



## GATEWAY INVESTMENT ADVISERS

Discover how Gateway Investment Advisers, LLC (Gateway) enhanced compliance, streamlined operations, and built a foundation for future success with Satuit's scalable CRM platform for investors.

# CASE STUDY

 SATUIT TECHNOLOGIES



Phone : 781-871-7788

Mail : [sales@satuit.com](mailto:sales@satuit.com)

Web : [www.satuit.com](http://www.satuit.com)

# CONTENTS

About .....3  
Challenges Solved by Satuit .....4  
Gateway’s Biggest Satuit Wins .....5  
How Gateway Uses Satuit .....6  
Future Plans .....6  
Conclusion .....7





## **GATEWAY INVESTMENT ADVISERS**

# **ABOUT**

Since its founding in 1977, Gateway has built a reputation for managing complex market exposures. The firm's strategies can generate cash flow, reduce risk, and enhance long-term returns through broad-based or single-stock hedging & monetization and can also support tax-efficient risk management and diversification through long/short extensions. Gateway's solutions have the ability to enhance equity portfolios, diversify fixed income portfolios, and offer a transparent component to client's allocation to alternatives.

Gateway adopted Satuit CRM in 2017, and since then, they've empowered 21 team members across various departments with an industry-specific CRM solution to streamline operations and drive client success.



# CHALLENGES SOLVED BY SATUIT

Before partnering with Satuit, Gateway faced several operational hurdles. They needed a robust system to solve both business tracking and compliance requirements, specifically for monitoring communications and the materials sent to clients.

Satuit delivered a comprehensive solution that extended beyond basic compliance, introducing a client portal and configurable features. The application's ability to create tailored forms and dashboards provided different teams with quick, relevant information, streamlining onboarding and business reporting.

As Gateway's needs evolved, Satuit CRM's flexibility also proved essential for managing their sales pipeline and opportunities with greater hands-on control.

# GATEWAY'S BIGGEST WINS WITH SATUIT

Gateway has achieved significant successes since implementing Satuit CRM, particularly in compliance and operational efficiency. The platform delivered immediate wins in compliance tracking and account restriction management, which were primary drivers for its adoption. The firm now uses the Outlook add-in to capture all communications, contracts, and account restrictions, providing the compliance team with robust audit trailing capabilities.

Beyond compliance, their marketing team has leveraged the system to identify trends and flows in assets and advisors, enabling them to engage the sales team with more targeted leads. Furthermore, the early implementation of the client portal has proven to be a critical strategic decision, providing a scalable foundation to support the firm's continued growth.



## A Dedicated Customer Support Team

Finally, Satuit's dedicated and proactive service team has helped Gateway's staff tremendously. Their in-person training sessions in Boston, as well as the team's willingness to tackle complex scenarios and take on heavy workloads, have been paramount to their success with the CRM.

The help desk provides reliable support with a personal touch, ensuring there is always a familiar and knowledgeable contact available. Long-term relationships with Satuit team members like Jamie, Travis, and Lisa have been especially important, offering meaningful continuity and expertise that Gateway deeply appreciates.



# HOW GATEWAY USES SATUIT TODAY

Gateway is currently in a transitional phase, evolving from basic users to leveraging the platform as a true, firm-wide CRM tool. Today, various teams rely on the platform for critical daily and monthly activities, such as:

## Operations and Compliance

- Teams use Satuit for core functions like setting up new accounts, closing lost accounts, and managing all client account data in one central location. Capabilities like record-keeping and activity tracking are paramount for ensuring regulatory adherence.

## Marketing and Sales

- The marketing team logs business activities, including client and prospect calls, to track strategies and identify solutions for specific investment situations.

## Client Communication

- The client portal serves as a vital communication line, allowing the firm to share statement reports, invoicing, performance data, and AUM figures directly with clients.

## Integrations

- Gateway has successfully integrated DocuSign with Satuit, streamlining the setup of investment management agreements for the compliance team.

## Gateway's Future Plans for Leveraging SatuitCRM

Looking ahead, Gateway plans to deepen its use of the platform to support its growth. The firm is focused on expanding involvement for more teams and leverage the full range of dynamic Satuit features.

Future plans include implementing robust pipeline and opportunity tracking as well as making dashboards a key feature for at-a-glance insights.

# DOES GATEWAY INVESTMENT ADVISERS RECOMMEND SATUITCRM?

Gateway Investment Advisers recommends Satuit, citing the outstanding service and partnership they have experienced. The platform has consistently met their evolving needs, supported their growth objectives, and served their day-to-day operational and compliance requirements.

The partnership between Gateway Investment Advisers and Satuit has delivered significant value, bolstering the firm's approach to compliance, operations, and client management. By leveraging Satuit's robust and customizable platform, Gateway has streamlined its processes, enhanced its compliance capabilities, and laid a scalable foundation for future success.

As the firm continues to grow, Satuit stands as a trusted partner, ready to support its evolving needs and help drive its strategic objectives forward.

## Favorite Features



Record keeping



Activity tracking



Client account data management



**48 Years**  
in business



**8 Years**  
a customer



**20**  
licenses



**“A CRM is a CRM but the people who manage it make the biggest difference.”**



To learn more about our award-winning solutions, visit [www.satuit.com](http://www.satuit.com) or email [sales@satuit.com](mailto:sales@satuit.com)