

**CASE STUDY: WILLIAM WARREN GROUP**

# Maximizing efficiencies and relationships with technology

**THE PROBLEM: TIME CONSUMING PROCESS.**

As William Warren Group's real estate empire grew, managing its network of individual and institutional investors became increasingly cumbersome. The company's existing investor management processes failed to keep pace and required an inordinate amount of CFO Clark Porter's time for oversight.

A legacy solution of adding static PDF documents to a ShareFile folder didn't offer up-to-the-minute data for investors on-demand. It also required manual effort for WWG. The company began seeking a centralized back-office administrative console to manage all of its investor and offering activities.

"We needed an automated, integrated solution to amp up efficiencies," said Porter. "Just as importantly, we wanted to provide our tight-knit family of investors with a portal to monitor the status of their investment activity in real time."

An introduction from a fellow investor a year earlier led WWG to post an asset on the CrowdStreet marketplace. The project was a success, and the team embraced the online fundraising model. Now, the question remained: Would CrowdStreet's white-label platform meet their needs for private, secure and compliant investor relationship management and reporting?

**THE RESULTS: INDISPENSABLE PARTNER.**

After extensive analysis of the top vendors in the space, CrowdStreet emerged as the clear winner. "Having worked with the CrowdStreet team, we knew they had top-notch software and CRE talent, plus a proven commitment to our success," said Bill Hobin, WWG CEO. "When we got under the hood of CrowdStreet, we found the functionality we needed to take us to the next level of engagement with our investors."

The investment management solution's CRM allowed WWG to centralize the company's account and contact information. It provided a turnkey method to distribute quarterly reports, financials and project updates. It also delivered 24/7 portal access for investors to view portfolio and investment positions information.



"I love how user-friendly the new offering distribution process is, both for our investors and for WWG."

Claire Pignataro  
Investor Relations Manager

Following a 60-day implementation project that included integration of 35 portfolio assets, nearly 300 investors, and over 2,300 documents, WWG launched its branded investor portal. The solution quickly became an indispensable part of WWG's technology infrastructure and investment management process.

Today, the majority of WWG's investors use the portal for account updates and self-service admin functions. This shift has yielded a substantial efficiency gain for WWG's leadership team—and an even higher level of investor satisfaction.

### THE BONUS: INDISPENSABLE PARTNER.

Claire Pignataro, Investor Relations Manager at WWG, enjoys the ability to privately invite select investors to review new offerings via WWG's password-protected portal. The investors receive an email alert, then log in to review details and make an informed decision. Once they are ready to invest, they follow a three-step transaction management process (submit offer, e-sign documents and fund their commitment) to finalize the investment.

"I love how user-friendly the new offering distribution process is, both for our investors and for WWG," said Pignataro. "Investors can transact with us online or offline as they wish. Over time, more investors are opting for the online interface given how easy it is."



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Bill Hobin  
CEO

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#### ABOUT WILLIAM WARREN GROUP



The William Warren Group (WWG) is the 10th largest owner of self-storage properties in the U.S. The company has developed, acquired, owned and operated self-storage facilities for over 24 years.

WWG initially raised capital via a tight-knit group of friends and family. Over time, the company's network grew to more than 300 individual investors.

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