



The Value Proposition of an Investor Portal

The logo for SATUIT TECHNOLOGIES is centered in a blue rounded rectangle. It features a stylized 'S' icon to the left of the text 'SATUIT TECHNOLOGIES' in a bold, white, sans-serif font.

SATUIT TECHNOLOGIES

Consider adopting a portal or upgrading your existing portal, look for a solution that provides substantial value-added benefits to your investors.



Streamline Investor Reporting

Many asset management firms have adopted, or are considering adopting, an investor portal to streamline investor report delivery. Investor Portal software may be an add-on function of investor reporting software. Client managers upload reports after review and that is often the end of the process. The same client managers also email these reports to clients because the client see little value in logging in to the portal to download reports. Client adoption is typically low because your portal is not providing the value investors seek.

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 marketing efforts.

Have you also considered that if you are asking your investor to log into your portal site, you may want to offer them more incentive than the ability to view and download their monthly/quarterly statements? If a report depository is all you offer your investor, he or she will likely continue to request you email the report.



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



ALLOWS INVESTORS TO MANAGE THEIR PERSONAL DATA

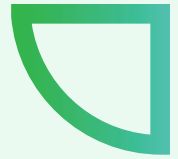


MOBILE-FRIENDLY



AND YOUR FIRM'S OPERATIONAL EFFICIENCY!





Driving Investor Engagement

When client portal adoption is low, it's typically because you're not providing the value investors seek. If that's the case, your portal is suffering a "failure to launch."

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.



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 an email is “delivered” when it is actually sitting in the recipient’s junk folder. That “90% delivered” statistic 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 up-selling 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 up-sell and to further engage your investor?

The Luddites among us don't have a Facebook Page, but most of your investors are fully comfortable with the digital experience. When you implement a full featured investor portal, you create an added vertical of marketing outreach. So long as you do this smartly, you have the chance to grow your accounts.

If you are working with advisors, another crucial value of the investor portal is to provide them with upto-date fund materials and financial information such as AUM and performance data.

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. However, these tools are typically limited to your

fund operations team and provide reporting to investors on current funds. Relationship managers and marketing may have little or no access to this key source of client communications.

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.



The logo consists of a stylized white icon on the left, resembling a circular arrow or a 'G' shape, 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.