

MORGAN PARTNERS  
INCREASES HIGH  
QUALITY PROSPECT  
IDENTIFICATION BY  
80% WITH  
SOURCESCRUB



# ABOUT MORGAN PARTNERS

Morgan Partners is a mid-market investment bank focused exclusively on financial technology companies. As specialists in insurance, capital markets, and banking tech sectors, Morgan Partners has been offering clients deep industry expertise, strong network connections, and unmatched M&A advisory services since 2005.

## Case Study Highlights

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**3x**

improvement in  
company research  
turnaround time

**25%**

increase in sell/buy-side  
pitch invitations using  
Sourcescrub

**20%**

decrease in email  
bounce rates



# The Challenge:

## Maximizing Reach with a Specialized Focus and Lean Team

**Maintaining a hyper-specialized focus and best-in-class team sets Morgan Partners apart from other investment banks, but it also made direct sourcing a challenge.** Finding and thoroughly vetting companies that fit the firm's selective prospect criteria by searching Google and manually scrubbing conference lists simply wasn't productive or effective.

In an effort to scale their business development (BD) efforts, the firm brought on Sourcescrub and asked Mike Cavallaro to fully integrate the deal sourcing platform into the team's technology stack. "I had implemented Sourcescrub at my previous firm and was relieved to see that the platform was in place at Morgan Partners," shares Mike.

**"Most of our deals are on the sell-side, and with such specific criteria, I knew that we needed to expand our universe of potential**

**opportunities and engage with them in a very personalized way."**



# The Solution:

## Bootstrapped Company Data, Custom Scoring, and Tailored Outreach Automation

Since joining Morgan Partners, Mike has been part of two Sourcescrub renewals. **“Sourcescrub really is the standard for company data,”** says Mike. **“Not only does it cover the entire universe of private bootstrapped businesses, but the information it provides is consistently updated and quality-checked. It has everything we need and nothing we don’t.”**

In addition to using Sourcescrub to quickly search and filter through various conference lists, buyer’s guides, and other sources to find and tag relevant companies, the team relies heavily on the platform’s Google Chrome extension. This tool instantly displays key company information and executive contact details from Sourcescrub directly in the browser based on the website’s URL.

Once Mike has built a list of relevant leads, he utilizes Sourcescrub’s Custom Scoring functionality to rank these companies according to how closely they align with Morgan Part-

ners’ highly selective criteria. “There are so many data points that the firm looks at when vetting companies to determine whether they are a mutual fit,” says Mike.

**“Sourcescrub gives us access to more companies plus the ability to pinpoint and prioritize the ones that best match our guidelines, so that we can establish relationships with more prime candidates.”**

Sourcescrub automatically enriches Morgan Partners’ CRM, Salesforce, with data including C-Suite contact details, company sub-sector and geography, relevant growth signals like new hires and job counts, and more. Any inbound opportunities or data points captured during outreach are passed back to Sourcescrub, where they can be incorporated into custom scores, used to identify conferences to attend, and more.



# The Results:

## More Productive Sourcing, Better Response Rates, and Higher Transaction Volumes

Mike and the team at Morgan Partners credit Sourcescrub with helping to scale their BD operations while staying true to their values. **“Sourcescrub really enables us to stay lean and punch above our weight,” says Mike. “We have the same reach as much larger firms because we’re able to do so much more with less, even with such a specialized approach.”**

The ability to pinpoint companies that match the firm’s criteria, including bootstrapped businesses, has greatly expanded the BD team’s universe of relevant opportunities. **Mike estimates an 80% increase in prospects identified. In turn, this has resulted in record-breaking transaction volume and value for the firm.**

Because of this, Sourcescrub is now a cornerstone of Morgan Partners’ technology stack. Using the platform’s highly accurate executive contact details and company data signals to personalize direct outreach has dramatically improved the team’s email bounce, open, and reply rates.

**“Sourcescrub gives us all the data we need to not only find, vet, and connect with the right companies, but to really stand out to them as well,”** shares Mike.



Sourcescrub is the market-leading Deal Sourcing Platform for investment and M&A teams who need the most complete, accurate and connected view of private markets. Using a proprietary expert-in-the-loop AI process, Sourcescrub weaves more than 150,000 information sources and 15 million companies into a web of insight so you see more possibilities and win more often.

To learn more, visit  
[www.sourcescrub.com](http://www.sourcescrub.com)

