

# CHECKLIST

## BOOST INVESTOR ENGAGEMENT

Technology is making it simpler and more efficient than ever before for sponsors to contact and engage with investors, and vice versa. By investing in IMS, you've gained access to tools that help you keep your investors informed, provide real-time insights and transparency, and get prospective investors ready to invest with your firm.

**Read ahead for 10 top tips and next steps to boost engagement in IMS Investor Portals.**



### Re-Invite Investors

Resend 'Invite to Invest' emails to all Investor Profiles who are not active on your platform. Through the Bulk Actions tool in the CRM, Sponsors can resend invitations to all Investors who haven't activated their portal in seconds. IMS recommends doing this monthly until all Investors are active on the portal.

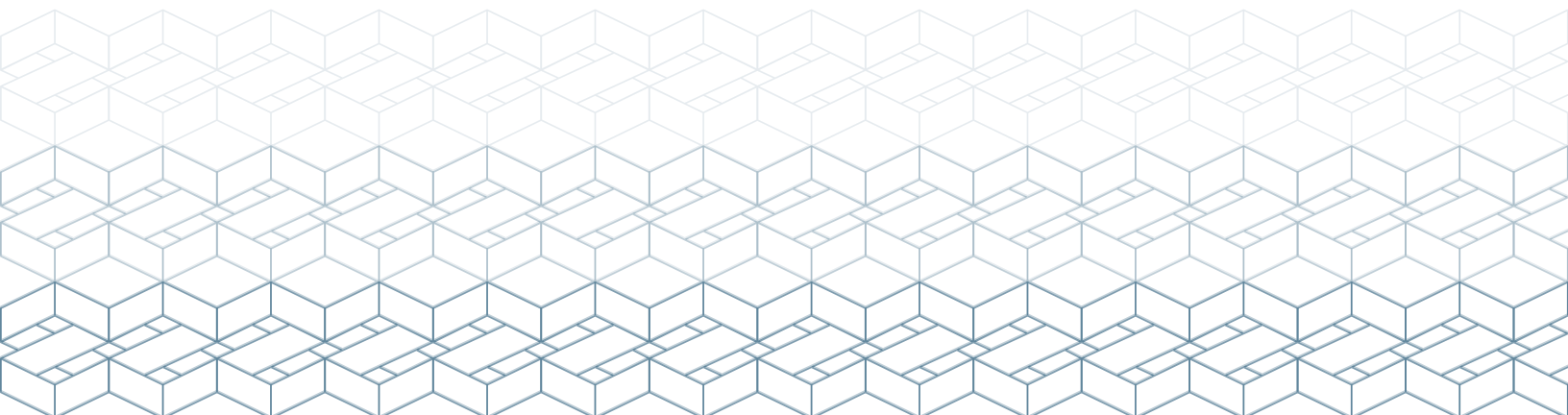
*Contacts > Select All > Bulk Actions 'Invite to Investor Portal'*



### Customize Portal Notifications

Use customized notifications to keep investors up to date on changes made to their portal, such as when new offerings open or documents are uploaded. These notifications keep investors engaged and interested in activity happening in their portal, while providing real-time updates and reinforcing company messaging and branding.

*Investor Settings > Portal Notifications*



## ☐ **Send Emails with Call-to-Action**

Utilize Call-to-Action buttons in investor email communications, which will reduce confusion by supplying a direct link to a specific offering in the deal room. Call-to-Action buttons boost click-thru-rates on emails and easily supply investors with relevant links or follow up content.

*Custom Email > Call-to-Action*

## ☐ **Customize Investor Dashboards**

Give investors quick, on-demand access to investment performance by customizing investor dashboards with key metrics. Investors can easily evaluate investment performance through 45+ metrics such as Cash on Cash, Current QTR Distributions, and Return of Capital.

*Investor Settings > Dashboard Preferences*

## ☐ **Configure Custom Metrics**

Utilize Custom Metrics to share information or calculations with investors on Projects that isn't currently a standardized metric provided by IMS. Custom Metrics are simple to add and share with your investors on both the Investor Dashboard and Investor Statements.

*Investor Settings > Dashboard Preferences > Custom Metrics*

## ☐ **Regularly Send Investor Statements**

Exceed investor expectations by delivering consistent and personalized Investor Statements directly to their email inboxes on a monthly or quarterly basis. Sponsors can generate and publish hundreds of branded, unique statements within minutes and create a customized template for future use.

*Documents > Investor Statements*

## ☐ **Upload Documents to Portals with Notifications**

When uploading K-1s, Investor Statements, and other Project Documents to investor portals, choose to include a notification, which alerts investors when new documents are added to their portal.

*Upload Document > Notify Investors*

### ☐ **Add Internal Investor Support Contact Information**

Ensure investors have timely access to the resources and support they may need when reviewing their investment portfolio by adding your firm's internal Investor Relations contact information on investor portals.

*Admin Settings > Support Contact*

### ☐ **Publish Visually Engaging Offerings**

Create and publish New Offerings to the Deal Room that are visually engaging by adding imagery, introductory text, and investment details. Sponsors can build trust with investors by sharing relevant information and insights about each asset.

*Add Project > Define & Details*

### ☐ **Streamline Investor Communication**

Streamline processes by onboarding more team members into IMS and using the platform to communicate with investors. By using a consistent medium, investors can begin to expect who, how, and when they will be contacted and anticipate communications.

*Admin Settings > Add Team Members*

## WHAT ARE THE NEXT STEPS?

Investor Management Services (IMS) is the leading investor experience platform for CRE owners and investment firms. Today we have over 550 customers who have been able to reallocate thousands of hours back to value-add activities for their 85,000+ investors. The IMS Platform is being used to calculate \$6+ Billion in distributions and \$50+ Billion in equity.

**Login to your account today to leverage these tips to increase and maintain investor engagement in IMS.**

**View a list of recent [product releases and enhancements here.](#)**



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and tips by visiting our  
[Client Resource Center!](#)