

Success Story

IR Operational Improvement and Salesforce Implementation

SteelBridge

Overview

A Boston-based top 20 global private debt fund manager needed to improve their investor pipeline tracking and investor reporting. SteelBridge successfully enabled improvement through implementing Salesforce to provide a centralized repository of investor information, as well as standardizing collaboration methods and data sharing processes between the fund's IR team and the fund's LPs.

Client Challenge

- No single point of consolidated investor information – multiple layers of information in multiple systems
- Increased risk due to compliance and other investor-related reporting required vlookups and other manual processes
- K1's had been sent out incorrectly as a result of errors as simple as a wrong address
- Lack of data collection during the subscription process rendered KYC and AML rules enforcement difficult

SteelBridge Impact

- Implemented Salesforce to consolidate all investor information
- Defined IntraLinks requirements for improved internal collaboration and better management of the DDQ process
- Crafted business requirements for an external-facing LP web portal
- Executed enhancements to create data collection efficiencies during the subscription process
- Deployed EventBrite to manage conferences, invitations, participant tracking, as well as post conference surveys

Project Approach

Process

- Created business requirements documents to detail requirements
- Reduced risk of errors by streamlining processes into categories of likely events

Technology

- Collaborated with internal teams to assess and determine appropriate uses of technology
- Provided business expertise and industry knowledge during development

People

- Coordinated regular meetings with appropriate stakeholders to achieve completion of project goals
- Reviewed project milestones utilizing a detailed dashboard

Design

- Created increased functionality by drawing on best practices in CRM system design
- Designed workflow templates for high frequency items

Management

- Unlocked valuable time for the investor relations team
- Managed the software development and business analysis teams

Contact Us

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