

IMS INSIDER



HIGHLIGHTS

BULK DOCUMENT UPLOADER

Leverage this newly-released feature to save time now and during tax season

CLIENT RESOURCE CENTER

Explore the latest addition to client exclusive resources and support

YARDI® STANDARD INTERFACE PARTNERSHIP PROGRAM

As a Yardi Voyager® client, process distributions without leaving IMS

IMS USER CONFERENCE

Save the date for IMS' 1st annual user conference May 4-6, 2020 in Charlotte, NC



IMS



What's Inside



New Features

pg 3

Review of new features and product enhancements released within the last quarter including Yardi Voyager® Integration, Bulk Document Uploads, and more



Continuing Education

pg 5

Recap of recent client training sessions, overview of newly-published resources, and preview of upcoming opportunities



Best Practices

pg 7

Strategies for getting the most out of your CRM with best-in-class client tips



Market Watch

pg 10

Top trends in the CRE market, with a focus on Millennials as employees, investors, and industry colleagues

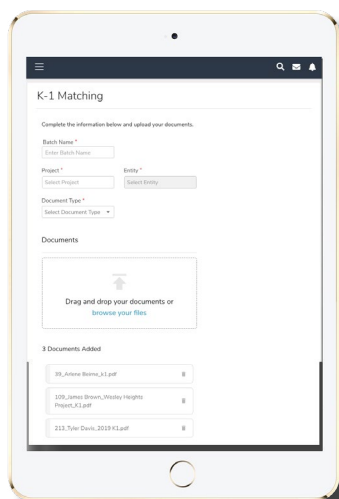


Company News

pg 11

One-stop shop for IMS company news and updates, including the announcement of IMS' first annual User Conference in 2020

New Features



BULK UPLOAD DOCUMENTS

Save Time & Reduce Stress During Tax Season

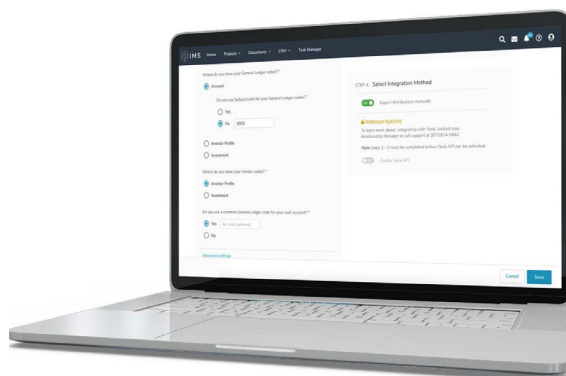
IMS has made enhancements to the Personal and Project Document feature. Admins can now bulk upload documents such as K-1s and other tax documents, at scale. Choose from 3 unique upload methods: K-1 Uploading, Manual Matching, or Upload by Filename. Simply upload the documents and let IMS do the work for you! Our system will match the document to the associated investor, which allows Sponsors to upload documents quickly and publish at scale.

[Bulk Documents Release Announcement](#)

YARDI® API

IMS Joins the Yardi® Standard Interface Partnership Program

IMS has joined Yardi® Standard Interface Partnership Program, which uses a modern-service-oriented architecture to integrate industry-leading technology platforms with some of Voyager's most widely used processes and transactions. This opportunity enables IMS to collaborate with Yardi® and leverage Yardi Voyager's open system to develop a standard API interface that drives direct integration with and a seamless exchange of data between Yardi® and IMS.



[Yardi® API Release Announcement](#)

3rd QUARTER ROUNDUP

Minor Releases

- [Annualized Cash on Cash Investor Metric](#) [🔗](#)
Updates were made to the Annualized Cash on Cash YTD metric to account for years without transactions. Visit Investor Settings to display this metric directly on Investor Dashboards and Investor Statements.
- [Personalized Investor Emails for New Offerings](#) [🔗](#)
Rather than sending investors to the overall Offerings page in Investor Portals, emails now link to a specific deal.
- [Sponsor Notifications*](#) [🔗](#)
Admins with user permissions can now Approve or Reject Distributions directly from the notification menu. We have also enhanced task notifications to send an alert when a new task is assigned to you, when a task is due within 24 hours, when a task is overdue, and when unassigned tasks are overdue for your overall account.

*Coming Soon to Sponsor Notifications


Sponsors will soon have the ability to send Distribution batches directly from the Notification menu following the approval of the batch.

Product Release Spotlight

User Segments

Each quarter we will spotlight a recently-launched feature and take a look at how some of our top clients are leveraging it, as well as review some best practice tips for maximizing its value.

In commercial real estate, email marketing is one of the most effective ways to promote your business, share new offerings, and provide portfolio updates to your network. But with hundreds of investors, business partners, prospects, and other stakeholders, it can be challenging to know who to email and when is the right time. Further, everybody may not need to receive every message, which could reduce their chances of reading those emails that are relevant. Creating targeted email distribution lists to organize your contacts can help you manage and scale your communication efforts.

Launched on July 1st, User Segments in IMS is a feature that Sponsors can use to send highly targeted emails to investors or prospect groups by dividing contacts into smaller batches, or “segments.” Within the CRM, create segments of individuals based on set criteria that you choose. [Start sending relevant and valuable communications to select investors at scale!](#) 

10 CREATIVE USER SEGMENT IDEAS

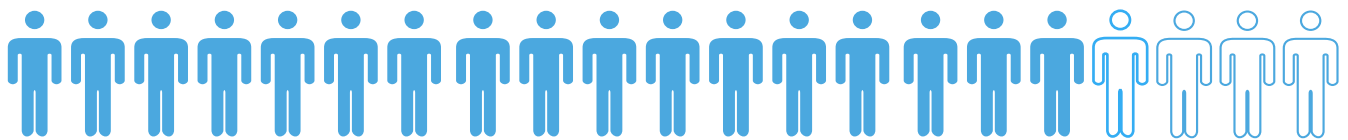
● INVESTMENT PARAMETERS
● REGIONAL AND GEOGRAPHIC LOCATIONS
● PIPELINE - <i>Prospect, Current Investor, Past Investor</i>
● MARKETING COMMUNICATION LIST
● ROLES - <i>Investor, Business Partner, Vendor, etc.</i>
● COMPANY PARTNERSHIP/BUSINESS RELATIONSHIP
● CUSTOMER REFERRAL PROGRAM PARTICIPANTS
● NEW vs RETURNING INVESTORS
● LEVEL OF INVESTOR ENGAGEMENT
● SOURCE TYPE - <i>Active Prospecting, Friends and Family, etc.</i>

“User Segmentation gives sponsors the ability to improve their engagement and focus on targeting specific investors. With this feature it allows them to create better communication strategies and develop relationships with their prospective and current investors.”

- Stephanie M., UI/UX Designer at IMS

Continuing Education

Take advantage of client exclusive support and resources to maximize the value IMS can provide to your firm. Join us weekly for live client trainings or browse our library of help articles.



176

Individuals that attended at least one webinar or office hour session in the 3rd quarter.

ON-DEMAND WEBINARS

Learn how to leverage different features of IMS, best practices, and actionable product insights.

- [🔗 October: Best in Class Customer Insights Panel](#)
- [🔗 November: Commitments & Capital Calls](#)
- [🔗 December: Preparing for Tax Season - Bulk Document Upload in IMS](#)

OFFICE HOURS

Follow along live with IMS experts and engage with your peers in these interactive sessions, which showcase in-depth tutorials on how to utilize a specific feature within IMS.

- [🔗 October: Documents & e-Signatures](#)
- [🔗 November: Commitments & Capital Calls](#)
- [🔗 December: Bulk Document Upload](#)

KNOWLEDGE CENTER & SUPPORT

Explore written articles and short demonstration videos that can be accessed directly from the application.

Featured Recently Added Articles:

- [🔗 Waterfalls 202 - Template Explanation and Rule Calculations](#)
- [🔗 Distribution Bulk Upload](#)
- [🔗 Add a New Project](#)

[🔗 Register for October's Customer Success Webinar Panel: Best in Class Customer Insights](#)

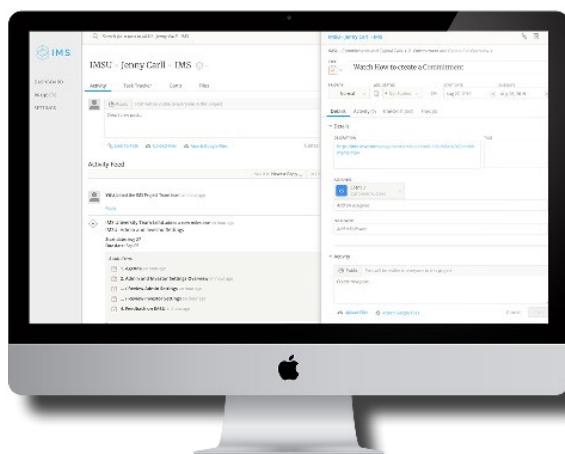
Client Support & Resources

Mastering a new technology can seem overwhelming, but we are here to make sure you succeed! It's no secret that everyone learns differently, so we provide a variety of ways to learn the platform and get help along the way.



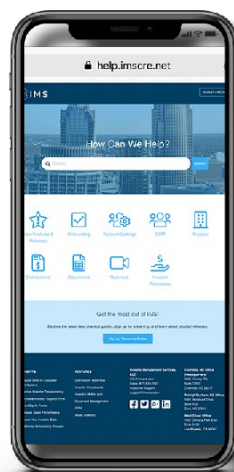
Knowledge Center

Beginning at onboarding, the Knowledge Center is available to clients and houses over 100 articles and videos ranging from setting up a basic account in IMS to customizing an advanced profile in the application.



Resource Center

Our Client Resource Center is designed to be a one stop shop to stay up to date with IMS. See what is coming ahead and download resources to help you get the most out of your IMS account!



IMS University

IMS University provides a training demo account where clients can follow along with step-by-step tutorials and get comfortable with features.

Thought Leadership Content

IMS released four client case studies in Q3, highlighting the value that IMS has created for top CRE firms.

Read a few insights from this month's featured clients, and click the link under each quote to read the full case study.

Interested in participating in an IMS case study? Please email training@imscre.com.

“Not only did we significantly surpass previous capital raises by syndicating through IMS, we completed our first raise in IMS within a week. This was due to various factors, the most important being the value proposition of the deal itself, but it was made possible by the IMS platform and technology.

🔗 [Download this case study on automating capital raises](#)



“IMS has been able to accommodate our different types of clients ranging from institutions down to friends and family investors. It's worked out really well and our investors are very happy with it and comment on the professionalism it's brought to our new deals.

🔗 [Download this case study on communicating with investors at scale](#)



“IMS understands our business model as a developer and provides a platform that was flexible enough to meet our unique needs. IMS is a cost-effective solution that allows our business to grow and scale during the entire time period of an asset's development.

🔗 [Download this case study on efficiently managing back office operations](#)



“With IMS I have been able to run all of my investor communication through the system, and the response from investors has been really favorable. Everyone is happy with the ease of use on the investor portal and having on-demand access to all documentation. It's stepped up my firm's professional branding.

🔗 [Download this case study on exceeding investor expectations even with a one-man shop](#)



Best Practices

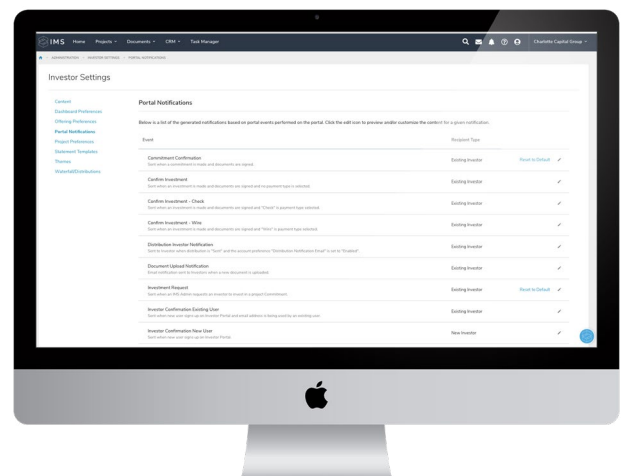
Maximize the Value of Your CRM

A CRM enables you to efficiently manage relationships with your investors and other stakeholders. The IMS Platform has a CRM tailor-made for commercial real estate businesses that provides a centralized location for all investor information, right at your fingertips. As a single source of truth, sponsors can easily locate contact information, track engagement, surface communication records, and view investment activity. opportunities and scales the process.

1 CUSTOMIZE NOTIFICATIONS

Keep investors engaged and up-to-date with important email alerts by customizing portal notifications to match your company's brand and messaging.

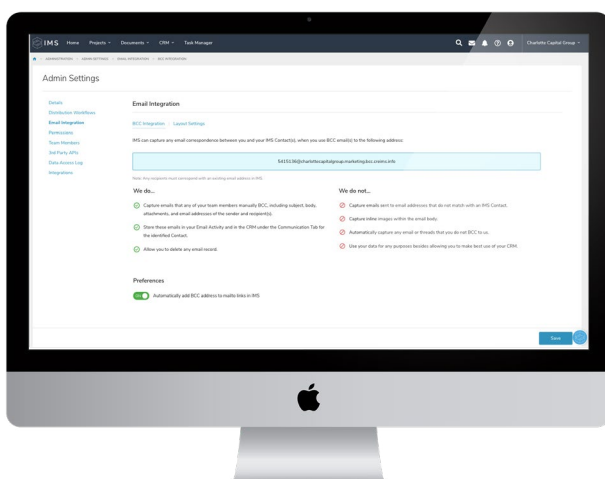
Investor Settings > Portal Notifications



2 INTEGRATE BCC

Integrating BCC into your emails can help you keep team members updated about investor communications and track investor emails sent outside of IMS!

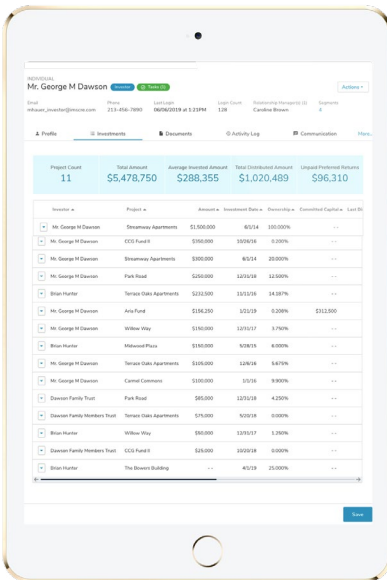
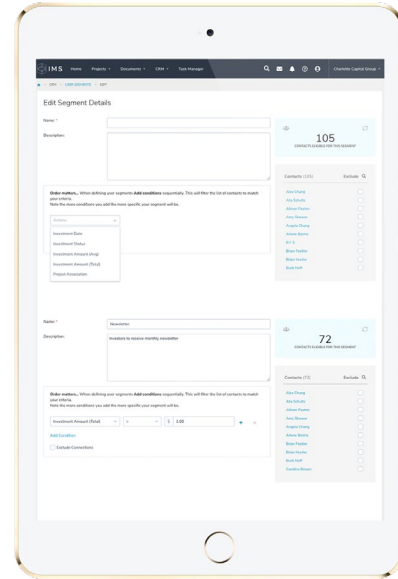
Admin Settings > Email Integration



CREATE USER SEGMENTS

Easily create distribution lists that automatically update nightly based off filters selected. Only investors of these relevant groupings will get emailed, which increases engagement on content contained in the email and reduces over-communication.

CRM > User Segments



MANAGE INVESTOR PROFILES

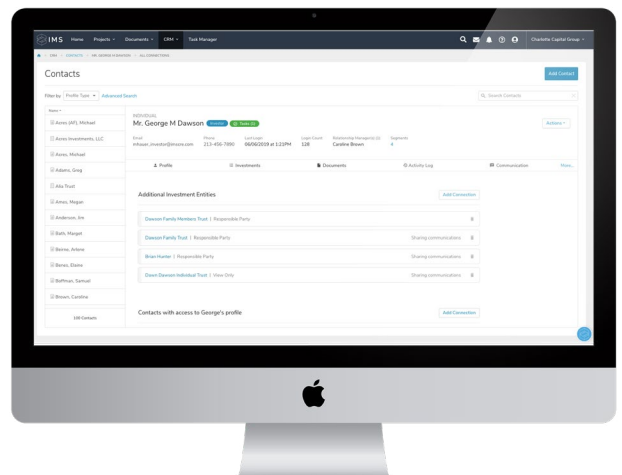
On any device, including mobile, efficiently add, update, and manage contacts in the CRM. Quickly see details on an investor's investment portfolio with easy-to-digest metrics such as total investments and total distributions. Upload, view, and download documents to a specific investor from their CRM profile!

CRM > Contacts

BUILD CONNECTIONS

Reduce time sending duplicate emails or trying to remember which responsible parties need to be copied on emails! Simply connect an Entity, Contact, or Relationship Manager to an investor and select which email communications will be shared with this profile.

Contacts > Connections



Market Watch

Attract and Retain Talent in CRE

Finding, hiring, managing, motivating, and retaining top talent has become a key challenge and priority for firms nationwide. One of the prime areas in which firms have found they are able to build a competitive

advantage in this war for talent is by investing in technology and software solutions that streamline processes, boost productivity, and enable greater focus on value-add work. Technology is a critical pillar not only for attracting and retaining talent but also for executing on your firm's business strategy.

70% of Millennials feel unengaged at work, which can negatively impact retention

...ZZZ

As Millennials become the largest cohort in the United States, it's important to note how they differ from other generations. Millennials see technology positively and understand how it can be used to communicate more efficiently, collaborate more effectively, drive productivity, and eliminate repetitive tasks (which could currently be a part of somebody's job). Young employees can also be frustrated by outdated systems or with older workers struggling to adapt to new technology. Though older generations, particularly in the commercial real estate industry, may be more hesitant to adopt new technology, 8 out of 10 Baby Boomers do think that Millennials' advanced knowledge of technology will enable them to get ahead in the workplace.

[Download the Best Practice eBook: Leveraging Technology to Attract and Retain Talent in the CRE Industry](#)

Rise of Millennial Investors

EACH COHORT ANNUALLY SPENDS

● **MILLENNIALS - \$80 MILLION**

● **BABY BOOMERS - \$74 MILLION**

● **GEN X - \$66 MILLION**

Most commercial real estate owners, operators, and developers don't have the technology, tools, and acumen to engage or manage Millennial investors. Be careful with stereotypes about this massive group of potential buyers. Yes, many are strapped with loads of student debt. However, the Shullman Research Center recently reported 23% of worldwide millionaires are Millennials. That's right, 5 million Millennials have a net worth exceeding \$1 million, making them accredited investors and an emerging source of Capital. Generation X counts only 4 million millionaires in its midst. Baby Boomers, of course, still lead the way with more than 10 million.

One clear fact about Millennials is the generation's disdain for Wall Street banks and traditional brokerage investing. With many Millennials coming of age during the Great Recession, they're generally more conservative investors with a preference for safer, long-term asset classes. Unfortunately, most Millennials continue to save most of their investable assets in cash. It is often stated that Millennials prefer to invest in passively-traded ETFs, rather than picking stocks and bonds. While that's true for many, a recent TD Ameritrade survey of Millennials found high net-worth Millennials actually hold more real estate in their investment portfolios than ETFs. Those wealthy Millennials were more likely to have real estate investments than index funds, annuities, foreign stocks, or shares in private businesses.

[Download the Best Practice eBook: Are You Ready for the Millennial Investor?](#)

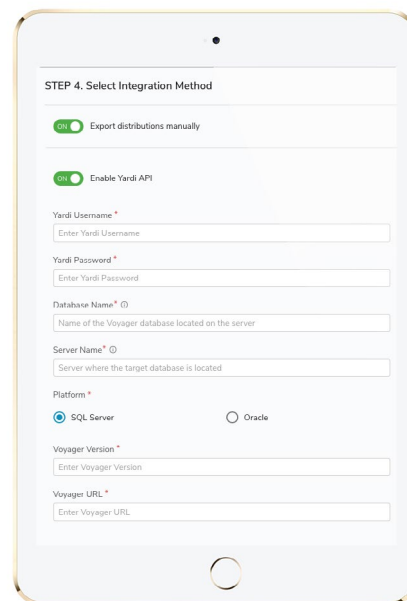
IMS Updates

IMS Joins Yardi® Standard Interface Partnership

Yardi® Standard Interface Partnership Program, uses a modern-service-oriented architecture to integrate industry-leading technology platforms with some of Voyager's most widely used processes and transactions. This opportunity enables IMS to collaborate with Yardi® and leverage Yardi Voyager's open system to develop a standard API interface that drives direct integration with and a seamless exchange of data between Yardi® and IMS.

This enhancement allows IMS Administrators to send distribution data to Yardi Voyager® with a simple click of a button! The API Integration eliminates the need to manually download the distribution data into an Excel file and then upload it into Yardi Voyager®. Now you can fully process your distributions without leaving IMS!

[Read more about our Yardi® Standard Interface Partnership](#)



Coming Soon: Improved e-Signatures on Documents

We are excited to announce that we've made enhancements to the document signing process in IMS! By incorporating the entire document process into the platform, this new feature will give Sponsors **more control** on how e-Signatures are embedded into documents and more satisfaction with finalized documents. With the enhancements, you'll discover a **more intuitive electronic signing process with faster document status updates!**

E-signature Features:

- Electronic signatures managed completely within the app
 - Drag-and-drop templates for creating reusable documents
 - Co-signing and associating documents directly in the offering
 - Document storing within the app for future review
- ... And so much more!

Stay tuned for additional information about this new feature coming out soon. In the meantime, visit the [Client Resource Center](#) to register for our upcoming [Office Hours](#) session about these enhancements!

Converge New York

Wednesday, October 23rd, 2019

LEARNING & TRAINING

9:00 - 11:00 AM
Meet in Place Midtown
675 3rd Ave
New York, NY 10017

NETWORKING & SOCIALIZING

5:30 - 8:30 PM
Refinery Rooftop
63 W 38th St
New York, NY 10018

[REGISTER HERE](#)

This is a free event, but registration is required

Join us in Midtown Manhattan!

Please join us and your fellow commercial real estate colleagues for a morning of learning, training, and brunch in Grand Conference Room #11 at Meet in Place Midtown, followed by an evening of networking and socializing at Refinery Rooftop in Midtown Manhattan. Enjoy cocktails, heavy hors d'oeuvres, and panoramic skyline views on us!

Why Should You Attend?

Here are 5 key reasons you won't want to miss this invite-only cocktail hour and dinner!

INTERACTIVE TRAINING - The Customer Success team will provide training on product features and recent enhancements, demonstrate best practices to leverage the application, and answer questions.

UPDATES AND SNEAK PEEKS - Learn about new and upcoming product features and releases and discuss the road map.

NETWORKING OPPORTUNITIES - Engage with 40+ of your fellow CRE colleagues in the area over cocktails and hors d'oeuvres.

GAIN INDUSTRY INSIGHTS - Gain valuable industry and product insights from our senior leaders.

EAT & DRINK ON US - Enjoy innovative artisanal dishes by Chef Jeff Haskell and seasonal craft cocktails in a prime location overlooking the city





WHO: CRE Professionals

WHAT: IMS InSites, the industry's first and only investor management conference

WHEN: May 4-6, 2020

WHERE: Charlotte, NC

1st Annual User Conference

Over 3 days, attendees will gain valuable insights and strategies around leveraging technology to build investor trust, effectively manage investor relationships, and drive back-office efficiency. Alongside industry leaders and IMS community members, engage in hands-on training activities, gain best-in-class success strategies, and be inspired by your forward-thinking CRE peers.

IMS InSites will address the challenges facing commercial real estate professionals in today's evolving marketplace and presents solutions to help sponsors create a best-in-class investor experience that exceeds investor expectations. Attendees will have the opportunity to network with industry peers, leaders, and influencers; engage in interactive training and best practice IMS product sessions; and get a sneak peek into new and upcoming IMS product features. Said Emma Grillo, Senior Associate at The Ardent Companies, "After attending two IMS Converge

training events, I see how powerful these opportunities can be in helping us to leverage CRE technology to drive best practices and efficiencies across the Ardent team. The IMS InSites conference will create an even larger forum to share those best practices and learn from other leaders in commercial real estate, and I think it will be even more impactful."

The Industry's First & Only Investor Management Conference



Networking

Engage with 150+ CRE professionals, leaders, and influencers from across the country



Education

Choose from 2 tracks to learn about the latest CRE trends, insights, and best practices



Learning

Participate in interactive training workshops for the IMS Platform



Sneak Peeks

Get up-to-speed on new and upcoming product features, releases, and updates

[Sign-up to be notified when early bird registration opens!](#)



IMS



Review us on G² Crowd

Reach out to your Relationship Manager today to schedule your quarterly business review and learn best practices in leveraging IMS to reach your goals.