Datasite Pipeline™
Advance your buy-side opportunities.
Strategize, source, and secure deals – faster

Your M&A strategy is only as good as your pipeline of targets. For something that important, you need smarter tools. Get out of basic spreadsheets. Get into smarter strategizing with Datasite Pipeline.

Then move from deal sourcing to due diligence seamlessly, all in the same platform. One trusted place to strategize, source, and secure deals – faster.
Discover your next deal

Datasite Pipeline transforms your existing workflows into one consolidated view so that the information in your pipeline is highly visible, shareable, and, most importantly, actionable.

And while your buy-side journey begins with Datasite Pipeline, it doesn’t end there. Along with Datasite Pipeline, your access includes a subscription to Datasite Cloud™, which unlocks a whole suite of applications.

Gain access to:
- Datasite Outreach™
  Effortlessly manage your deal marketing
- Datasite Pipeline™
  Advance your buy-side opportunities
- Datasite Diligence™
  The premier sell-side data room
- Datasite Acquire™
  The first data room built for acquisitions
- Datasite Archive™
  Preserve and protect your project data
Manage your potential targets

Your M&A pipeline likely has hundreds, if not thousands, of potential targets. Use our trackers tool to track not only the important facts about your target, but also all communications and files that exchange thereafter. Getting started is easy too. Simply upload your existing Excel spreadsheet. Now everyone has access to the same, standardized information about all your targets.

Work intuitively
Don’t reinvent the wheel. Our trackers tool utilizes a familiar-feeling spreadsheet interface, but with real-time changes and purpose-built columns. One row will then contain a standardized set of data for one target.

Assign views
Create different views of the same tracker by hiding specific columns or filtering out information. This way, you can separate data for a certain ‘deal lead’ or keep teams focused only on ‘high’ priority targets.

Track activities and tasks
Capture activities between you and your targets under each tracker row such as meeting type, emails, calendar reminders, and important files. Conveniently assign tasks to team members associated with opportunities.

Create tear sheets
Does someone need a refresher on an old target? Summarize target information neatly with customizable templates that utilize existing columns. Export tear sheets to PowerPoint for easy reporting and distribution.

Communicate on the go
With the mobile app, keep tabs on targets, key status, and communications. All your contacts are stored in one place and at your fingertips – reach out with a tap.
Analyze progress in a dash

Assess your M&A pipeline’s status and health at-a-glance right from the dashboard. Drag and drop tile-like widgets in your desired order to make sense of the hundreds of targets in your pipeline and run your weekly meetings. Or create a dashboard each for your investment committee and board of directors. Now all stakeholders have an overview that’s granular to their role.

Visualize your pipeline
Create bar, pie, and funnel charts that display column inputs from trackers to compare targets’ EBITDA, opportunity stage, or any other defined value. Find out at-a-glance how many CIMs are in play, or which deal leads have too much on their plate.

Customize widgets
Besides graphs, widgets offer another view of your data. Insert document updates to view new additions, maps to see where your opportunities are located, and login history to see if anyone needs to refresh their inputs. You can also keep a list of tasks front-and-center for the team to action.

Repurpose with ease
Export entire dashboards or specific graphs to PowerPoint for easy reporting or reuse in your own existing cadence of deliverables.
Action from your inbox

When inbound leads arrive from different sources, conversations get lost. Don’t duplicate your efforts by manually consolidating those leads. Simply forward emails to or CC the project inbox and action from there. Now everyone has visibility into the development of the entire M&A pipeline, and can comment upon, assist, or just stay in the loop.

Consolidate emails
Attach any email forwarded into your project inbox as an activity to a target in trackers. Files attached to the emails are conveniently included and saved in the tracker.

Create contacts
Click any email address within your project inbox to create a contact. Contacts are stored in a separate tab, with the ability to add notes up to 10,000 characters long. Never lose someone’s contact information again.

Guard your project inbox
Set permissions to control who can send emails into your project inbox. Choose from project users only, project users and approved email addresses, or anyone with the project inbox address.
Retain every record

NDAs, IOIs, LOIs, CIMs, teasers... Datasite Pipeline includes a dedicated file storage system in the Documents tab so that four years from now, you can check leverage levels from when you initially passed on that deal. Never lose a CIM to the depths of a shared drive again, and never choose what’s worth saving or not thanks to unlimited storage.

Stay in sync

Keep organized since trackers will automatically create a folder in the Documents tab for each target. Plus, file attachments from activities created through the project inbox will show here too.

Save without limits

There is no cap or limit on the number of files that you can store in Datasite Pipeline. Measure by gigabytes, pages, or what-have-you, storage is unlimited so that your knowledge of the target is complete into perpetuity.

Set permissions

Grant access to files and folders on a need-to-know basis. Easily set content access permissions for both users and workstreams to restrict access to specific files or folders in the ‘documents’ tab.

File and find everything

Create as many folders in as many separate filerooms as needed. Store meeting minutes, investment committee memorandums, and more. Use full OCR search to quickly find terms in all document types, and view documents on the go.
From one opportunity to the next

You’ve identified your next target. Now what? Preparing for buy-side due diligence is a breeze with your access to the entire suite inside Datasite Cloud. Move from deal sourcing to securing deals in minutes. Your playbook, your workflows - all ready to go in a buyer-led data room.

Start with Datasite Pipeline…
In buy-side M&A, your pipeline is your lifeline. Organize the thousands of conversations that go into building that pipeline and the hundreds of targets that you’re tracking with Datasite Pipeline. Identifying your next target has never been easier.

…and continue with Datasite Acquire
Take control of your buy-side process with the first deal management platform designed just for the buy side. Open a Datasite Acquire project with a few clicks right inside Datasite Pipeline. Make better decisions, faster, and save an average of 24 days on every deal.

All backed by Datasite experts
Questions? We’re with you every step of the way. Your access includes multi-layered support.

Reach out to your Customer Success Manager – your primary contact, point of escalation, and strategic partner. You’ll get onboarding help, training, performance monitoring, quarterly business reviews, and product roadmap updates.

Plus, count on extended support from our 24/7/365 Customer Service team via online chat, email, or phone.

Access our self-service portal for guides, FAQs, account management, and more.

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