



## **VENATOR CAPITAL MANAGEMENT**

**Learn How Venator Capital  
Management Streamlined  
Investor Management with  
SatuitCRM.**

# **CASE STUDY**

 **SATUITTECHNOLOGIES**



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# VENATOR CAPITAL MANAGEMENT

## ABOUT

Venator Capital Management Ltd., founded in 2005 and based in Toronto, Canada, is a leading investment firm specializing in uncovering opportunities across North America. Their bottom-up investment approach allows them to identify and invest in undervalued and under-followed businesses, leveraging deep research to make informed investment decisions. Registered as a Portfolio Manager, Investment Fund Manager, and Exempt Market Dealer, Venator works to achieve excellent returns for their clients through their equity long/short and fixed income funds.

After transitioning from their previous investor portal solution, Venator Capital Management adopted SatuitCRM and has been using the platform for a year, which in turn has successfully enhanced their operational efficiency and client management processes.



# CHALLENGE

Before engaging SatuitCRM, Venator Capital Management was utilizing a platform that was ultimately sunsetted. One of the most pressing issues they were experiencing with this platform was its inability to meet Venator Capital Management's security standards. Critical requirements like two-factor authentication were not part of the previous solution's feature set and were not expected to be implemented anytime soon. For an investment firm that prioritizes security and compliance, this presented a substantial challenge.

These limitations, combined with the platform's shifting focus, highlighted the need for a more robust and forward-thinking solution. This ultimately led Venator to transition to SatuitCRM, a platform better aligned with their requirements and future goals.

# APPROACH

Venator Capital Management found an ideal partner in SatuitCRM to address their core challenges and elevate their client experience. Security, which had been a significant concern, is no longer an issue thanks to SatuitCRM's robust features and infrastructure, including two-factor authentication.

The platform's flexibility and robust security have redefined how Venator Capital Management operates, providing them with a unified solution to manage client data, marketing efforts, prospective leads, and customer relationships. Without SatuitCRM, the risks of sharing sensitive information through less secure methods, such as email, could expose the firm to reputational damage and client distrust.

Fortunately, SatuitCRM centralizes operations within a secure environment, thereby ensuring that private and highly sensitive information, including PPI, is handled securely. This not only protects Venator's reputation but also reinforces client confidence in their commitment to safeguarding data.

SatuitCRM allows Venator Capital Management to present information to their clients in a highly customizable way. Recognizing that each client has unique requirements, the platform enables easy data segmentation and tailored information sharing. This enhanced control has given Venator the ability to meet diverse client and third-party needs with precision while maintaining a streamlined workflow.



# ONBOARDING & TRAINING

With their previous platform set to shut down, the Venator Capital Management team was under pressure to transition quickly. Thanks to the dedicated support from Satuit's team, however, they were fully up and running within just 6-8 weeks. Satuit provided consistent guidance through weekly meetings, always promptly addressing any questions or concerns, which made the process seamless and stress-free.

To further ensure success, Venator leveraged Satuit's courtesy weekly training sessions, which they found to be incredibly valuable. These sessions provided clear, practical information that helped their team get up to speed and maximize the platform's features. Venator Capital Management highly recommends these training sessions for any new users looking to hit the ground running with SatuitCRM.



# OUTCOME

Venator Capital Management has seamlessly integrated SatuitCRM into their operations, utilizing its powerful features to support both client and administrative tasks. Here's a breakdown of their day-to-day use of the investor portal and CRM:

## Client Support

- Supporting 450 unique clients across 600 total accounts.
- Providing 24/7 access to essential documents like tax slips and quarterly statements.
- Logging in to assist clients with finding specific account information.

## Data Management

- Performing monthly uploads of account data, ensuring clients have the latest information on their investments.

## Consolidated Account Views

- Simplifying account management with comprehensive summaries.
- Eliminating the need to manually address individual accounts through administrators.
- Enabling multi-account views for improved efficiency.



**450**  
unique clients



**600**  
total accounts

# FUTURE PLANS

**Portal Segmentation:** The team has plans to customize portal views to better cater to individual client needs, encouraging broader client adoption.

**Mailchimp Integration:** There is an intent to connect Mailchimp to SatuitCRM to host their monthly newsletter directly on the platform.

**Role-Based Views:** The creation of segmented views specific to current and prospective clients, as well as approved third parties like accountants lawyers, to further improve customization and efficiency.

## Integration and Communication Enhancements

**Mailchimp Integration:** Venator Capital Management intends on integrating Mailchimp with SatuitCRM to host and manage their monthly newsletter directly on the portal, streamlining client communication efforts.

## Segmentation and Role-Based Views

**Custom Views for User Roles:** Venator Capital Management aims to evaluate and implement segmented views for different user groups, including clients, third parties, and potential investors. This segmentation will allow tailored access to information based on roles and enhance efficiency and personalization.

## New Features and Tools

**DocuSign Integration:** Introducing DocuSign into their workflow is another feature the team is keen to explore, simplifying the document signing process for clients and administrators alike.

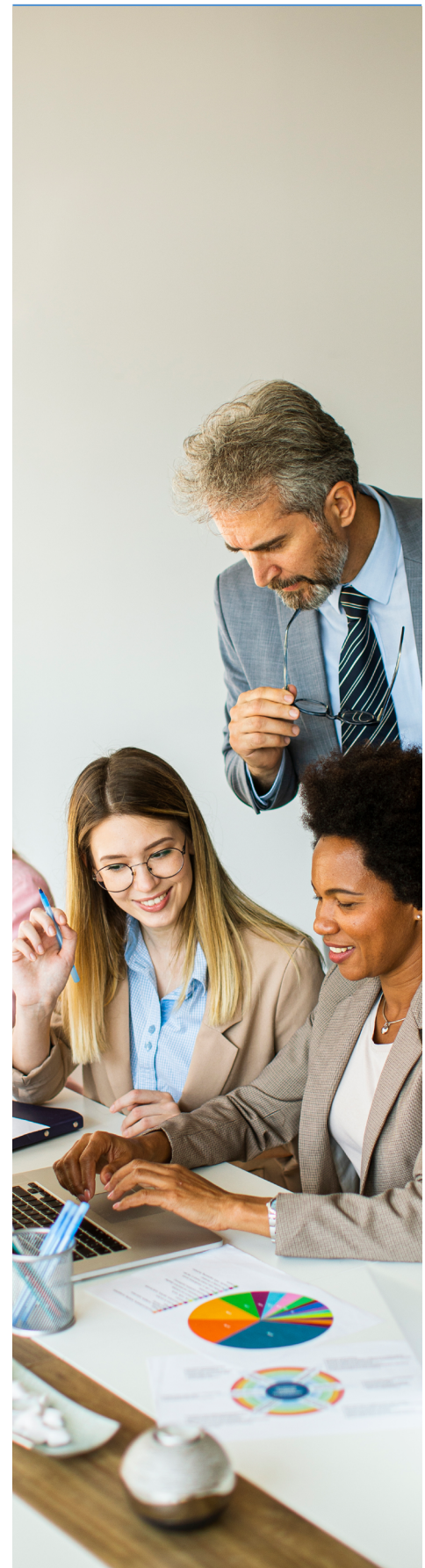
**Prospects Side of SatuitCRM:** Venturing into the prospects side of the platform is a priority for the company, so the plan is to focus more on growth opportunities while continuing to support current customers effectively.

## Enhanced Reporting and Visibility

**Reporting Features:** Venator Capital Management is looking to fully leverage SatuitCRM's reporting capabilities. These tools will empower them to analyze data, track performance, and make more informed decisions about their business strategies.

## Total Customer Experience Control

**Synergy Between CRM and Portal:** The company aims to leverage the strategic advantage of combining the CRM platform with the portal. As a result, these tools will enable them to deliver a seamless, fully controlled customer experience at every touchpoint.



# DOES VENATOR CAPITAL MANAGEMENT RECOMMEND SATUITCRM?

Venator Capital Management would absolutely recommend SatuitCRM. The platform's ease of implementation and the exceptional support from Satuit's staff have contributed to the overall success of the company. Moreover, SatuitCRM offers unmatched flexibility with regard to configurability that helps to future-proof the system and ensure that the company's growth and diversification of services can still be supported. Finally, the CRM does exactly what they need while giving them control over fields and information, a stark contrast to the limitations they faced with previous systems.

The ease of getting started with SatuitCRM has been one of the standout benefits, as it allowed their team to hit the ground running. They look forward to continuing to leverage the platform to communicate effectively with their clients and further enhance their investment management operations.

## Favorite Features



**2-Factor Authentication**



**Mailchimp and  
DocuSign Integrations**



**View Segmenting**



**6-8 Week**  
total onboarding time



**450**  
unique clients using SatuitCRM



**600**  
total accounts



**Satuit will grow  
with us and we will  
grow with Satuit.**



To learn more about our  
award-winning solutions,  
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