

Satuit Technologies

# SATUITCRM USERS: THE BENEFIT OF AN INVESTOR PORTAL



Look for a solution that provides substantial value-added benefits to your investors and to your relationship team.

# STREAMLINE INVESTOR REPORTING

The desire to streamline investor report delivery has led many asset management firms to adopt, or consider adopting, an investor portal. Several investor reporting software vendors offer portal software as an add-on function. However, client adoption is typically low because your portal is not providing the value investors seek. Equally important, access to the portal is not available to your internal staff who work with clients or to those in management who would benefit from on-line access to data and reports.

If report delivery is the sole function of your firm's investor portal, you will have accomplished operational efficiency and possibly increased your investor engagement, but you may be missing an important new channel to drive investor engagement, streamline operations, and support your investor relations and marketing team. Look for a solution that provides substantial value-added benefits to your investors and to your relationship team.

## Investor Portal Must Haves:



On-demand access to documents, forms, agreements, presentations & marketing materials



Updates as frequently as daily (depending on the type of investment)



Facilitates account opening, closing, updates & transfer processes



Supports up-selling & marketing initiatives



Integrates seamlessly with the contact and account data in your CRM



mobile-friendly

# DRIVING INVESTOR ADOPTION

What if your investor could streamline account opening and cash transfer forms? Or update their banking and personal data online? Or get answers to FAQ's? Or download forms and presentations you provided last week or last month (that would otherwise be buried in their email graveyard). An investor would find value in the time saving and access to information, making them much more likely to adopt the portal habit. They would also be more likely to be satisfied with the service you provide.



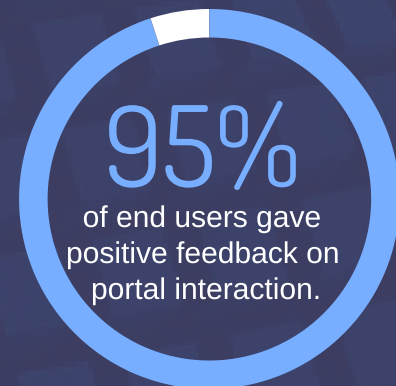
**The first step for a successful adoption is to make sure the investor portal is about the investor and not about the investment manager.** A successful portal includes and supports your marketing and retention goals as well. You may be asking yourself, how do I do this?

**Make the portal experience worth the investor's effort.** If you are going to ask your investor to set up a username and password, make sure the process is easy and they find real value for their effort.

**A winning portal strategy does not focus solely on operational efficiencies and report delivery.** A winning strategy uses the portal as an important channel for investor communications and engagement. A successful portal will make interactions easier for the investor.



**85%** of Satuit clients reported **Enhanced Investor Communication**



**95%**  
of end users gave  
positive feedback on  
portal interaction.

# SUPPORT YOUR INTERNAL STAKEHOLDERS

Another benefit of implementing the right portal is that you can support and streamline collaboration by providing portal access to client information for your relationship managers, portfolio managers, operations, marketing, and client administration. In many cases, these internal teams must navigate disparate operational systems, or they must have a reliable colleague to send them what they need.

This creates delays and sometimes errors in response to inquiries. Once you add SatuitSIP to your platform, your Satuit Administrator can give portal permissions to any licensed Satuit user. The SatuitSIP portal can significantly improve your team's ability to respond to client requests in a timely manner and ensure accuracy of the data they provide. The portal is easily accessible for every person in the client relationship.

## AN EXTENSION OF YOUR MARKETING

Statistics show your best source of new business is your existing client base. When your portal is an extension of your marketing and communications strategy, you have an opportunity to increase your success in cross-selling new funds.

As technology and algorithms improve, more e-marketing campaigns fail to reach their targets. Many e-marketing platforms report that an email is "delivered" when it is only sitting in the recipient's junk folder. That "90% delivered" statistic that your marketing team reports from your e-marketing campaign may be very

misleading. Many of those emails do not reach their intended recipient because they are in junk mail. Reaching the intended recipient is a growing challenge for marketing.

If you are upselling to existing investors, doesn't it make sense to reach them where they are reaching you? Doesn't it make sense to reward their effort of logging in to your portal with more than just their latest report? You have their eyes on your page, why are you wasting the opportunity to upsell and to further engage your investor?

**Emails sent to spam costs businesses a whopping \$20.5 billion every year.**

According to Nucleus Research, the average loss per employee was about \$1,934 per year. If it continues to grow at this rate, estimates suggest these metrics might rise to a staggering \$257 billion within a few years.

# BEST OF BREED OR MAKING DO?

The question you should ask is why implement an investor portal? Are you thinking strategically or just wanting to tick a box?

You can build your own portal if you have 3-4 spare web programming developers, a QA team, a product manager, a cloud services contract, security monitoring, and a support team to provide ongoing technical support. Alternatively, you can sign up for Dropbox or a similar low cost tool that will underwhelm your investors and broadcast low budget. Or you can implement a portal solution that may be provided with your accounting or investor reporting software. These tools are typically limited to your fund operations team and provide minimal access for the rest of your team.

Or, you can add SatuitSIP to your CRM platform and save money, save time, and deliver a tool that supports your entire team AND your investor.

When we first started building the Satuit Investor Portal in 2013, our goal was focused 100% on secure, timely document delivery. Today, we provide a tool that is used by portfolio managers, client administration, investor relations, and marketing. An investor portal should be the centerpiece of client communications, not a tool hidden in a silo that can only be accessed by a few members of your team.

## ABOUT SATUIT TECHNOLOGIES:

Satuit Technologies is the premier provider of CRM, reporting, and portal software solutions for Buy-Side asset management, hedge fund, wealth management, private equity, and real estate markets. The company has offices in Canada, the United States, and the United Kingdom and serves clients in more than thirty-five countries. For additional information, visit [www.tier1fin.com/satuit](http://www.tier1fin.com/satuit). For more information contact us at [sales@satuit.com](mailto:sales@satuit.com) or click on the link below:

[SatuitSIP®: Secure Investor Portal](#)