

# NY-Based Sell-Side Firm Leverages Sourcescrub to Fuel Its Sourcing Strategy

## About the Sell-Side Firm

This NY-based sell-side firm provides full-service M&A and capital-raising advice for entrepreneur-led technology businesses. The firm's team of seasoned bankers offers deep domain expertise and customized solutions to drive maximum valuations and deliver superior results.



## Case Study Highlights

**10x**

increase in annual deal flow volume

**20x**

boost in business development productivity

**90%+**

of won sell-side deals sourced via Sourcescrub

## Challenge

### Highly Selective Sourcing Criteria for Private Companies

The business development (BD) team at this sell-side firm is tasked with finding high-growth, entrepreneur-led software companies that are ready to transact and fall within the bank's target verticals. This not only requires an understanding of entire sectors, but also and the ability to pinpoint the most promising players before anybody else. However, this level of speed and precision is difficult with traditional sourcing tactics.

"I remember poring over phone books and tax code databases searching for relevant opportunities. Finding these companies was hard, and doing it efficiently and at the scale necessary to succeed was almost impossible," recalls a firm associate.

## Solution

### The Ability to Cast a Wide Net and Then Zero In

Today, the associate starts his sourcing process by searching Sourcescrub for industry-specific keywords. He also uses the tool to filter conference lists by high-level criteria such as ownership type, and then tags these to create a large list of potential opportunities. "My initial goal is always to cast a wide net so that I can get a lay of the land and don't miss anything," he explains.

From there, he filters his list using private company data signals like employee growth, resulting in a selection of qualified, transaction-ready businesses that match the firm's investment theses. The associate also gets automatic notifications whenever a new company meets his criteria.

## Results

### A Scalable Sell-Side Sourcing Machine

Today, the bank credits Sourcescrub for playing a major role in powering their rapid growth. The associate estimates a 20x boost in productivity for his team.

The platform also helps uncover higher quality opportunities that match the firm's highly selective investment criteria. The firm's annual deal flow volume has increased 10x since using Sourcescrub, with more than 90% of won sell-side deals now originating from the platform.

"Sourcescrub not only helps us see more opportunities, but it also puts us in a position to win more often because these aren't just any deals – they're the exact right deals for our firm," shares the associate.

## About Sourcescrub

Sourcescrub is the leading Sources-first Deal Sourcing Platform for investment and M&A teams looking to research, find, and connect with founder-owned companies. Founded in 2015, Sourcescrub leverages AI and on-demand data operations to provide rich deal-ready data, unique insights from over interconnected 150,000 Source lists, and an AI-driven platform to give firms a decisive advantage so they never miss a deal. To learn more, visit [www.sourcescrub.com](http://www.sourcescrub.com)