

FOR THE TEAM CHAMPIONING VERATA — AND THE LEADERSHIP REVIEWING IT

# The Business Case for Centralized Executive Intelligence

This document is meant to be forwarded. It lays out what Verata is, the economics of adopting it, how firms allocate the cost, and exactly what our buying process looks like — so every stakeholder walks into the conversation with the same facts.

## 01 What Verata Is

Verata is the all-in-one executive intelligence platform for PE talent and executive search. It centralizes the market knowledge executive decisions depend on — company financials, transaction histories, executive track records, and reference networks — into one system, so talent teams operate with the same context the deal team carries.

Coverage: built by continuously reading the open web — the full operating bench, every profile with the financial context of the companies behind it, mapped to the executive's tenure.

## 02 The Economics

The business case is not a cheaper subscription. It is the cost structure of executive decisions across the portfolio.

### \$100K+

#### Typical retained search fee

One search brought in-house — or one search materially accelerated — covers the platform many times over.

### Multiples

#### Cost of a mis-hired portfolio executive

Backchannel discovery surfaces the references candidates didn't provide, before the firm commits.

### Hours

#### Not days, per diligence cycle

Company intelligence, executive data, and references in one place — research that sprawled across tools happens in one sitting.

### One

#### Vendor, security review, and renewal

Replaces the fragmented PitchBook-for-talent, LinkedIn, and spreadsheet workflow.

## 03 How Firms Allocate the Cost

Verata's work product is portfolio work: CEO and CFO searches, leadership diligence, and succession planning at the companies you own. Many customers allocate platform costs to portfolio activity. We support this with usage reporting by portfolio company, so the cost lands where the value is created — and the talent function stays a disciplined line on the fund's P&L.

## 04 What Procurement Will Ask — and Our Answers

QUESTION	ANSWER
Security & compliance	Customer data is never shared across customers or with third parties, and is exportable and deletable on request. Security questionnaires and documentation provided on request.
Data provenance	Continuous AI reading of the public web — company sites, press, deal announcements, and professional profiles. Every fact links back to its source. Revenue estimates use transparent comparable-company analysis — every comp is visible. No black-box AI, no fabricated data.
Pricing structure	Annual platform agreement scoped to the firm: team size, portfolio breadth, onboarding, and support. Everything included — no feature tiers, no per-query charges, no surprise line items at renewal.
Contracting	Clean standard agreement; we support legal review and redlines. We'd rather start the partnership through your normal diligence than around it.
References	Customer references available for your evaluation, including PE talent teams and retained search firms.
Exit terms	Your saved research and search data are exportable. If we part ways, your data is deleted on request.

## 05 The Evaluation Path

- 1 Live demo on a search you're working**  
 Bring an active search or an executive you're diligencing. We run it together on the first call — your use case, real results. A written agenda is sent before every meeting.
- 2 Structured guided pilot (two weeks)**  
 Success criteria agreed up front, kickoff on a live search, weekly check-ins, run side by side with current tools. At the end: a benchmark against the criteria your firm set.
- 3 Scoped proposal**  
 A concrete, all-in number based on how your firm will deploy the platform — with the usage evidence from the pilot attached.
- 4 Security, legal, and signature**  
 We run your procurement process with you: security review, references, legal. Then onboarding on your live searches.

### For the champion carrying this internally

You don't need to sell this alone. We will join calls with your leadership, your CFO or COO, IT, and procurement — and we'll bring the materials each of them needs. The fastest path is usually one introduction: tell us who reviews this decision, and we'll take it from there.

## Contact

Josh Gardner, Founder · Schedule a conversation: [veratainsight.com/demo](https://veratainsight.com/demo) · Request a guided pilot: [veratainsight.com/trial](https://veratainsight.com/trial)