SATUIT TECHNOLOGIES

Investor Lifecycle

Improve Your Investor Lifecycle by Tailoring Your CRM

How Satuit's Professional Services Team Helps Buy-Side Firms Maximize CRM Value Across Every Stage of the Client Journey

For buy-side investment management firms, a CRM platform is only as powerful as the processes, configurations, and integrations built around it. While most firms adopt a CRM to manage contacts and log activities, very few leverage the full spectrum of capabilities that a well-tailored system can provide, from intelligent prospect identification through seamless investor onboarding to proactive relationship management and retention.

Firms that invest in CRM customization and integration consistently report reduced operational overhead, improved data visibility, and stronger investor retention, without needing additional software licenses.

This whitepaper outlines the Buy-Side Client Lifecycle framework and the Satuit Maturity Model. It explores how buy-side firms can work with Satuit's Professional Services team to customize, integrate, and optimize their CRM environment to drive AUM growth, improve operational efficiency, and deliver a superior investor experience at every stage of the relationship.

Mastering the Buy-Side Client Lifecycle

The investment management industry is undergoing rapid transformation. Investor expectations are rising, regulatory requirements are expanding, and the volume of data flowing through operations is growing exponentially. In this environment, a CRM system configured for generic sales use cases is no longer sufficient.

Satuit Technologies has spent years working alongside asset managers, hedge funds, private equity firms, and wealth managers to understand the unique challenges of the buy-side investor lifecycle. The result is a structured, stage-by-stage framework that maps CRM capabilities to real business outcomes and a Professional Services team that can help firms achieve them.

This whitepaper walks through each of the six core stages of the Buy-Side Client Lifecycle, the common challenges firms face at each stage, and the specific ways Satuit's Professional Services team can help firms move up the maturity curve.

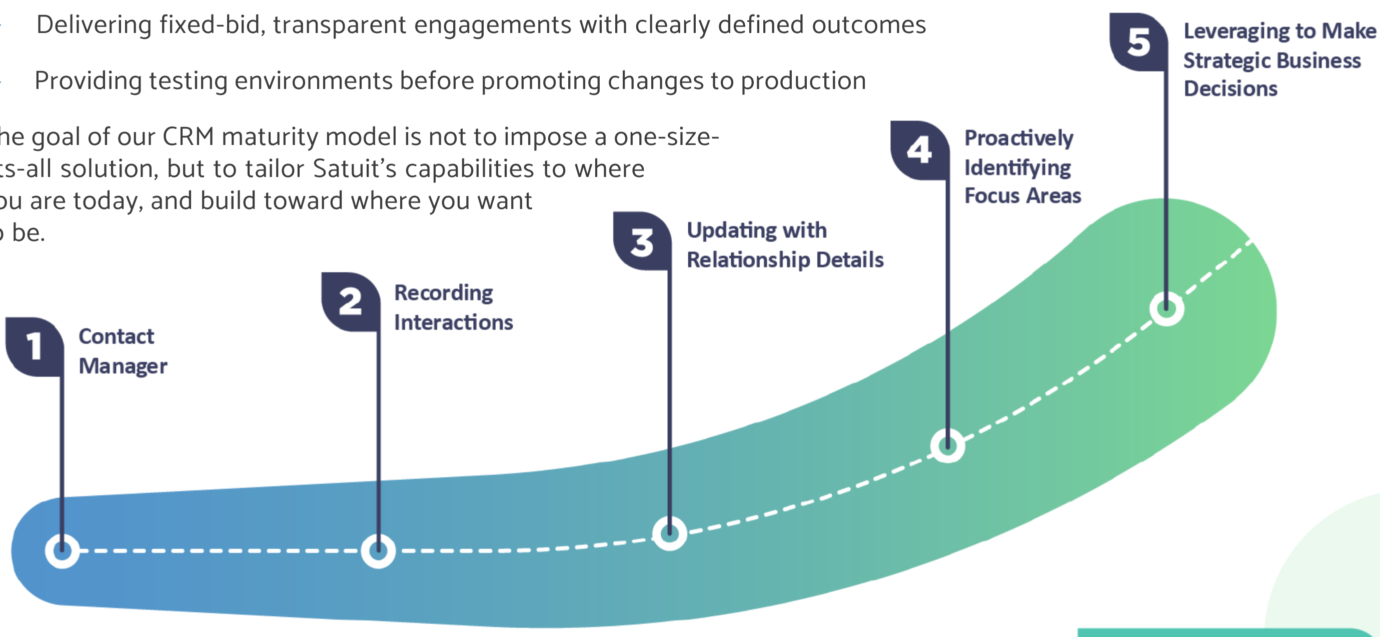
The Satuit Maturity Model

Central to Satuit's advisory approach is the Satuit Maturity Model, a framework that helps firms assess where they currently stand in terms of CRM adoption and sophistication, and identify clear pathways to improvement. The model recognizes that not every firm is at the same place in its CRM journey, and that progress is iterative.

The maturity model spans from basic data entry and manual processes at one end, to fully automated, AI-augmented, and deeply integrated systems at the other. Satuit's Professional Services team acts as a guide and builder, helping firms advance through each level by:

- Assessing current workflows and identifying inefficiencies
- Designing solutions tailored to the firm's specific investor lifecycle
- Building custom configurations, dashboards, database triggers, and integrations
- Delivering fixed-bid, transparent engagements with clearly defined outcomes
- Providing testing environments before promoting changes to production

The goal of our CRM maturity model is not to impose a one-size-fits-all solution, but to tailor Satuit's capabilities to where you are today, and build toward where you want to be.



Stage 1: Prospect Identification & Pipeline Building

The Challenge

Every investor relationship begins with prospect identification. For buy-side firms, this involves not only entering contacts and companies into the CRM but also systematically targeting them by geography, product type, AUM size, market segment, and other criteria. Without the right tools and processes in place, this stage is time-consuming, error-prone, and difficult to scale.

Common challenges at this stage include:

- Manual data entry from disparate sources such as conferences, referrals, and purchased lists
- Difficulty segmenting prospects to prioritize outreach effectively
- Lack of visibility into territory coverage and open market opportunities
- Disconnected data providers requiring separate logins and manual reconciliation

How Satuit Professional Services Can Help

Satuit's team offers a range of services to help firms build a stronger, more scalable prospect pipeline:

Data Import & Third-Party Integration

Whether a firm is migrating from a legacy system, importing conference attendee lists, or purchasing data from a third-party provider, Satuit can configure one-time or recurring data imports directly into the CRM. The team has also built integrations with major data providers, such as the Dakota Marketplace, allowing users to search for contacts and import them into Satuit with just a click or two. Similar integrations can be built for other preferred data providers.

Territory Coverage Dashboards

Custom dashboards and reports help sales teams visualize where they have coverage, identify whitespace, and track which prospects have been contacted. These tools are configurable by region, product, investor type, or any other dimension meaningful to the firm.

AI-Powered Data Research

An emerging area of interest among Satuit clients is the use of AI tools to query, analyze, and surface insights from the data already inside the CRM. Satuit's Professional Services team can help configure these capabilities to make prospect research faster and more intelligent.

Stage 2: Initial Outreach & Communication

The Challenge

Once prospects are identified, the next challenge is consistent, trackable, and effective outreach. This includes managing mass email campaigns, conference interactions, consultant relationships, phone calls, and appointments, while maintaining a complete record of every touchpoint in the CRM.

Key challenges include:

- Coordinating outreach across email marketing platforms, conferences, and third-party marketers
- Tracking email engagement metrics such as open rates, click-throughs, and unsubscribes
- Ensuring territory coverage is complete and measurable
- Following consistent best-practice workflows for prospect communications

How Satuit Professional Services Can Help

Email Marketing Integrations

Satuit supports pre-built integrations with leading email marketing tools including ProFundCom, ActOn, Constant Contact, MailChimp, and DotDigital. For firms using additional tools such as Marketo, or working with third-party marketing agencies, the Professional Services team can build custom two-way integrations, pushing CRM contacts to the marketing platform and pulling engagement data back into Satuit.

Conference & Event Data Management

Following conferences and trade shows, firms can import attendee data and interaction records directly into the CRM. This ensures that leads generated at events are systematically followed up and not lost in spreadsheets or personal inboxes.

AI-Assisted Communication

Satuit is developing capabilities for AI-assisted sentiment analysis and email drafting. Using AI tools integrated with the CRM, firms will be able to assess communication patterns, identify investors who may be disengaging, and draft personalized outreach at scale.

Workflow & Configuration Optimization

Our Professional Services team helps firms configure form rules, workflow triggers, and system settings to ensure that communication processes follow both Satuit best practices and the firm's own internal standards. This includes automating follow-up tasks, enforcing data quality rules, and streamlining the outreach workflow.

Stage 3: Sales Pipeline Management

The Challenge

As prospects move through the pipeline, firms need robust tools to forecast, report, and manage opportunities. The stakes are high: poor pipeline visibility can lead to missed targets, resource misallocation, and lost AUM. This stage also involves significant documentation, due diligence questionnaires, RFIs, contract negotiations, and investor portal interactions.

Common challenges include:

- Generating accurate and timely pipeline reports for internal stakeholders and third parties
- Tracking weighted probabilities and AUM targets across a diverse opportunity set
- Managing and auto-populating due diligence questionnaires and RFIs
- Sharing documents and information securely through investor portals
- Benchmarking current pipeline performance against historical data

How Satuit Professional Services Can Help

Pipeline Dashboards & Reporting

Satuit's Professional Services team builds custom pipeline dashboards tailored to each firm's reporting needs, by fund, by geography, by investor type, or by relationship manager. These dashboards provide real-time visibility into where opportunities stand and how likely they are to close.

Data Warehouse Integration

For firms that require trend analysis and historical comparison, Satuit can export data to local data warehouses. This enables questions like "How does my current pipeline compare to this time last year?" to be answered with confidence.

Database Triggers & Weighted Scoring

Database triggers can be configured to automatically calculate weighted probabilities, flag at-risk opportunities, and update AUM targets as pipeline conditions change. This reduces manual calculation and ensures that leadership always has an accurate, up-to-date view of the sales pipeline.

Seismic & Content Management Integration

Satuit has built integrations with Seismic and similar sales enablement platforms, enabling firms to automatically populate presentations and collateral with CRM data, and push information from Seismic back into Satuit for a complete record.

AI for RFI & DDQ Automation

Looking ahead, Satuit is developing AI-powered tools to automatically populate RFIs and due diligence questionnaires based on data stored in the CRM. This capability, currently in development, has the potential to dramatically reduce the time spent on these document-heavy processes.

Custom Prospect Portals

Satuit can create custom portal views designed specifically for prospects, giving them a curated experience while keeping all interactions trackable within the CRM.

Stage 4: Investor Onboarding

The Challenge

Closing a new investor is only the beginning. The onboarding process is complex, multi-party, and time-sensitive. Firms must manage KYC/AML documentation, wire instructions, account setup across multiple systems, fee schedule configuration, benchmark confirmations, and reporting preferences, all within the first weeks of the relationship.

Without structured workflows and system automation, onboarding becomes a bottleneck, creating a poor first impression with investors and increasing the risk of compliance and operational errors.

How Satuit Professional Services Can Help

Automated Onboarding Workflows

When an opportunity is marked as won, Satuit can automatically trigger a series of onboarding tasks, assign them to the appropriate team members, and send reminders as deadlines approach. This ensures nothing falls through the cracks during the critical first weeks of the investor relationship.

System Integration for Account Creation

Satuit's team has built integrations for numerous clients that automatically notify portfolio accounting systems when a new CRM account is created. This eliminates the need for duplicate data entry across systems and reduces the risk of errors.

Customized Investor Portal Experience

One of the most powerful features available to Satuit clients is the ability to create different portal views for investors at different stages of the lifecycle. A prospect sees one view; an investor in onboarding sees another; a fully onboarded investor sees a third. This tailored experience reinforces professionalism and ensures investors always see relevant, stage-appropriate information.

Reporting & Dashboard Support

Progress dashboards help onboarding teams track where each new investor stands in the process, which tasks are complete, and where there are outstanding items. Combined with automated reminders, this significantly reduces onboarding delays.

Stage 5: Investor Relations & Ongoing Management

The Challenge

Once an investor is onboarded, the work is far from over. Long-term investor retention requires consistent communication, proactive relationship management, and the ability to identify early warning signs of dissatisfaction or disengagement. Investor relations teams must also manage subscriptions and redemptions, track performance reporting preferences, handle SMA trade restrictions, and coordinate with consultants and third-party stakeholders.

How Satuit Professional Services Can Help

Risk Metric Database Triggers

Satuit can configure triggers that automatically flag risk indicators, such as a decline in AUM, a reduction in portal logins, or a gap in investor communications, so that relationship managers can take proactive action before a redemption becomes likely.

Portfolio Data Integration

By integrating data from portfolio accounting systems, custodians, and fund administrators directly into the CRM, Satuit gives investor relations teams a single view of each investor relationship. This integration can also reduce the number of portfolio accounting licenses needed for IR teams who only need read access to performance data, generating measurable cost savings.

Client Reporting & Packaging

Satuit's packaging tool enables firms to create comprehensive client reports drawing from multiple data sources. The Professional Services team can help configure these packages for delivery through the portal or directly to investors on a scheduled basis.

AI-Powered Risk Analytics

Satuit is exploring integrations that allow AI tools to query investor data, either through a Satuit Data Exchange export or via a native CRM integration, enabling more sophisticated risk analytics and early warning capabilities.

Document Management Integration

Several Satuit clients have integrated document management platforms such as Documentum into their CRM environment, allowing relationship managers to access and share documents directly from within Satuit rather than switching between systems.

Segmented Portal Views

Custom portal configurations allow firms to serve different types of investors, institutional asset owners, consultants, wealth managers, high-net-worth individuals, with tailored views that surface the most relevant information for each audience.

Client Engagement Monitoring

Satuit's own team uses the platform to monitor engagement with its own clients, automatically tracking when a client hasn't been contacted in a defined period, and scheduling annual business reviews. Similar workflows can be built for any client.

Stage 6: Investor Offboarding & Redemption Management

The Challenge

While no firm wants to lose investors, redemptions are an inevitable part of the business. Managing them professionally, with clear processes for redemption handling, loss analysis, root cause investigation, and final reporting, is essential both for operational integrity and for preserving the possibility of future re-engagement.

How Satuit Professional Services Can Help

- Configure workflows triggered by redemption events to initiate loss analysis and consultant outreach
- Automate the capture of final AUM values at account close for accurate trend reporting
- Build dashboards and reports tracking redemptions by fund, segment, geography, or relationship manager
- Export redemption data to data warehouses for longitudinal analysis and strategic review

Work with Satuit's Professional Services Team

Firms interested in engaging with Satuit's Professional Services team can expect a transparent, collaborative, and outcome-oriented process:

1. Discovery Conversation

The process begins with an introductory call with a Satuit client success representative. The goal of this conversation is to understand the firm's specific challenges, goals, and current CRM configuration. No commitment is required at this stage.

2. Proposal & Fixed-Bid Estimate

Following discovery, Satuit provides a written proposal outlining the scope of work, the specific deliverables, and a fixed-bid cost estimate. Clients know exactly what they are getting and what it will cost before any engagement begins.

3. Build & Test

Satuit builds the agreed solution in a test environment, allowing the client to review and approve changes before they are promoted to production. This ensures quality and gives firms full control over what goes into their live system.

4. Production Deployment & Review

Once approved, changes are deployed to production. Satuit remains available for follow-up questions and iterative improvements as the firm's needs evolve.

Follow the Process

Engagement timelines vary depending on complexity. Simple reports or database triggers may be completed in a matter of days, while comprehensive site reviews or multi-system integrations may take four to eight weeks from start to finish.

Key Themes & Takeaways

Several themes emerged consistently throughout the whitepaper that are worth highlighting for any firm evaluating its CRM strategy:

AI Is Becoming Central to CRM Strategy

From prospect research and territory analysis to sentiment monitoring, email drafting, and RFI automation, AI tools are increasingly relevant to every stage of the investor lifecycle. Satuit is actively building AI integrations and Professional Services engagements in this area are growing.

Integration Is the Force Multiplier

A CRM that is connected to a firm's data ecosystem, portfolio accounting systems, fund administrators, email marketing platforms, data providers, and document management tools, delivers dramatically more value than one used in isolation. Satuit's Professional Services team has built integrations across all of these categories.

The Portal Is an Underutilized Competitive Differentiator

Custom investor portals, segmented by investor type and lifecycle stage, represent a significant opportunity for firms to differentiate their investor experience. Yet many firms use only default portal configurations. Satuit can help firms build purpose-built portal views for every investor segment.

Automation Reduces Risk and Cost

Automated workflows for onboarding, relationship monitoring, redemption management, and reporting reduce reliance on manual processes, and with it, the risk of errors, delays, and missed follow-ups. Several Satuit clients have also reported measurable cost savings by reducing portfolio accounting licenses for IR team members who only need read access to performance data.

Technology Adoption Should Be Staged

The Satuit Maturity Model reflects the reality that no firm advances from basic CRM usage to full automation overnight. The most successful engagements are those where firms identify one or two high-impact areas to address first, gain confidence in the process, and then expand their ambitions over time.

Turn Your CRM Into a Buy-Side Growth Engine

The buy-side investor lifecycle is complex, multi-stage, and increasingly competitive. Firms that invest in tailoring their CRM environment to match each stage of that lifecycle, from prospect identification through investor retention and, when necessary, offboarding, are better positioned to grow AUM, reduce operational costs, and deliver the institutional-quality experience that today's investors expect.

Satuit's Professional Services team exists specifically to help firms make that investment effectively. With deep knowledge of the buy-side industry, a proven delivery methodology, and the technical expertise to build custom dashboards, workflows, integrations, and portal configurations, the team is a strategic partner for firms ready to move up the maturity curve.

Whether a firm is just beginning to explore what its CRM can do, or is ready to implement sophisticated AI-powered analytics and multi-system integrations, the Professional Services team can design and deliver the right solution, transparently, efficiently, and on budget.

To start the conversation, reach out to your Satuit Client Success Representative. An initial discovery call is the first step toward understanding what is possible and what it would take to get there.

About Satuit Technologies

Satuit Technologies provides purpose-built CRM software for the investment management industry, serving asset managers, hedge funds, private equity firms, wealth managers, and other buy-side institutions. Satuit's platform is designed to support the complete investor lifecycle, from prospect identification and outreach through onboarding, ongoing relationship management, and reporting.

Satuit's Professional Services team works with clients to configure, customize, and integrate the platform to meet the specific operational needs of each firm. Engagements range from targeted configuration projects to comprehensive system reviews and multi-system integrations.