altvia

FOR THE PEOPLE WHO NEED TO KNOW WHERE THE RAISE STANDS

Getting started with Investor Engagement Manager

Whether you're running IR day to day or you're the one who ultimately signs off on the raise, you need the same thing from a system: a fast, trustworthy answer to where things actually stand, not something rebuilt by hand or relayed to you secondhand. **That's what IEM is for.**

My Day gives you one prioritized list each morning, tasks and alerts together, so nothing's buried across five tabs. Fundraising Dashboard shows you a live view of the raise that's always current, not a snapshot from last week. LP360 puts a Health Score on every LP, with the reasoning and the CRM records behind it, so you can see which relationships need attention. Alerts take the reports you're already checking by hand and start watching them for you. And when something needs a response, Communications Drafter hands you a grounded first draft for LP outreach instead of a blank page.

One optional add-on Connecting your email to Email Sync strengthens a couple of the features below (flagged where relevant). Not required, but worth knowing about.

Where to start

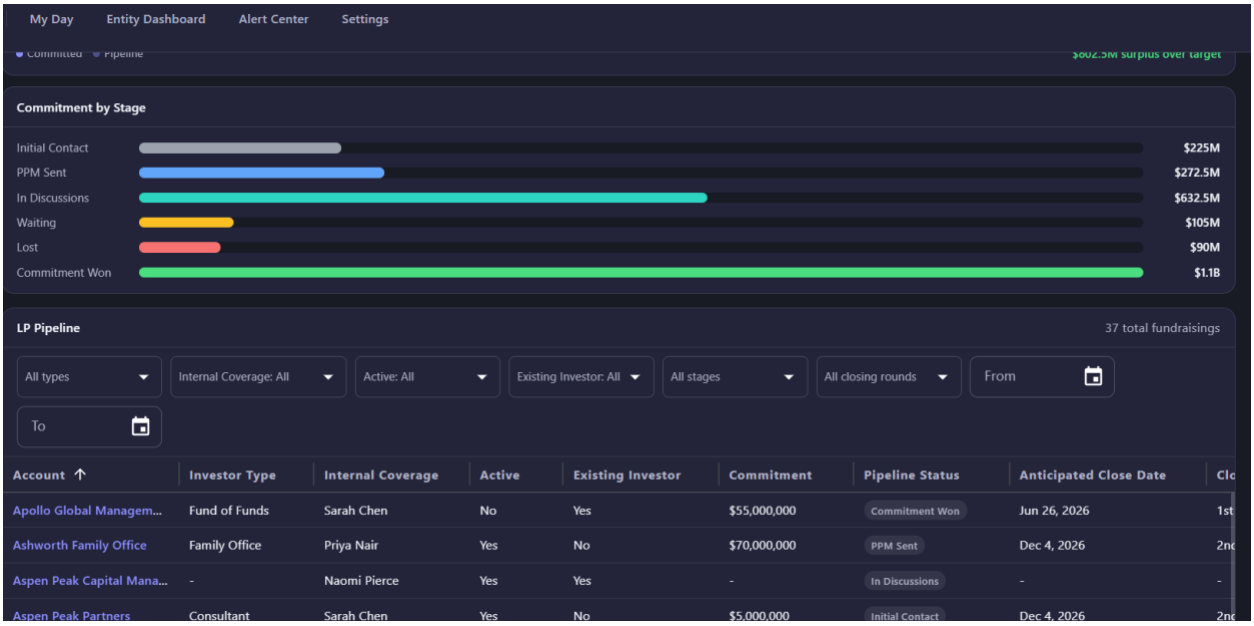
You don't need to learn everything at once. Three steps cover most of what a day looks like, and the rest is there when you need it.

1. Open the Fundraise Dashboard to see where the raise stands. Everything else hangs off this view.
2. Open Alert Center and subscribe to two or three alerts, starting with deadlines and follow-ups.
3. Open an LP's LP360 page, check the Health Score, and use Draft Outreach to write to them.

***Anything marked "Admin only" below can be skipped if you don't manage settings for**

your team.

Fundraising



WHAT IT DOES

A live, filterable view of every investor in the pipeline, reflecting what's actually in your CRM, not a snapshot that goes stale the moment someone updates a record elsewhere.
This is the piece that replaces rebuilding the pipeline in Excel every meeting or quarter end. Some teams put upwards of 60 hours into that assembly work throughout the quarter, for a result that goes stale the moment it's finished. It also keeps Re-Up Conversion current for you. You can quickly answer how many of your existing investors have come back in for this raise, as one aggregate percentage across the raise. It's a rolled-up figure, not a per-investor score, and it traces straight back to the commitments behind it.

On the Fundraising Dashboard, the Commitment by Stage chart is interactive: click a filter from the table below and the chart updates automatically! You can also click a stage within

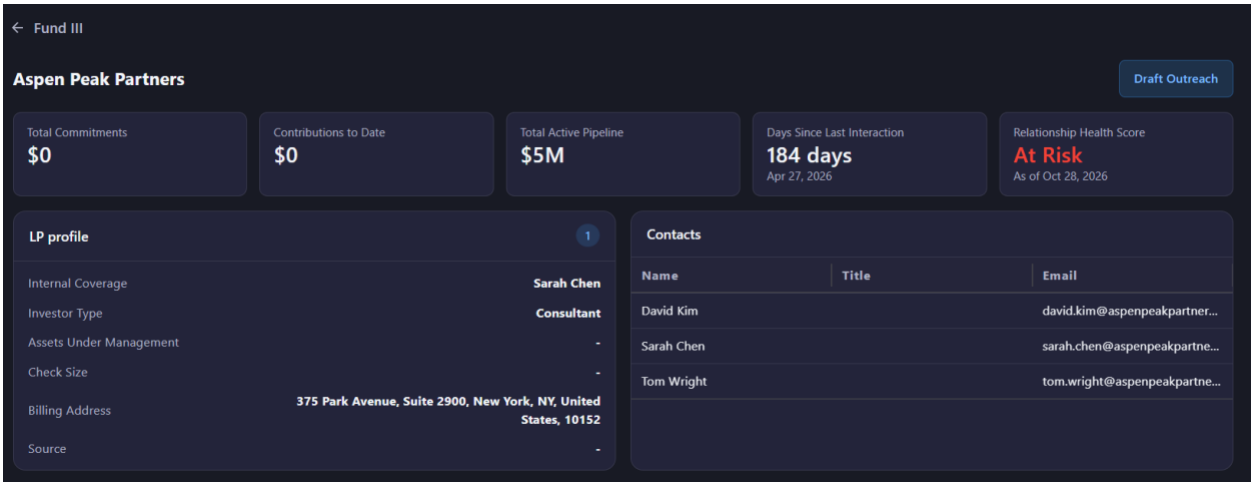
the chart to filter the table below.

HOW TO USE IT

- Open the Overview page for a live summary and quick snapshot. Located right below the alerts panel, you can quickly see: fund target, committed, pipeline, and LP counts, then search or pin the fund you want to have listed every time you log in.
- Click into the Entity (Fund) Fundraise Dashboard for the full picture, including the pipeline table, filterable by type, status, stage, close date, and internal coverage.
- Sort the table by any column, including Last Interaction Date, to find the relationships that have gone quiet the longest.
- Update commitment value, stage, close date, Next Steps, or Notes directly. Next Steps and Notes sit just below the Closing Round field when you edit a row. Any changes are immediately updated in your CRM, so there's no separate reconciliation step.
- Use Convert to Investor Commitment once an opportunity is actually closed, so the pipeline and the system of record never disagree.

LP360

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WHAT IT DOES

Everything about an LP now lives on one page: commitments, contacts, notes, fundraising history, and recent activity. Expand any commitment for its capital account statement (contributions, distributions, IRR, and the underlying transactions) without leaving the LP's

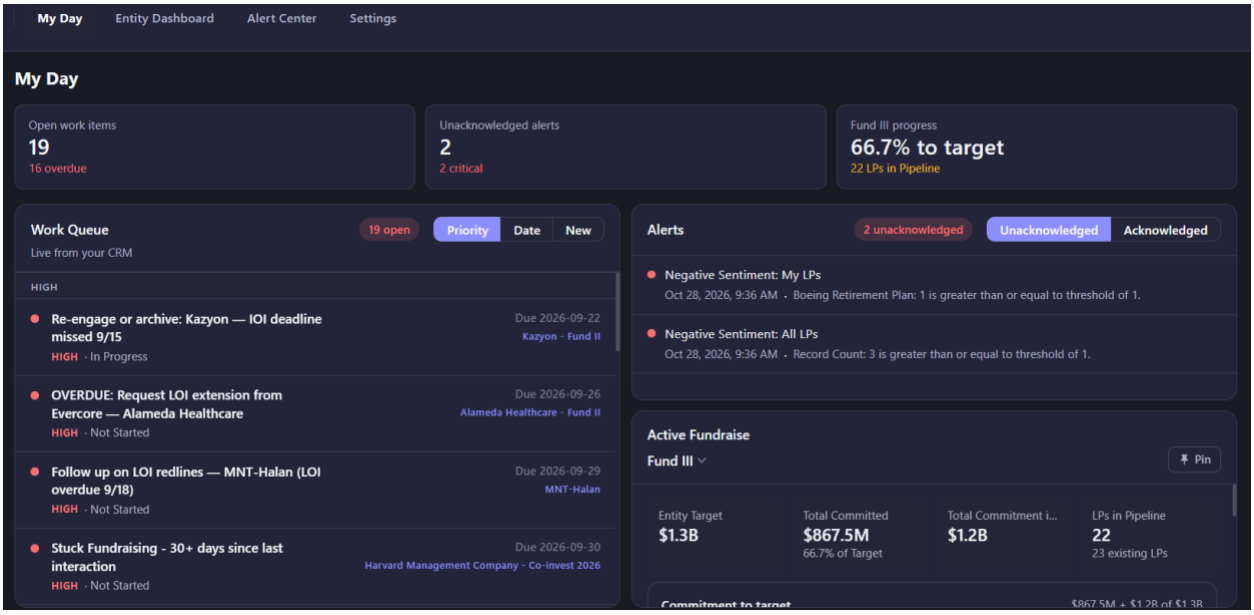
record.

Each LP360 page also shows a Health Score: Strong, Stable, At-Risk, or Insufficient when there isn't enough data yet. It's recalculated overnight from three signals: how often you've engaged with the LP, their commitment history, and momentum across their open fundraising opportunities. A new LP or one with a thin history isn't penalized for it. Click into any signal for a plain-language summary and the records behind it. Summaries refresh whenever they're more than a day old, so they always reflect current data.

HOW TO USE IT

- Click any investor's name in the Fundraise Dashboard table, or open All LPs from the sidebar, to reach their LP360 page.
- Scan the top strip for total commitments, active pipeline, and days since last interaction before you dig into anything else.
- Check the Health Score, then open any of its three signals to see the summary and the records behind it. Select View in CRM to jump straight to them.
- Expand a commitment under Investor Commitments for the capital account statement behind it.
- Select Draft Outreach to start an email from the LP you're already looking at. See Communications Drafter below.

My Day



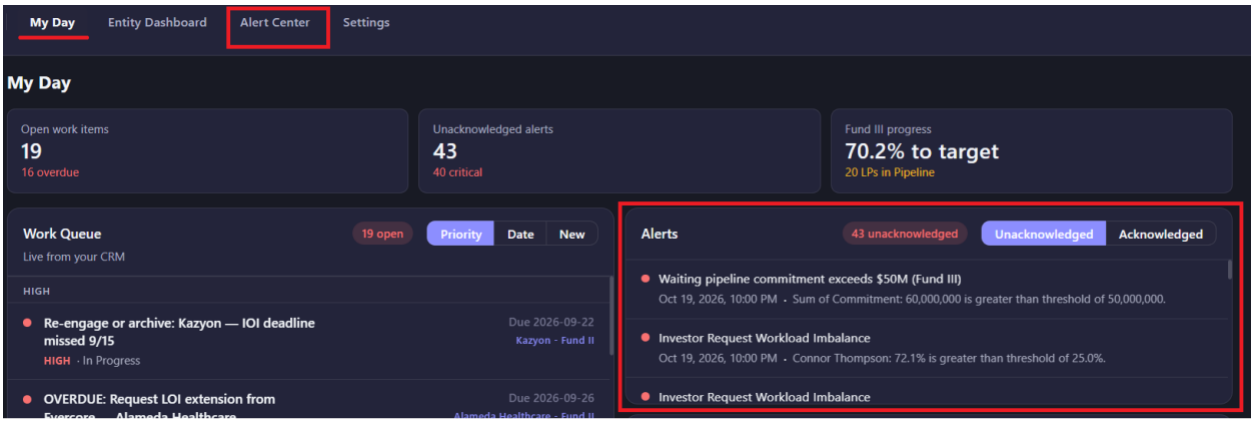
WHAT IT DOES

A single, prioritized view of what's outstanding. This view is built to answer "what's late, what's mine, what changed" without assembling it by hand. Tasks and alerts sit together.

HOW TO USE IT

- Open My Day to see tasks ranked by priority, with due dates and status visible.
- Click into any item to update its status or due date.
- In the Alerts panel, each alert now shows the specific detail that triggered it, so you can see what happened without opening it. Alert titles no longer start with a category label, which leaves more room for the title itself.
- Turn an alert into a task with one click, so nothing slips between systems.

Alerts



WHAT IT DOES

Alerts turn a report you already run manually into something that watches itself, so you catch a status change or a stalled item during the quarter instead of in the scramble at close. Deadline and follow-up alerts are the most concrete place to start. (A few, like slow LP response patterns, are more accurate with your email connected.) The Acknowledged view shows every cleared alert you have access to, with who acknowledged it and when, and “Unacknowledge” reopens any that need another look.

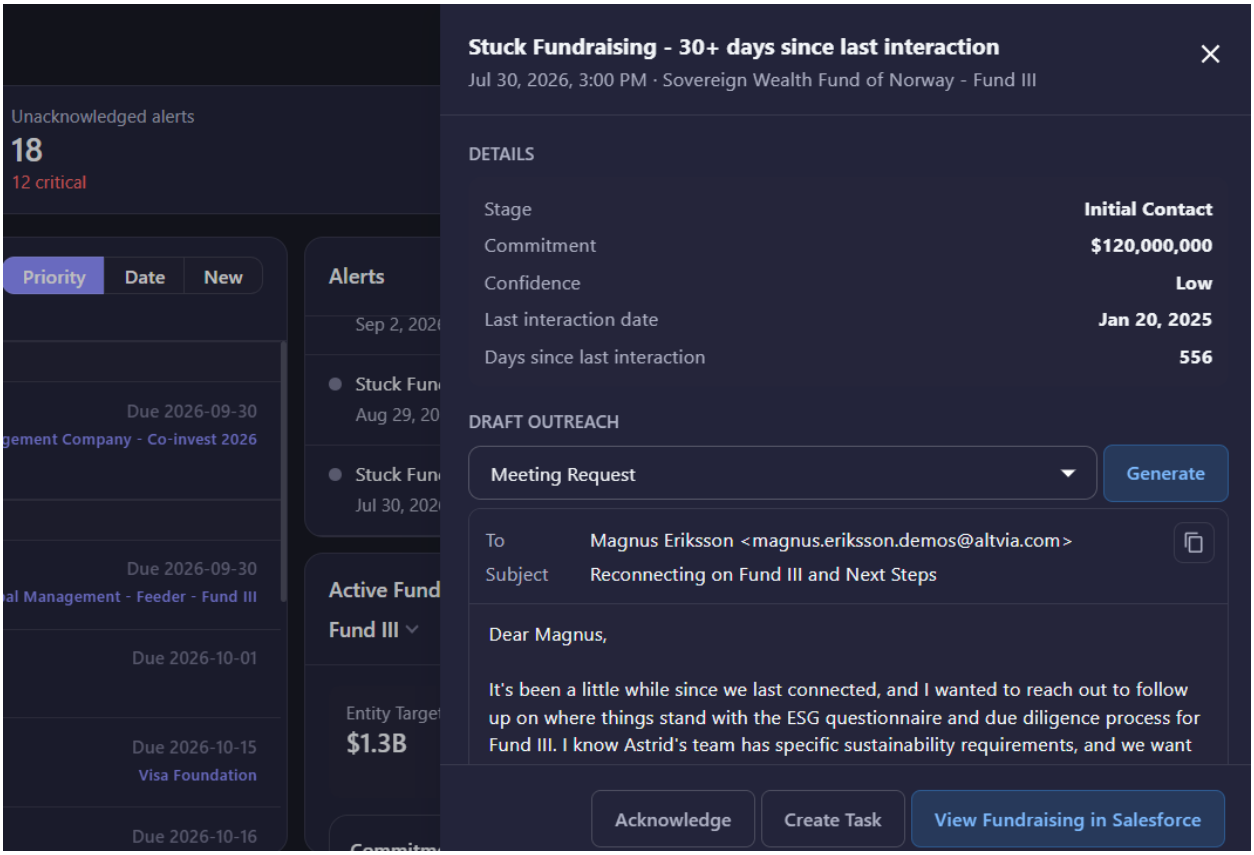
Keep the list short: a few alerts you act on are worth more than many you skim. Rules can run nightly or weekly, so match each one to how urgent it is. When an LP’s Health Score changes overnight, up or down, its Internal Coverage owner gets an alert showing the previous score

next to the new one, with options to draft outreach, create a task, view the record in CRM, or acknowledge it.

HOW TO USE IT

- Open the Alert Center to see your current alerts. Search for one and subscribe or unsubscribe based on what's actually relevant to you. Each rule shows its comparison and threshold, severity, visibility, subscriber count, and a link to the CRM report behind it, so you can see what it checks and who is already subscribed before you opt in.
- To create a new one, select Create New Alert and choose from reports you already have access to.
- Pick from a few suggested alert options based on that report.
- Name it, set its severity, and choose how often it runs: nightly, or weekly on a day you pick. Then save. Nightly alerts fire overnight, so expect to see updates starting the next morning; weekly alerts fire on the day you chose.
- To test a rule without waiting for its next run, open the Action column in the Alert Center and select Run Now. It works on any rule you have access to.
- To clean up a rule that is no longer needed, select Delete from the same Action column. Deleting removes the rule and its subscriptions, but alerts it already generated stay. You can delete rules you created.
- **Admin only:** Mark a rule as global so it appears in every user's Alert Center. Nobody is subscribed automatically, and the alerts it generates only reach the people who chose to subscribe. A global rule can only be deleted by the admin who created it.
- The "Stuck Fundraising, 30+ days since last interaction" alert now shows Internal Coverage in its details, so it's clear who is responsible for that fundraising opportunity.

Communications Drafter



WHAT IT DOES

When an alert on an LP or fundraising record needs a response, IEM can draft the email, ensuring that it is grounded in that relationship's real history, not a generic template. Nothing goes out without a person reviewing and sending it.

HOW TO USE IT

- Open the alert, or select Draft Outreach on the LP's LP360 page, and choose from five starting points: Re-Engage, Re-Up, Advance Commitment, Meeting Request, or LP Update.
- Select Generate. You'll get a subject line and a message addressed to a contact.
- To refine it, use a quick edit (Shorter, Expand, Warmer, or More Formal) or type your own instruction of up to 200 characters. Use one or the other, not both.
- Copy it in one click and paste into the sender's own inbox to edit and then hit send.

GOOD TO KNOW

A draft is not a sent message. Every one still passes through a person before it reaches an LP. If Email Sync is connected, the sent message logs back automatically; otherwise, log it the way

your team does today.

***Admin only:** Firm-level guardrails live in a new Settings tab: a plain-language statement of up to 500 characters about what generated outreach can and can't say. They apply automatically to every draft across the firm. Standard users can't see or edit them.

