

A client-centered approach to M&A:

How Headpoint Advisors Uses Gain.pro to Streamline M&A and Deliver Client Value



Founded in 2019, Headpoint Advisors is a corporate finance firm based in Birmingham, UK, that specializes in advising small to medium-sized business owners on company sales, management buyouts and acquisitions, typically within the £5 million to £100 million deal range. Focused primarily on the sell side, Headpoint Advisors serves clients across manufacturing, technology, industrials and business services sectors. Their approach is distinguished by senior, hands-on advisory support who provide deep expertise tailored to each client's needs.

The Need for a Private Market Intelligence Platform

As a young firm, building a strong tech stack was a key priority for Headpoint Advisors as they recognized that technology could enhance both their operational workflows and client outcomes. While the team leveraged other data solutions, no one platform contained all the key information they needed to gain the full picture of a deal landscape, leading them to flip between several sources. With a centralized platform, they could gain efficiency within their workflow.

“Having access to niche sectors, deals, and general market information in one platform was essential. We needed a tool that could provide a deeper level of information in one place – financials, key contacts, and more – so that we could avoid switching between multiple platforms. It’s efficient to have everything centralized in one platform.”

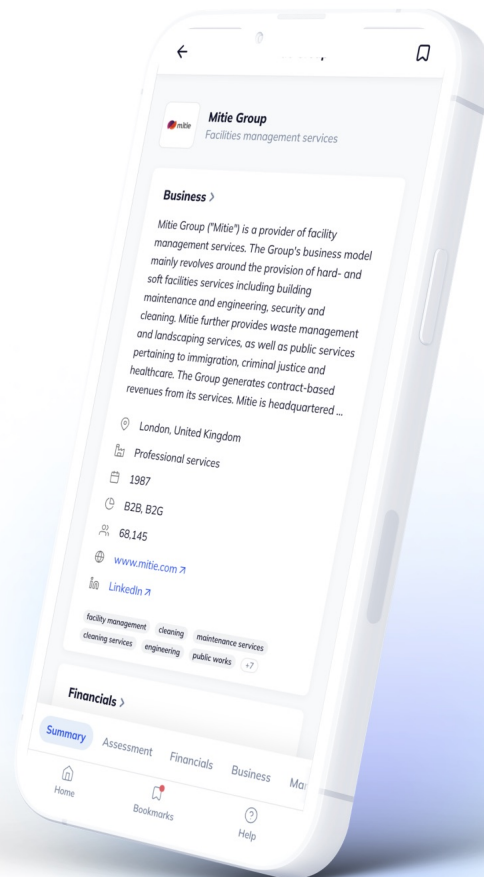
Victoria Bond

Origination at Headpoint Advisors

Going for Gain.pro

After assessing various options, Headpoint Advisors procured Gain.pro because of its differentiated depth of market insights and user-friendly interface. **“Gain.pro is clear and easy to use.”** - Victoria Bond

Another large factor that played into their decision was the fact that Gain.pro is built by professionals who come from the M&A industry and understand advisors’ most pressing challenges. The platform is designed for M&A use cases, covering all relevant data that supports an efficient and effective workflow.



“What made Gain.pro appealing to us is that you have M&A professionals in your team, involved in building the platform.”

Victoria Bond

Origination at Headpoint Advisors

Use Cases:

Private Market Research on Companies and Industries

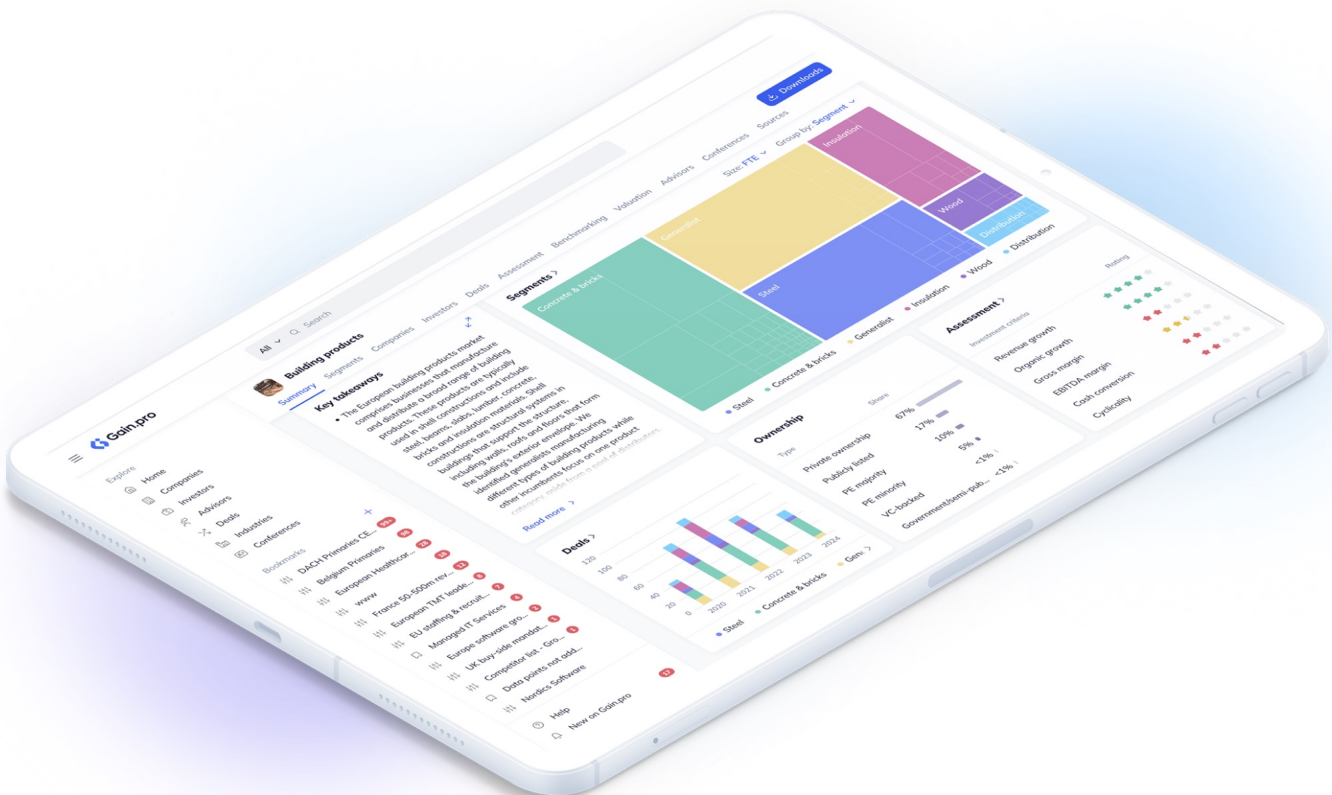
Headpoint Advisors leverages Gain.pro to conduct private market research, both at the company and industry level. For individual companies, Gain.pro is one of their primary resources, providing curated profiles that include:

- ✓ Concise business descriptions
- ✓ Cleaned financials
- ✓ Ownership information
- ✓ Business assessments
- ✓ Market insights
- ✓ And much more

“Gain.pro is one of my daily go-to places for research. If I only have a company’s website, it’s enough to produce results on the platform, which is a useful feature. From there, I can deep dive into the company profiles”

Victoria Bond

In addition to company profiles, Headpoint Advisors leverages Gain.pro’s industry reports to gain a comprehensive view of niche sectors. These reports provide detailed market information, as well as lists of the key players and active investors in the industry. From this, Headpoint Advisors can find strategic buyers and investors for their clients in niche industries.



Building Strategic Buyer Lists

Headpoint Advisors uses Gain.pro to create highly targeted buyer lists for their clients. To do this, they start by searching for companies using the platform's granular filter and tagging system that allows them to search using criteria such as region, sector, tags and more.

"Being able to extract the specific data using the filters and tags is helpful. The tagging and filtering for companies provides relevant results."

Victoria Bond

The team can then save these active filters as Bookmarks that update as new companies fall within the criteria. Alternatively, they can add their own selection of companies to a static list. These lists are automatically updated as new company information is added to the platform. The team can share their Bookmarks with each other, so everyone can seamlessly collaborate on projects and proactively track the companies in their lists.

"Being able to bookmark our own lists is useful. We can share ownership among the team, so if anyone finds additional companies or information, they can add it directly to the list."

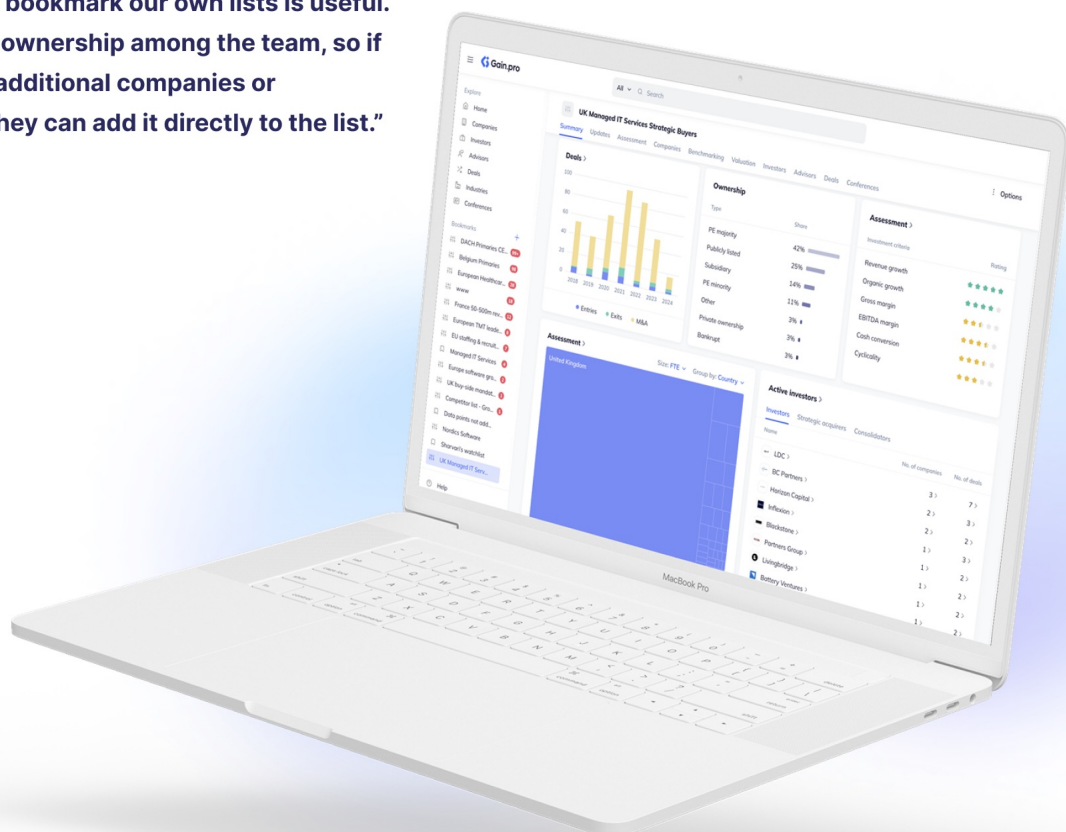
Victoria Bond

Gaining Visibility on the Deal Landscape

Headpoint Advisors relies on Gain.pro to quickly gain a view on the deal landscape in the private market. The Deals tab on the platform allows them to efficiently search for and analyze relevant deals, providing insights into recent activity and trends within their targeted industries. By filtering deals according to criteria like region, deal type, metrics and investors, the team can focus on the most relevant data for each mandate.

"If I'm researching cybersecurity deals, for example, I'll go straight to the Deals tab and begin filtering by tags. I can select 'cybersecurity' and add as many additional tags as I need to narrow down my search. Once I have my filtered list, I export it to begin further analysis."

Victoria Bond



The Benefits of Leveraging Gain.pro

Since integrating Gain.pro into their daily operations, Headpoint Advisors have experienced an increase in efficiency in their workflows. With access to all the relevant private market information they need in one, centralized platform, the team can quickly get up to speed on projects and respond quickly to shifting priorities.

"With Gain.pro, I can gather information quickly for upcoming meetings and manage change control effectively. If I'm shifted from one project to another, Gain.pro supports the research process by producing swift results."

Victoria Bond

Beyond operational efficiency, Gain.pro has also enhanced Headpoint Advisors' client interactions. With fast access to comprehensive data on companies and

industries, the team can engage in more meaningful conversations, deepening client relationships and supporting business development efforts.

"With Gain.pro, I'm able to engage in deeper conversations with clients on their particular sector and with the team on new business. In this way, leveraging the platform has helped with business development."

Victoria Bond

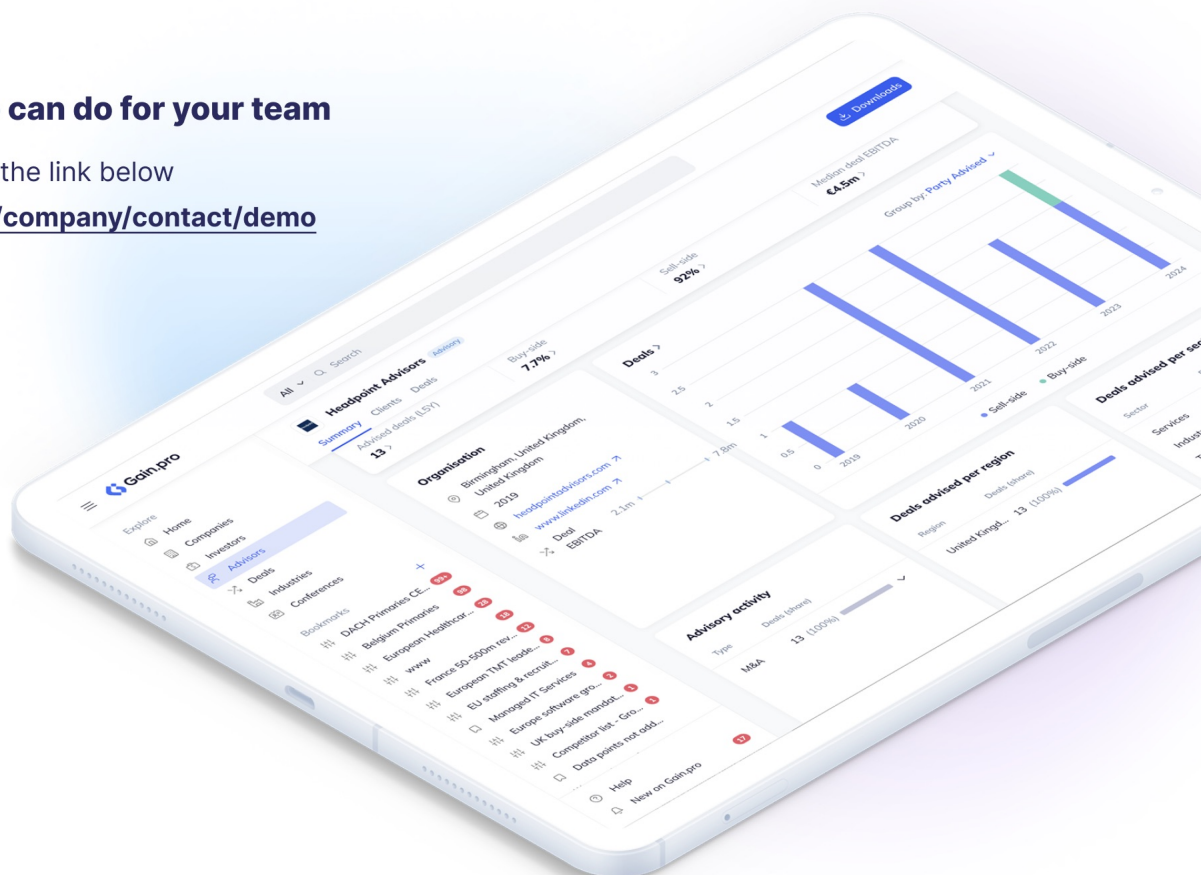
Because of the platform's ability to streamline their workflows, Gain.pro has become a helpful tool for Headpoint Advisors. **"It's one of the first tools I open in the morning, along with my LinkedIn and email."**

- Victoria Bond

See what Gain.pro can do for your team

Request a demo using the link below

<https://www.gain.pro/company/contact/demo>





Find, understand and track
companies that matter to you