing Director Adam Claypool know the way business is conducted in their industry hasn't changed much, but the technology and tools available are constantly evolving.



Firms have to adopt and adapt to stay relevant. There are endless tools to use. We are always looking for something that brings value, yet is easily customized to our business. Pitchly is one of those solutions with a roadmap that aligns with our approach.



Adam Claypool
Managing Director

Achieving peace of mind, confidence in experience data

Prior to adopting Pitchly, experience was tracked and logged by several people in a Master Excel file saved in the cloud. It had no consistent entry, no standardized fields, and no way to ensure accurate information wasn't overwritten. If a duplicate file was created, Westra was left with uncertainty on which file was the most up-to-date for the relevant experience he wanted to leverage. Replacing this system was the initial value he saw in Pitchly. It would allow him to efficiently and accurately track the firm, portfolio, and team experience, while creating standards and normalizing the information to use in documents, such as Tombstones and CVs.

"Within days, we were using our data in an interactive way," shared Westra. And while he was aware of Pitchly's customer support, he's never used it since his initial call. "It's user-friendly and easy to configure fields and customize and modify the templates."

Westra added, "While it does save me time when I make Tombstones, what I really appreciate is the peace of mind knowing the information is correct and relevant. Version control was a challenge, and now everyone is working from a single source of truth."



Matt Westra
Associate



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Creating compelling, high-quality marketing content

To remain competitive, Bridgepoint is forward-thinking and understands pitches must continue to be more creative and compelling. "We try to be a forward-thinking firm and are always looking for innovative tools and strategies to assist with our sales and marketing efforts," said Westra.

Knowing he can quickly export relevant, accurate Tombstones has allowed him to focus on the quality of the content. "We utilize three different Tombstone formats designed to show one, two or three parties' logos. Creating easily customizable

experience slides for pitchbooks is now done in a few clicks of a button, rather than deleting and resizing hundreds of objects in Powerpoint."

Claypool shared that he appreciates that Pitchly allows them to more efficiently produce materials than navigating complex spreadsheets. "We operate in a spreadsheet world, so if we can find a better, quicker way to produce and repurpose more effective marketing content, we are interested."

Unexpected added value

Bridgepoint found a solution for managing an experience database and tombstone creator, but they also discovered some other benefits:

- **Track & Use More Data** – The information Westra tracks is also growing. "I'm able to add and configure new fields for data I wanted to track. I created new categories and have already used them."
- **No More "Master Pitchbook"** – Once a month, he'd spend time updating the broad pitchbook, which had similar data management challenges like the "Master Excel" file.
- **Placing and Sizing Headshots & Logos** – Westra also stores team headshots and logos in Pitchly, and they are included in the templates he's created.

Always looking to the future

Both Westra and Claypool plan to continue leveraging tools and technology that increase efficiencies and improve the quality of their work. "Junior teams are receptive to new tech, and our leadership is focused on creating an environment that creates personal success and success for the firm."



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Discover how other Pitchly customers are making their data accessible, yet safe and secure, and bypassing the challenges of stringent data requirements.

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