

SatuitCRM vs Salesforce

Why investment managers stop customizing and start closing

Salesforce ships with generic objects, Leads, Contacts, and Accounts, built for any industry. For investment managers, that means someone has to build LP relationships, AML/KYC compliance, consultant product ratings, and institutional reporting before a single rep can log a meeting. That work takes months and costs more than the license itself.

SatuitCRM is built for one industry only. It's a finished product, not a starting point.

What investment managers actually need, and who delivers it

	Salesforce	SatuitCRM
Capability		
Industry focus	Any industry	Investment management only
Client reporting (CRA)	Custom build required	Built in
Investor portal	Third-party integration	Built in
Consultant product rating tracking	Custom configuration	Built in
AML/KYC compliance tracking	Custom build required	Built in
RFP/RFI management	Plugin required	Built in
LP/institutional data model	Does not exist	Built in
Implementation timeline	12-18 months	2-8 weeks

The Hidden Cost of Salesforce

The license fee is just the beginning. Investment management firms typically layer on professional services to map workflows onto generic objects, AppExchange plugins for reporting and investor portals (each with separate licensing), and ongoing maintenance every time Salesforce updates its core platform. A heavily customized Salesforce instance also degrades adoption, when reps have to call a pension fund a "Lead" and an investor an "Account," data quality suffers.

Who SatuitCRM is built for

Institutional asset managers. Wealth management firms. Private equity. Hedge funds. Family offices. Fund distributors. Any investment management firm that wants a CRM that works from day one.

When total cost of ownership is calculated, licenses, plugins, professional services, maintenance, SatuitCRM is typically vastly more cost-effective. It's a finished solution. Salesforce is a toolkit. Talk to our team today to learn more.