

BACKSTOP CRM PLATFORM

THE CHALLENGE

Your time is finite. Which means it's also invaluable. And your industry is fast-paced and constantly changing. Every day you juggle multiple roles and responsibilities — from capital-raising to relationship management, communications to capital-raising, and everything in between. On top of all of that, you're expected to address questions about your firm's institutional readiness, including issues of compliance, security, and stability. And, you have to do it all while consistently delivering outstanding portfolio performance. In short, you need to make every minute matter.

The surest way to make the most of every minute is to equip yourself with the best software solution and resources. Attempting to meet all of these challenges using static systems and spreadsheets simply isn't effective or efficient.

That's where Backstop comes in.

THE SOLUTION

Developing and nurturing lasting client relationships requires the right balance of intuition and information. Sure, your instinct is a great start. But information is what truly powers success. To get that balance right, you need a robust service and communication program that organizes and streamlines knowledge, so you can efficiently manage relationships and drive your organization's overall success.

Backstop CRM – Client Relationship Management software – is an award-winning, centralized database that empowers you to continually and effectively meet goals and exceed expectations as soon as you log in to Backstop Home Base Fig 1.

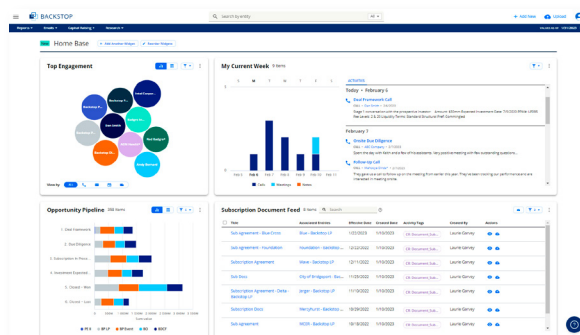


Fig. 1 – Backstop Home Base

KEY BENEFITS

- **Increase operational efficiencies** through a centralized, comprehensive system.
- Maximize the value of client loyalty through **robust relationship management**.
- Meet and exceed client expectations for **communication management**.
- **Optimize and leverage your prospect database** to gain a competitive edge.
- **Protect your data** and maintain compliance.

PURPOSE-BUILT FOR THE NEEDS OF:

- Hedge Funds
- Private Equity/Real Estate/ Venture Capital
- Institutional Asset Managers
- RIA
- Funds of Funds
- Advisors and Investment Consultants
- Pensions
- Endowments & Foundations
- Family Offices

BACKSTOP CRM PLATFORM

DATASHEET



BACKSTOP CRM – **CAPITAL-RAISING MANAGEMENT**

The Backstop CRM platform enables easy, accurate and comprehensive capital-raising lifecycle management with real-time capital-raising analytics and data visualization.

The platform enables you to:

- Manage interest levels, client types, and investment probabilities utilizing opportunity pipeline and capital-raising dashboards developed specifically for institutional and alternative asset managers.
- Focus on the most, relevant, winnable opportunities by probability.
- Manage opportunities through various stages or update them in bulk with ease.
- Answer important questions based on the real-time data and analytics available in Capital-Raising Dashboards in seconds.
- Easily create and share reports and analytics to accurately measure business development effectiveness.



BACKSTOP CRM – **RELATIONSHIP MANAGEMENT**

The Backstop CRM platform provides an organized, efficient foundation for managing client and partner activities, investment documentation, research materials, and email communications.

The platform enables you to:

- Capture and share all notes, meeting content, calls, and documents.
- Automatically synchronize contacts and emails, with seamless Outlook® integration.
- Restrict access by role or user type to ensure compliance with both internal and external policies.
- Access crucial information, manage contacts, and add notes while on the go using Backstop Mobile.
- Manage real-world relationships and track the information that matters most.



BACKSTOP CRM – **COMMUNICATION MANAGEMENT**

The Backstop CRM platform includes a comprehensive suite of software solutions that empower you to develop more effective communication email campaigns, branded investor portal, and more.

The platform enables you to:

- Create and send unlimited email distributions to clients, prospects, and other contacts through the email center.
- Monitor message reads to evaluate campaign success and maintain compliance.
- Protect clients and firms by distributing reports, statements, K-1 forms, fund documentation, and much more through a branded, secure online portal.

You need a robust service and communication program that organizes and streamlines knowledge, so you can efficiently manage relationships and drive your organization's overall success.

THE BACKSTOP CRM PLATFORM TECHNOLOGY SPECIFICATIONS

FEATURES	BENEFITS
Single hub for managing contact information, with seamless integration with MS Outlook	<ul style="list-style-type: none"> • Increased operational efficiency • Higher accuracy and consistency
Real-world relationship tracking, including detail on the strength and importance of individual relationships	<ul style="list-style-type: none"> • Competitive edge through prospect database optimization • More effective relationship management
Share important meeting details and research in just a few clicks	<ul style="list-style-type: none"> • Consistent and current knowledge across entire organization
Send Investor letters or marketing campaigns through built-in email campaign tool	<ul style="list-style-type: none"> • Streamlined processes • Consistency in mass communications
Prebuilt summary reports and ad-hoc reporting capability	<ul style="list-style-type: none"> • Repeatability with flexibility • Minimization of errors
Store and share important investor and fund documents	<ul style="list-style-type: none"> • Greater trust with investors through higher-quality communications • Ability to adhere to security and compliance standards
Configure individual relationships to display relevant notes and documents with appropriate contacts	<ul style="list-style-type: none"> • Deeper insight into relationships • Optimized account management
Pipeline Manager	<ul style="list-style-type: none"> • Get out of spreadsheet purgatory, and view pipeline information directly, slicing and dicing data by team member, geography, lead source, expected close date, opportunity stage, probability, and more
Capital-Raising Dashboards	<ul style="list-style-type: none"> • Real-time data, analytics, and insights you need to answer important questions on the fly

To learn more, visit backstopsolutions.com/backstop-crm

BACKSTOP CRM PLATFORM

DATASHEET


ABOUT BACKSTOP SOLUTIONS

Because every minute matters, Backstop’s mission is to help the institutional investment industry use time to its fullest potential. We develop technology to simplify and streamline otherwise time-consuming tasks and processes, enabling our clients to quickly and easily access, share, and manage the knowledge that’s critical to their day-to-day business success. Backstop provides its industry-leading cloud-based productivity suite to investment consultants, pensions, funds of funds, family offices, endowments, foundations, private equity, hedge funds, and real estate investment firms.

CONTACT US

 backstopsolutions.com


 info@backstopsolutions.com

 **Main:**
+1 312 277-7700

Sales:
+1 312 277-7701

United Kingdom:
+44 0-800-069-8582

Hong Kong:
+852 3511 6015

 **Chicago (HQ)**
233 S. Wacker Dr.
Suite 3960
Chicago, IL 60606

New York
151 W. 25th St.
6th Floor
New York, NY 10001

London
20 St Dunstons Hill
London
EC3R 8HL
United Kingdom

Hong Kong
69th Floor
The Center
99 Queen’s Road Central
Hong Kong
China