



Investment Software

A BUYERS' GUIDE

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INTRODUCTION

Investment Software is a relatively new type of technology solution for the real estate investment industry and is specifically designed to facilitate online fundraising, investor engagement, investment management and reduce operational overhead to improve ROI.

This guide provides assistance when comparing different software solutions. We will cover the emerging category of investment management, the problems it seeks to solve, the associated benefits, who is impacted by the technology adoption and the different capabilities one should look for when making a buying decision.

Buyers of these solutions have realized increased efficiencies, increased deal flow and lower cost of capital.



Investor Management vs. Investment Management

WHAT IS THE DIFFERENCE?

Historically real estate firms have focused on Investor Management and have used Investor Relationship Management (IRM) software tools to communicate with and manage their existing investors. Born from Customer Relationship Management (CRM) software, these tools have focused primarily on managing your current investor base but failed to solve four of the biggest pain points CRE investment firms face today:

1

Engaging your investor base

2

Promoting and transacting offers online

3

Managing all investors, their investments, distributions and capital transactions in a single platform

4

Converting new investors into repeat investors through reinvestment

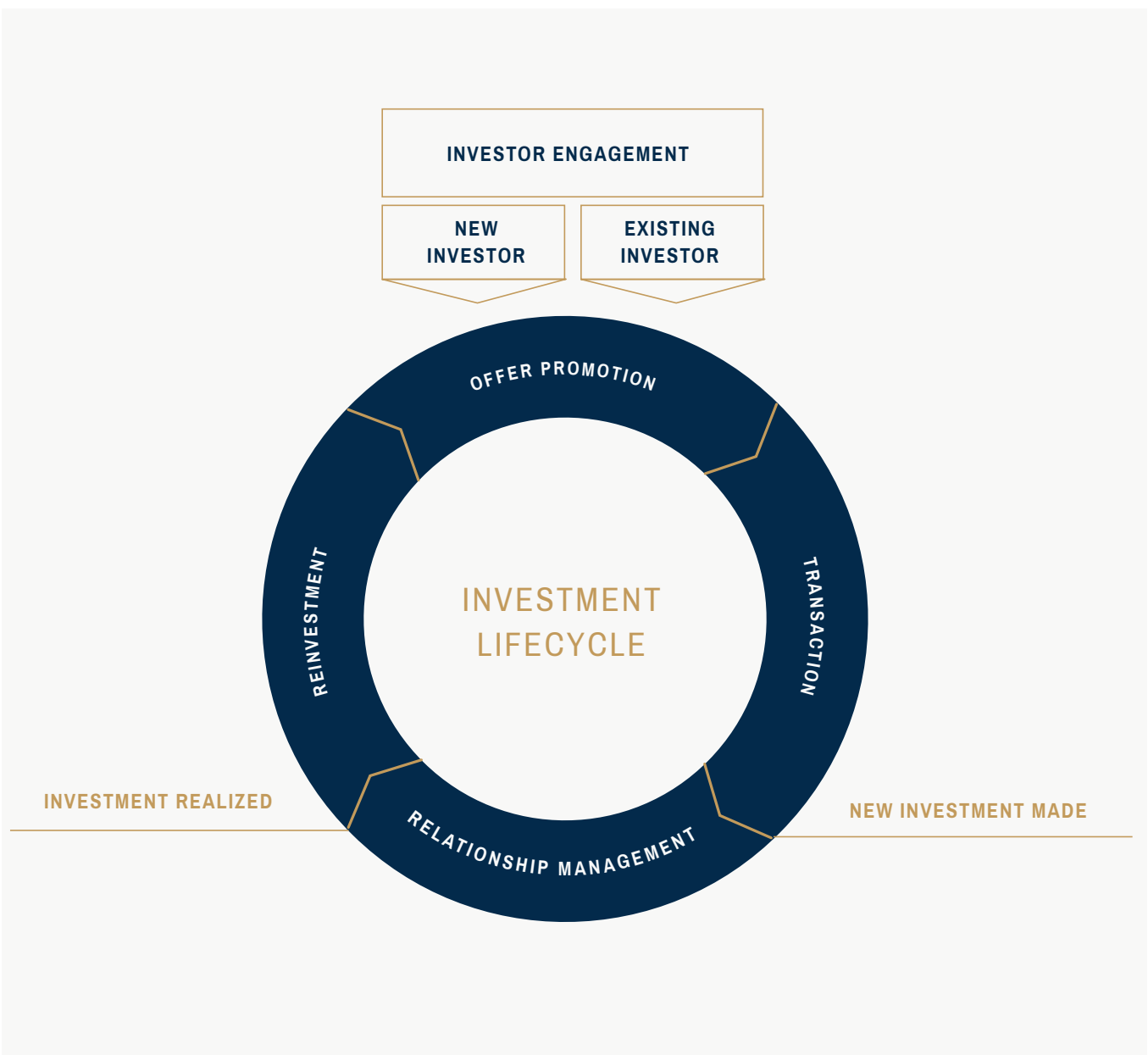


“With [CrowdStreet’s Investment Software], I went from spending 25% of my time managing investors to 1%.”

Joe Ollis,
Founder, COO

Investment Software

Investment Software solves these issues by combining an IRM functionalities with powerful online investor engagement and marketing solutions, online offer promotion and transaction automation, and powerful investment management tools. This allows firms to manage an investor base through the entire lifecycle of an investment – creating more value per investor. The combination of these features creates a complete solution built to solve the modern challenges real estate investment firms face.



What are the benefits of using Investment Software?

Each firm is unique, but the benefits of using Investment Software are similar in each case.



INCREASED DEAL VOLUME

Through automation and specialized tools, Investment Software allows you speed up deal “offer-to-close” time allowing for you to pursue more deals and spend less time getting deals funded.



INVESTOR PORTAL & ENGAGEMENT

Acquire new investors and re-engage your existing investors by promoting your offers online with a white-labeled investor portal. Using built-in marketing tools and lead generation, Investment Software makes acquisition and engagement effortless.



LOWER LONG TERM COST OF CAPITAL

By leveraging online investor acquisition targeting and marketing tools you can attract more investors quickly and with less cost than more traditional methods. Through re-engagement of existing investors, you can increase the lifetime value of each investor, improving your bottom line.



BETTER INVESTOR RELATIONSHIPS

A CRM solution built specifically for real estate specific investor relationships, which keeps investors informed and happy, has never been easier. Happy investors means less phone calls and more time focused on completing deals.



CONTROL YOUR ACCESS TO CAPITAL

More investors means less reliance on institutional capital or a small base of investors. This allows you to be flexible in the deals you pursue and the terms of those deals.



“There was no feasible way we could
have scaled our investor base 10x in
12 months if it hadn’t been for a tool
like CrowdStreet.”

Tom Carroll,
Head of Investor Relations
Watermark Partners

Stakeholders impacted by Investment Software

Who benefits the most from implementing Investment Software?

Everyone connected to the real estate investment business.



CEO / PRINCIPAL / MANAGING DIRECTOR

CEOs, Principals and Managing Directors can use Investment Software to lower the cost of capital, diversify capital risk and increase revenue.



CHIEF FINANCIAL OFFICER

CFOs will use Investment Software to insure compliance through data tracking, consolidate investment & distribution data using an online portal and simplify reporting and K1 tax distribution with easy document management tools.



ACQUISITIONS TEAM

More investors means more deals. Acquisition teams will increase deal flow by leveraging online investor acquisition and engagement tools. Centralized investment data also allows teams to see what deals will be attractive to their investor base in the future.



“Our investors know exactly where to go to find everything they need - a private, secure, and custom branded investor portal accessed directly from Encore’s website.”



Lindsey Knodle,
Investor Relations Manager

INVESTOR RELATIONS MANAGER



Investor Relations Managers are extremely busy team members. Investment Software will help improve investor communication, simplify investor transactions and streamline every day duties.

CHIEF MARKETING OFFICER



Marketing professionals will elevate their company’s brand by creating custom investor portals integrated directly into their existing website. Through built-in marketing tools, they can target, track and segment investors for marketing and communications campaigns.

What features to look for in an Investment Management solution.

THINGS TO LOOK FOR WHEN COMPARING OPTIONS

As mentioned earlier, Investment Software is an emerging category that combines the CRM functionality of an IRM tool with online investor engagement, offer promotion, transaction automation and powerful investment management tools. Not all solutions are the same, here are some key features to look for when selecting a solution.



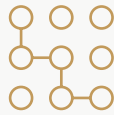
WHITE-LABEL INVESTOR PORTAL

Does the solution come with a white-label investor portal? Does it allow you to market to and engage investors online? Does it include tools for collecting investor preferences, segmenting contacts based on investment history, creating prospects en masse from existing contacts, tracking activity and scoring lead engagement?



ONLINE OFFERING PROMOTION

Does the solution allow you to present offerings online and create professional-grade email campaigns? Does it provide investors with the ability to explore offer details self-sufficiently, download investment documents, rate offerings, provide feedback, ask questions and submit an offer to invest?



TRANSACTION AUTOMATION

Does the solution automate the offer transaction process to allow you to close deals quickly without the use of spreadsheets? Does it improve customer service speed and efficiency with integrated email, chat, FAQ and help center tools?



INVESTOR CRM

Is the solution specifically built for managing real estate investors? Does it allow for complex investment entities or relationships, capture contact profiles and track investor communications



INVESTOR DASHBOARD

Can the solution create personalized performance summaries for each investor? Does it dynamically create investor rooms and investor portfolio dashboards that enable investors to securely login to access reports, statements and tax documents?



SECURITY & COMPLIANCE

Does the solution encrypt PII data both at rest and in transit? Are passwords stored in source code repository? Does the solution have redundancies in place to reduce downtime and data loss?



CROWDSTREET'S INVESTMENT SOFTWARE

CrowdStreet's Investment Software was built by an executive team with over 100 years of commercial real estate investment experience.

Building off this industry experience, the CrowdStreet team spent 3 years co-developing our product in partnership with leading CRE firms, the resulting software is currently being used to manage over 100,000 investors with \$8.8B in investment dollars on the platform today.

Our Investment Software solution for online fundraising and modern investment management, enables your firm to scale more quickly and efficiently. Learn how other firms have leveraged CrowdStreet's platform to scale and grow their businesses by clicking below.

[LEARN MORE](#)

To demo our Investment Software and learn how it can transform your firm click below.

[DEMO](#)

