SATUIT TECHNOLOGIES



CRM FEATURES YOU NEED IN 2027

Where Satuit's Core Features Have to Go Next

A feature-by-feature look at where each of SatuitCRM's real, in-market capabilities stands today and what has to change about it by 2027 to stay ahead of rising investor, compliance, and operational demands.

SATUIT TECHNOLOGIES

Table of Contents

Why 2027 Is a Different Bar 3
Why Industry-Specific Matters Most 3
1. Custom Dashboards 4
2. Team Communication 4
3. Client Engagement 4
4. Detailed Reporting 5
5. Document Management 5
6. Task and Activity Management 5
7. Outlook and Email Integration 6
8. Deal and Pipeline Management 6
9. Mobile 6
10. Open API 7
11. MCP and the AI Layer 7
How to Plan for This With Your Current CRM 8
Conclusion: Buy for Where the Bar Is Going 8
About Satuit Technologies 9

Why 2027 Is a Different Bar

Three forces are converging on buy-side firms at once. Investor and allocator expectations for transparency and speed are rising, regulatory scrutiny of recordkeeping is increasing, and IR and operations teams are being asked to cover more relationships without proportional headcount growth. A CRM that was adequate in 2023 is not automatically adequate heading into 2027, even if nothing about the platform itself has changed, because the bar it is being measured against has moved.

This ebook goes feature by feature through SatuitCRM's real, current capabilities and asks what has to change about each one to stay ahead of that moving bar. Every capability described here exists in the platform today. Nothing in this ebook describes a feature that does not yet exist.



Why Industry-Specific Matters Most

The CRM market is crowded with platforms that claim to serve financial services firms. Salesforce, HubSpot, and Microsoft Dynamics are powerful general-purpose tools, but general-purpose means exactly that: built to serve every industry, optimized for none.

When buy-side firms try to adapt a generic CRM platform to their needs, they run into the same recurring problems: endless customization projects and expensive consultants; systems that still do not capture the nuances of institutional investor relationships, wealth management, alternative investments, or private equity deal flow; AI features trained on generic sales data rather than buy-side workflows; no native integration with portfolio accounting, third-party data vendors, or industry-standard platforms; and vendor support teams with no financial services experience.

SatuitCRM is built to close those gaps directly. The platform comes pre-configured for institutional asset management, private equity, hedge funds, family offices, fund distribution, and wealth management, with workflows, reporting, and compliance tools that a generic platform requires months of customization to approximate. That is why every feature in this ebook is described the way it is: not as a generic capability adapted to finance, but as something built for the buy side from the start.

1. Custom Dashboards

Today, SatuitCRM lets users build custom dashboards and reports without engaging a developer or a professional services request, so management reporting is available from day one rather than after a configuration project. By 2027, a dashboard that only shows what a user asks to see is no longer enough. The next bar is a dashboard that surfaces what a user did not know to ask about: a consultant relationship going quiet, a report nobody has opened in three months, a compliance flag buried three clicks deep. Dashboards should also configure themselves sensibly by role, so a new relationship manager sees a useful view on day one instead of an empty template.

2. Team Communication

Today, SatuitCRM keeps sales, marketing, and investor relations working from the same relationship record, breaking down the data silos that form when each team keeps its own notes.

By 2027, that shared record needs to keep working as headcount stays flat and relationship volume grows. The teams already on one system are the teams best positioned to absorb more relationships without adding staff, provided the record stays current and every team keeps using it consistently rather than drifting back to side channels.

3. Client Engagement

Today, SatuitCRM tracks every touchpoint, meeting, and campaign interaction tied to a relationship, so engagement history is not scattered across individual inboxes.

By 2027, firms will need to use that history more deliberately: reviewing it to spot a relationship that has gone quiet, or one that is being contacted so often it risks fatigue. The data to support both is already being captured. What changes by 2027 is how consistently teams are expected to act on it.

4. Detailed Reporting

Today, SatuitCRA generates compliance-ready reports on a schedule, and users can build the reports they need without a developer, a capability already covered in Satuit's blog series on reporting tools.

By 2027, the pressure on reporting is coming from the investor side. CSC Global's January 2026 survey found that roughly three-quarters of LPs now want performance data delivered daily or on demand, not on a quarterly cycle, and Copia Wealth Studios' August 2025 survey of European LPs found that 78% would completely withdraw from investments with poor reporting performance. A reporting engine that can already be configured without a developer is the right foundation for firms trying to close that gap; the work by 2027 is using it to shorten reporting cycles, not waiting for the next audit or LP request to reveal a gap.



5. Document Management

Today, SatuitCRM stores, organizes, and delivers fund materials from a centralized document library tied to each relationship record.

By 2027, the volume of materials firms manage this way will keep growing, and the discipline that matters most is consistent use: making sure every fund document actually lands in the shared library instead of a personal drive, so the retention, access, and audit benefits of centralization are not undermined by a handful of documents that never made it in.

6. Task and Activity Management

Today, SatuitCRM's task and activity tools keep IR teams accountable at scale, with automated workflow triggers that create tasks and reminders so nothing depends on memory alone.

By 2027, the standard for accountability is likely to get stricter, not looser. The 2026 Investment Management Compliance Testing Survey (Investment Adviser Association, ACA Group, and Yuter Compliance Consulting; 411 firms, April to May 2026) found compliance topics generally under closer scrutiny than in prior years. Firms that are already logging tasks and follow-ups systematically, rather than relying on individual memory, are the ones positioned to answer for that activity if asked.

7. Outlook and Email Integration

Today, SatuitCRM integrates natively with Outlook and Gmail, automatically capturing and linking correspondence to the right relationship record.

By 2027, that captured correspondence becomes more valuable, not less, since it is the record a firm would rely on to reconstruct a relationship's history during an audit, a dispute, or simply a staff transition. The value of this feature by 2027 comes from consistent use today: every relationship manager actually working through the integrated inbox rather than a personal one.

8. Deal and Pipeline Management

Today, SatuitCRM supports the full private equity deal lifecycle from sourcing through close, centralizing deal financials, EBITDA, and terms in one place instead of a separate spreadsheet per deal.

By 2027, LP expectations around reporting are rising at the same time deal complexity is increasing, with 88% of LPs in Adams Street Partners' March 2025 survey planning to increase co-investment allocations, a trend that adds more parties and more reporting lines to track per deal. A single, centralized pipeline record is the foundation for handling that complexity without it becoming unmanageable across spreadsheets.

9. Mobile

Today, Satuit2GO gives relationship managers mobile access to the platform while they are away from a desk, whether at a conference, on a due diligence trip, or in an in-person meeting.

By 2027, relationship managers will keep spending a meaningful share of their time away from a desk, which makes consistent mobile use, not just availability of the app, the differentiator between firms that walk into a meeting prepared and firms that do not.

10. Open API

Today, SatuitCRM connects to workflow automation platforms including Zapier and Pipedream, alongside its native integrations with portfolio accounting, custodial, and data provider systems, giving firms a way to connect tools that do not already have a built-in connector.

By 2027, this kind of openness stops being a nice-to-have. Firms are adding and swapping tools in their stack faster than any single vendor can build native integrations for all of them. A CRM with an open API is one a firm can keep extending on its own timeline; a closed platform turns every new tool into a request on someone else's roadmap.:

11. MCP and the AI Layer

Today, SatuitCRM's AI layer already supports relationship intelligence, automated workflow triggers, sales pipeline prioritization, and email and communication intelligence, and it exposes that data through a Model Context Protocol (MCP) connection, giving AI agents and assistants a secure, permissioned way to work with CRM data instead of relying on a workaround.

By 2027, MCP or a comparable protocol is likely to become the standard way software exposes its data to outside AI agents. Firms whose CRM vendor has already built this connection will be able to let their own AI tools work with client data on their terms, with the same access controls that govern everything else in the platform, rather than waiting for a vendor to catch up.



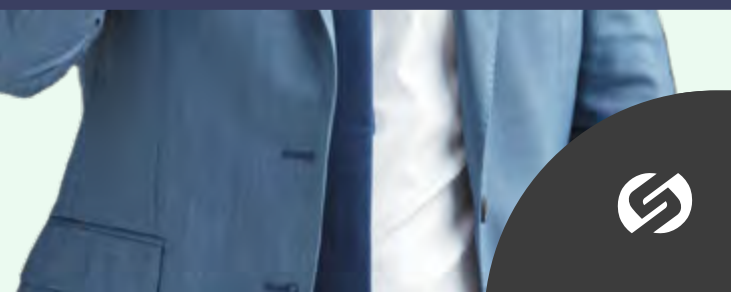
How to Plan for This With Your Current CRM

Every item above describes a capability SatuitCRM has today, not a future promise. The gap between having a capability and getting its full value by 2027 is almost always adoption and consistency, not missing functionality.

- Audit which of these areas your team is actually using consistently versus which have quietly reverted to spreadsheets, personal inboxes, or informal tracking
- Set a clear owner for each area (dashboards, document management, task accountability, API-connected tools, and so on) so consistent use does not depend on individual habit
- Revisit training annually, not just at implementation, since new hires are the most common source of drift back to old habits
- Ask your CRM vendor directly what is on their near-term roadmap for each of these areas, and be skeptical of any vendor promising a capability with no visible timeline



Book a demo at satuit.com



Conclusion: Buy for Where the Bar Is Going

The firms that will feel behind in 2027 are unlikely to be the ones missing some exotic feature. They are more likely to be the ones who never got full adoption out of the capabilities they already paid for, or who bought a generic platform never built for the buy side in the first place.

SatuitCRM's feature set, described above, is real and in production today, built specifically for institutional asset managers, private equity firms, hedge funds, family offices, wealth managers, and fund distribution teams. Getting ahead of 2027 is less about waiting for the next feature release and more about using what is already there consistently, across the whole team.

What Sets SatuitCRM Apart

- Custom dashboards, team communication, and client engagement tracking, all in production today, unifying sales, IR, and marketing on one relationship record
- SatuitCRA's compliance-ready reporting, buildable without a developer
- Centralized document management and task and activity tracking built for audit-ready accountability
- Native Outlook and Gmail integration, full private equity deal and pipeline management, and an open API for connecting the rest of your stack
- An AI layer with MCP support, and Satuit2GO mobile access for relationship managers working away from a desk

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.

satuit.com | 781-871-7788 | sales@satuit.com