

How do you use the PitchBook CRM integration in your workflow(s)?

“ We use the data from the PitchBook CRM integration to search for prospective clients and sponsors. Access and integrate information into our Salesforce CRM platform for prospective portfolio companies and sponsors and update information as we move them to clients.

— Business Operations, Medium Enterprise Financial Services Company

Source: Business Operations, Medium Enterprise Financial Services Company



TechValidate
by SurveyMonkey

✓ Validated

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