

Overview

This established Silicon Valley player brought us Netflix, but when they needed help with SalesForce to manage their Investor Relations and Marketing, there was only one player with a proven track record to back it up; SteelBridge Consulting. With multiple funds raised and two more planned, this client needed more horsepower to help its Investor Relations team manage the meetings, materials, and tracking potential commitments as they traversed the world servicing existing LPs and signing up new ones.

Client Challenge

- Client had a great system but no set processes or tracking in place to make the most of the system
- SalesForce provides limited customer support, and has no private equity-specific tracking that can just be 'turned on'
- The IR team kept a multitude of different Excel schedules to track travel, communications, meetings, and other items
- The Finance team kept its own LP investor records and communications schedule
- No single point of entry made it likely for things to slip through the cracks with no one party responsible for the communication data or its management

SteelBridge Impact

- Drafted strategy to bring all the contact information into SalesForce from various Excel schedules
- Created workflows around all the repeating communications to existing and potential LPs
- Put processes in place to capture investor address changes and other notification changes
- Customized reports to generate investor heat maps to help cluster travel around geographical areas that generate the most new fund interest
- Trained staff in using the full system functionality with coaching on how to ensure data is entered and reported on correctly

Project Approach

Organize Existing LP Contact Info

Multiple account contacts needed to be organized and then grouped

Ensuring the right statements go to the correct contact



Captured Potential LP Information

Capturing notes from 'soft' meetings

Sending reminders and follow ups

Organizing due diligence information



Get Communications Right

Ensure all communications go to the right contact

Making sure that nothing slips through the gaps

Contact Us

James M. Haluszczak
Managing Partner

o: +1 646.737.7960

m: +1 302.438.5400

e: jhaluszczak@steelbridgeconsulting.com

Todd G. Haring
Partner

o: +1 646.737.7960

m: +1 215.704.4838

e: tharing@steelbridgeconsulting.com