

A low-angle photograph of several modern skyscrapers reaching towards a clear sky, overlaid with a semi-transparent green filter. The buildings are arranged in a way that creates a sense of depth and height.

# Investor Portal

## Five Steps to Increase Adoption and Drive Success



# SATUIT TECHNOLOGIES

You've implemented an investor portal but adoption is disappointing.

You did it! You launched your investor portal. After months of hard work and testing, you've finally sent out the invitations to log in to your new investor portal. You've poured time, money, and resources into it. The new portal will streamline investor communications, drive investor engagement, and make life easier for your investor relations team. What's not to like. Your investor relations and investor admin teams are excited. And then...

OOPS! The audience isn't showing up. They still call and email you for reports and account information. They ask you to email documents. And you want to be nice, so you comply. With this headwind, how will you increase portal adoption and achieve the anticipated return on your investment?

Here are five things that you can do to help drive success.



# 1. Create Your Portal Success Team

Because an investor portal is using new technologies, implementing a portal is often seen as an IT project. However, it really has little to do with IT once they have reviewed the product security. In addition to investors, the key beneficiaries of the portal are management, investor relations, and marketing so they should be the ones that are highly involved with the roll out and ongoing updates to measure success.

Set business goals for adoption and put someone in charge of measuring them. Provide metrics to management.



## 2. Lower the Barriers to Entry

Create a frictionless experience for your investors from their very first use. Begin before the rollout by letting them know what to expect, and do this repeatedly. One email does not convert anyone. Make sure the user credentialing and authentication process is EASY. We have learned for our clients that many investors (and almost all institutional investors) prefer email over text or an authenticator app for secure two-factor authentication. They all have ready access to email from all devices, so it does not matter if they are on their computer or their phone.

The initial email you send welcoming investors to the portal often gets lost in junk mail. It should be easy (and standard practice) to send a follow-up email to let them know the credential link has been sent.

We also learned that it is very helpful to set a high number of failed login attempts before an investor is locked out. The Satuit Investor Portal allows the administrator to set up 10 login attempts. This allows an investor to deal with “fat finger” issues or attempt again if they have forgotten their password. They can stop and think before getting locked out.

If you have password rules, publish them on your portal login page as part of the login screen. When a user is creating a password, they should see what the rules are. This also helps to jog their memory if they have forgotten their password.





## 3. Educate Your Investors

Reach out and let them know this change (or update) is coming. Use your Investor communications (monthly/quarterly letter?) and your website to share this news. Use your e-marketing tools to communicate with investors. Satuit Investor Portal has fully integrated with Outlook which can be used for custom notifications and messaging. Ideally, you should include a link in your introduction emails to a video or short visual that gives investors an overview of the portal and highlights some of the key features. None of this requires special technology or consultants.

## 4. Pay Close Attention to the User Experience

A significant barrier to portal adoption is poor user experience. If your portal is unintuitive, difficult to use, impossible to navigate, or unresponsive to the needs of your audience, it will not get much traction.

So, addressing UX issues should be a top priority. Start by using the portal the way an investor would use it. Identify any obvious pain points in the user journey. Is the portal easy to use without training? Will investors be able to find what they are looking for quickly?

Is the portal's interface well-designed and attractive? You and your team members can do a thorough walkthrough of the portal users' journey in order to identify any glaring problems.

Think about ways the portal can help your internal stakeholders. For example, we use our portal for clients, vendors, and employees. We publish forms for new clients as well as training and onboarding materials for employees to their portals. We use the portal to manage vendors' proposals, contracts, and contacts.

You can also solicit valuable feedback from your investors and your employees. Encourage them to share any frustrations. If it takes more than a minute to explain how to use your portal, you need to consider changing tools.

**IS THE PORTAL EASY TO USE WITHOUT TRAINING?**

**WILL INVESTORS BE ABLE TO FIND WHAT THEY ARE LOOKING FOR QUICKLY?**

**IS THE PORTAL'S INTERFACE WELL-DESIGNED AND ATTRACTIVE?**



# 5. Encourage and Measure Success

Changing habits takes time. Investors, and more importantly, your team will quickly fallback on old habits if you let them. Don't let that happen. The portal is an important tool in your investor relations toolkit and your team needs to be in sales pitch mode during the first 6-12 months of roll out. Consider marketing the portal the same way you would market your funds. Provide reminders, updates, and a clear statement of the value proposition to your investors.

Give some thought to your most effective communication option (Email? Phone call? Teams or Zoom meeting? A formal written resource?)

Then use this channel to educate your users about exactly how they can benefit from using your portal.

Once you launch, your portal should allow you to easily track and measure investor behavior. How many investors have been given credentials? How many have their activated credentials? How many have logged in during the past 1-2-3 months? What documents are they downloading? What URL's are they clicking on? Did they download any forms? Have they completed those forms? Did they change any of their personal data or preferences?

Developing a strong portal doesn't always mean that your target audience will flock to it.

As with any new piece of technology, it can be a real challenge to get portal users to engage deeply in the early days of roll out. It is up to you to solicit feedback and seek continual improvement. The rewards will be happier, more engaged investors and internal stakeholders.

And one last thought. Having your portal integrated with your CRM tool is a really important consideration. The portal must not create another investor data silo. Everything that your investor sees should be readily available to every internal stakeholder.

## Easily Track and Measure Investor Behavior:



HOW MANY INVESTORS HAVE BEEN GIVEN CREDENTIALS?



HOW MANY HAVE THEIR ACTIVATED CREDENTIALS?



HOW MANY HAVE LOGGED IN DURING THE PAST 1-2-3 MONTHS?



WHAT DOCUMENTS ARE THEY DOWNLOADING?



WHAT URL'S ARE THEY CLICKING ON?



DID THEY DOWNLOAD ANY FORMS?



HAVE THEY COMPLETED THOSE FORMS?



DID THEY CHANGE ANY OF THEIR PERSONAL DATA OR PREFERENCES?



The logo consists of a stylized white icon on the left, resembling a circular arrow or a shield with a diagonal line, followed by the text "SATUIT TECHNOLOGIES" in a bold, white, sans-serif font.

# SATUIT TECHNOLOGIES

For three decades, Satuit has stood out as a leader in asset management solutions, offering robust CRM and reporting software tailored to the specific needs of the finance sector.

Affordable yet highly effective, our solutions come at a fixed price while driving operational efficiencies, compliance, and improved outcomes in sales and client relations. And with implementations achievable in nearly half the time compared to other vendors, we ensure that your transition is both smooth and timely.

Contact us to learn more.