



White Paper: Leverage Technology to Keep Fundraising Strong



In a dynamic landscape where economic shifts shape fundraising strategies, firms seasoned in navigating downturns are seizing opportunities to maintain investor engagement.

As we know, success in Private Capital Markets often hinges on a firm's ability to fundraise. Historically, the fundraising and investor communication process heavily relied on personal relationships and tight-knit networks. Where you could previously hang your hat on past relationships and handshakes, the tides are changing, and prior relationships are no longer a guarantee for re-ups.

Now, LPs are demanding more access to information, proactive communications, more detailed reporting, and the option for seamless self-service. With these increased expectations, it's putting more pressure on GPs to show and articulate why they are uniquely differentiated or worthy of LPs' capital.

With LPs seeking heightened access to information, transparent communication, and streamlined interactions with their GPs, **it's worth taking a closer look at the fundraising process to determine how you can best stand out and differentiate to LPs.**



Target The Right Investors

Focus on LPs and investors who fit a specific profile to quickly close the fund and generate the best returns.



Leverage Data For Creative Storytelling

Tell a compelling story to your investors. Use objective data to communicate your firm's track record, ongoing execution of the investment thesis, and other key points of differentiation.



Provide A Modern LP Experience

Redefine LP engagement with technology that offers seamless access to data, personalized insights, and streamlined communication channels.

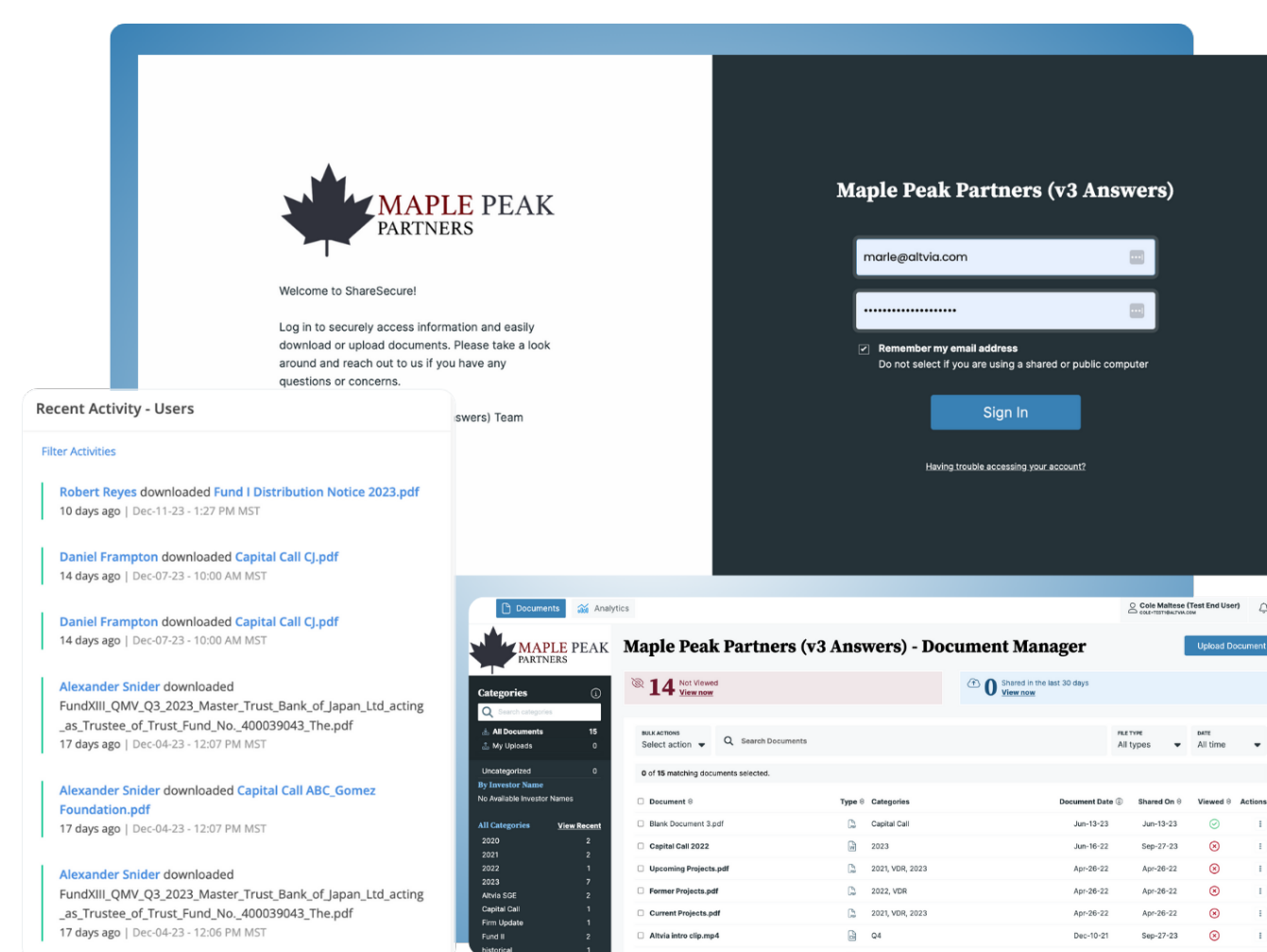
Differentiate to Your Investors

In today's competitive fundraising environment, it's important for GPs to understand how to effectively stand out to LPs.

1 Leverage an LP Portal | VDR

Leverage a powerful engagement portal to streamline communication and engagement with your LPs and investors. Having the ability to create, track, segment, and audit the documents that you provide investors will save you hours of work.

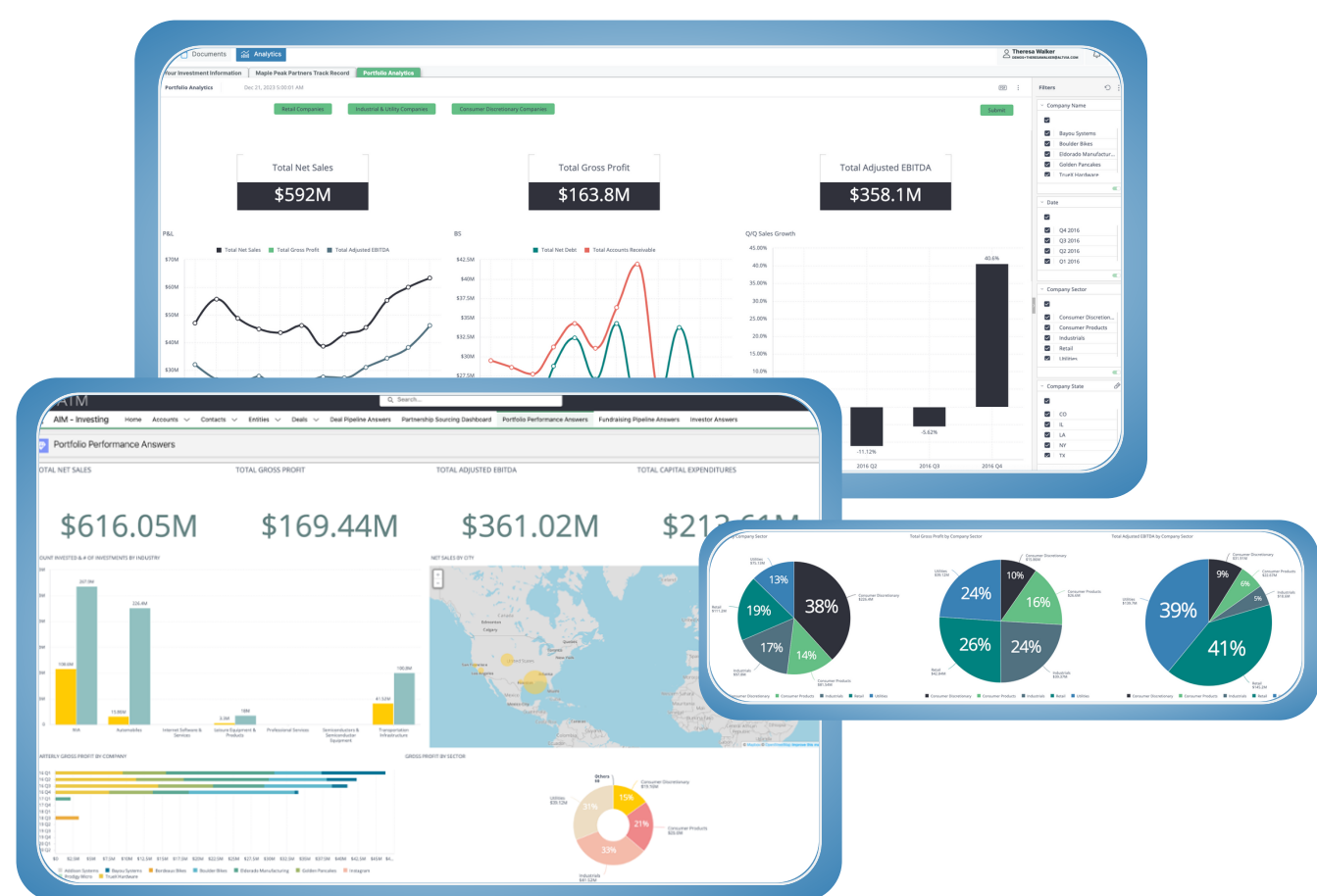
- Share sensitive documents, including multimedia files, such as videos, audio files, recorded webinars, etc, in an industry-leading portal that integrates with your CRM.
- Tailor information for specific teams and use cases with versatile “workspaces,” enhancing organization and data security.
- Customize user permissions and expiration dates to control proper access to documents.



2 Connect Your Data Sources

Leverage data to differentiate to LPs. The ability to utilize objective data to communicate your firm's past performance and ongoing execution of investments, sets you apart from the competition. By connecting disparate data sources, you will be able to find quick answers and empower LPs to self-serve.

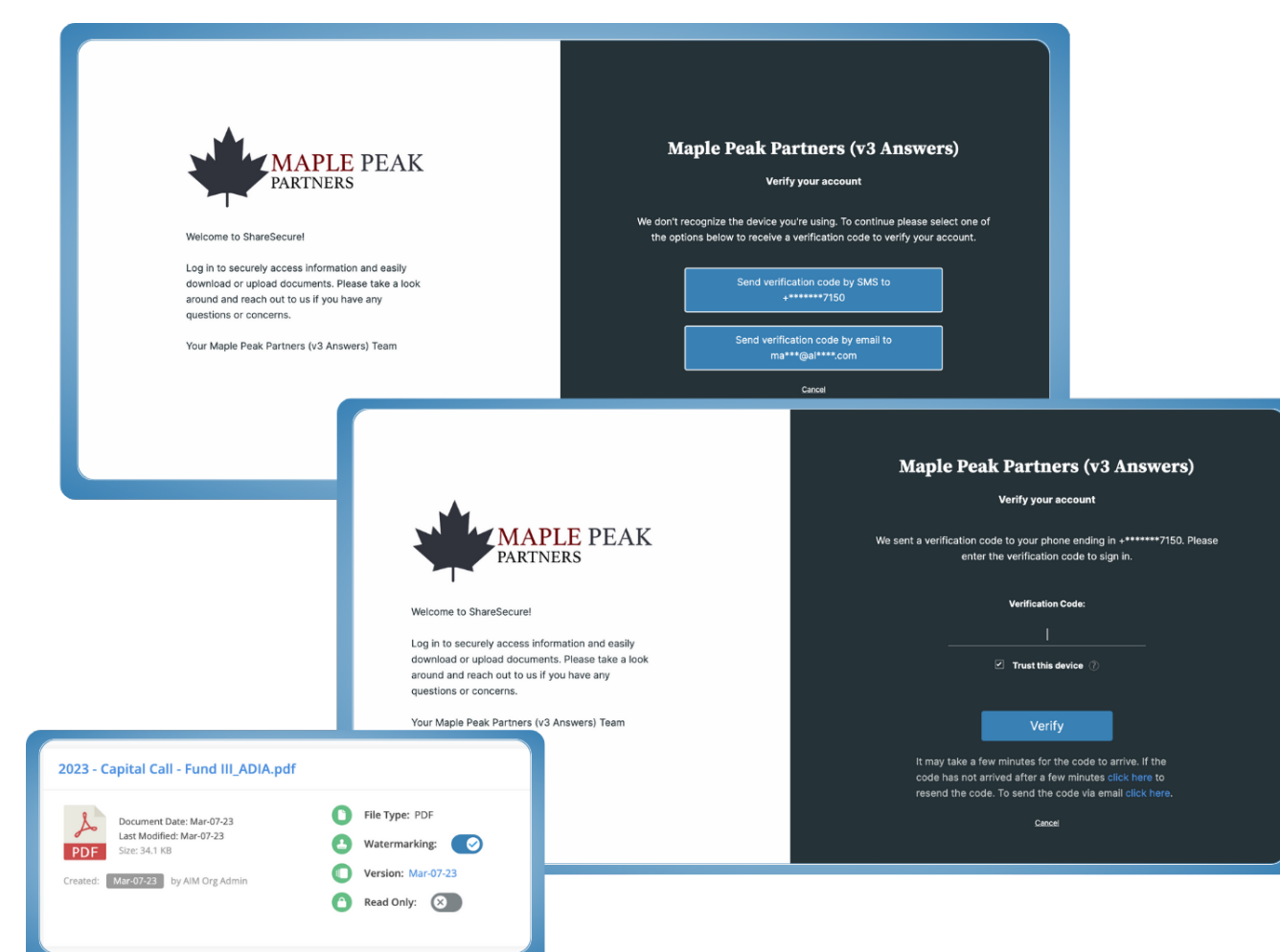
- Reduce one-off requests with an interactive dashboard, giving your LPs all the answers they're looking for.
- Embed dashboards right in your secure portal for optimal security.
- Create an interactive track record and differentiate your firm from the competition.



3 Keep Sensitive Data Safe

Share documents and store materials in an industry-leading, secure portal that integrates with your CRM. From two-factor authentication (2FA) to virus scanning and user management, support your compliance efforts with document versioning, secure data transmission and encryption, and detailed access logs.

- Accurately manage and track documents from draft to final, published version with the ability to require admin approval before users are granted access.
- Protect unauthorized sharing with dynamic watermarks that can be customized to include your desired fields.
- Control individual user access with the ability to set expiration dates.



*"We can actually track the source of where all our leads come from. So, over time, we can see trends and gain **valuable insight** for fundraising. Where should we be spending our time? Should we be working with existing investors or should we be going out in the market to uncover leads? Should we be prospecting more? Altvia has really helped us **organize and prioritize our efforts** as a capital development team."*

Jenna Greenspan, Capital Development Director



Get the Right Technology to Jumpstart Your Fundraise. >

Contact Altvia Today