altvia

FOR COVERAGE PARTNERS WALKING INTO THE ROOM

Getting started with Investor Engagement Manager

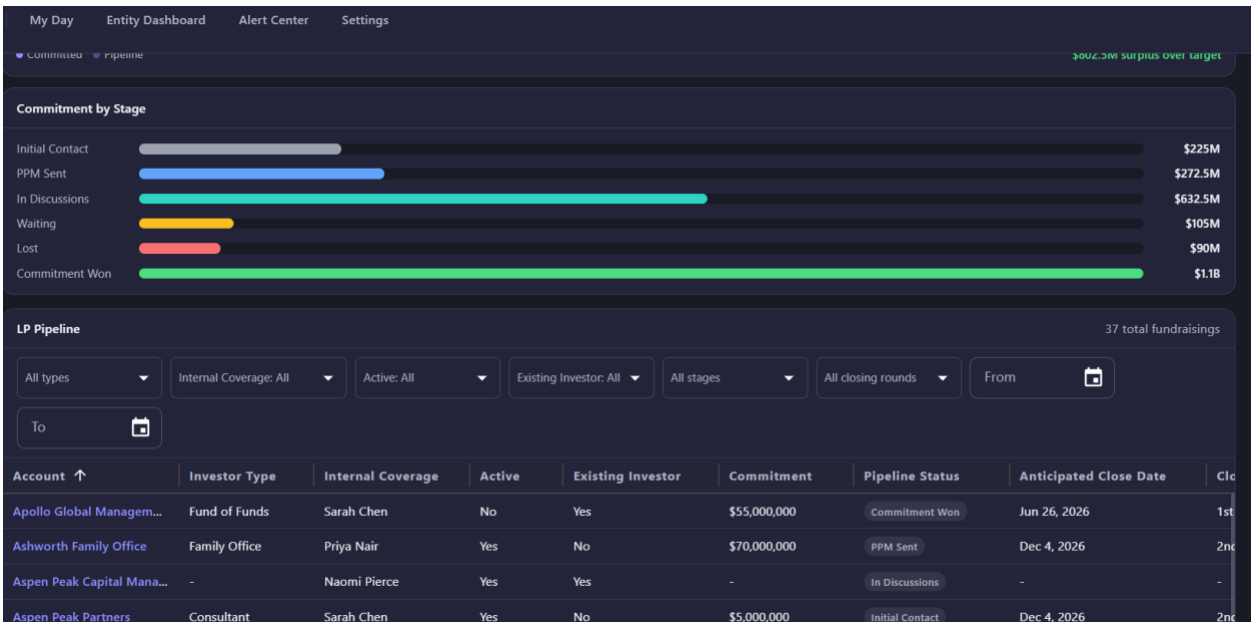
This is built for the moment right before an LP call, when you need a fast, trustworthy answer to “where does this actually stand” without waiting on someone else to pull it together for you. **That’s what IEM is for.** It’s already built to understand your data: it knows what a Fundraising Opportunity is without you having to explain it to the system first. And every LP now carries a Health Score, a quick read on how the relationship is doing before you dial in.

Before your call

1. Open My Day. The snapshot below your Alerts shows progress toward target and current pipeline.
2. Open the Fundraise Dashboard and filter the pipeline table by Internal Coverage, so you see only the LPs assigned to you. Click the investor you're about to call.
3. On their LP360 page, check the Health Score and the signals behind it, then read the recent interactions.

One optional add-on: Syncing your email strengthens a couple of the features below (flagged where relevant), however, it is not required for anything here.

Fundraising Dashboard — start here



WHAT IT DOES

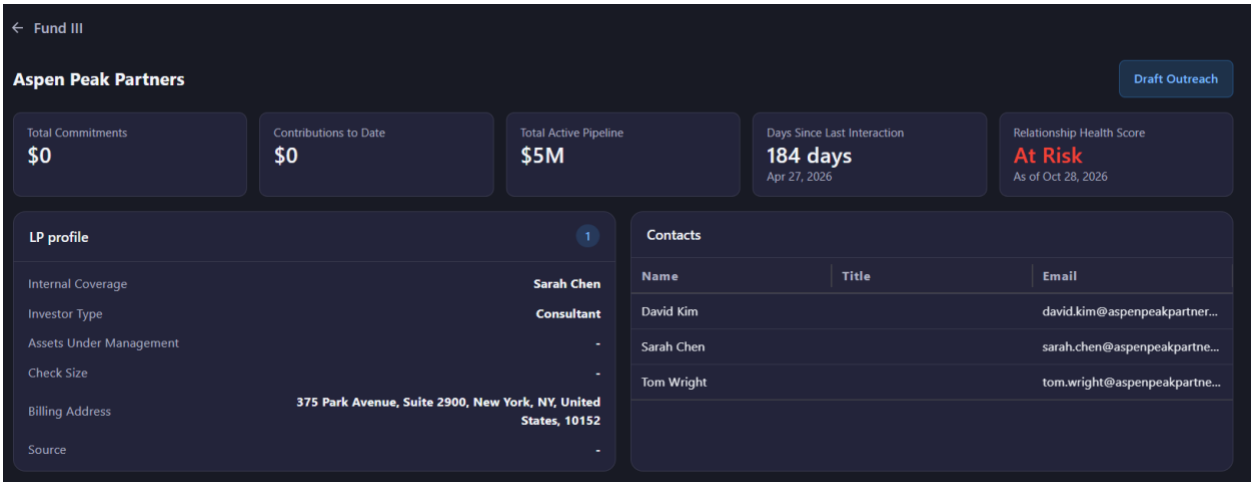
A live view of exactly where a raise stands, current as of right now, not a snapshot someone assembled for you last week. Open it on your way into a meeting and the number you see is the number that's actually true. It also keeps one number that's easy to lose track of when a raise is in motion: Re-Up Conversion: how many of your existing investors have come back in for this raise, as a single percentage. It's an aggregate figure across the raise, not a per-investor score.

> Re-Up Conversion appears on the Fundraise Dashboard alongside your target and committed totals. The sub-line always shows the count behind the percentage, so you have the denominator if someone asks in the room.

HOW TO USE IT

- Frm the 'My Day' tab for the snapshot: progress toward target and current pipeline, right below your Alerts. This is the two-minute check before you walk in.
- Need more details such as a specific investor's stage, or who owns the relationship? Open the Active Entity (Fund) Fundraise Dashboard and the pipeline table. Filter by Internal Coverage to see your own LPs.
- Click any investor's name in the table to open their LP360 page, with every commitment, contact, note, and interaction in one place. See LP360 below.
- If a commitment, stage, or close date has changed, update it right there. Editing a row also lets you update Next Steps and Notes, just below the Closing Round field. Any changes to the record sync back automatically, so whoever looks at it after you sees the same true picture.

LP360



WHAT IT DOES

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

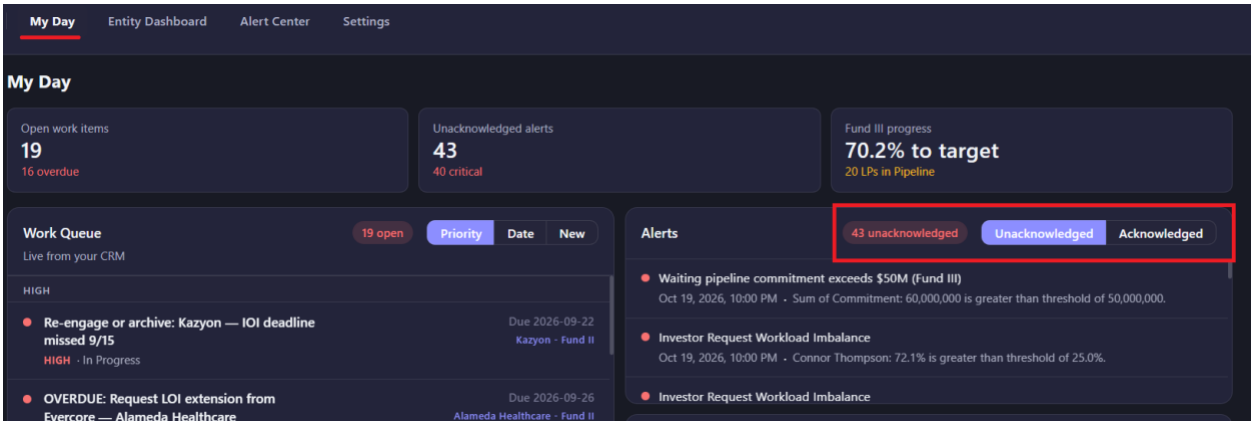
Each LP360 page also shows a Health Score: Strong, Stable, At-Risk, or Insufficient when there isn't enough data yet. It's recalculated overnight from three signals: how often you've engaged with the LP, their commitment history, and momentum across their open fundraising

opportunities. Click into any signal for a plain-language explanation and the CRM records behind it, so you can say why a score is what it is.

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. Select View in CRM to jump straight to the underlying records.
- Expand a commitment under Investor Commitments for the capital account statement behind it.
- Select Draft Outreach to start a note to the LP without leaving the page. See Communications Drafter below.

Alerts



WHAT IT DOES

Intended to be kept deliberately quiet, alerts show important things that actually need your attention, not a constant stream. **The failure to watch for is drift: a call goes unreturned or an LP goes quiet, and nobody notices until it's too late to act**. Alerts are what catch a stalled fundraise opportunity or a gone-quiet LP before it becomes a surprise in the room. Each alert is based on reports that already exist in the system, without the need to constantly refresh and review.

Altvia turns on a few alerts for you automatically, so there's nothing to set up to get started. Two are especially worth knowing for your book. The first fires when an LP's Health Score changes overnight, up or down, and goes to that LP's Internal Coverage owner with the

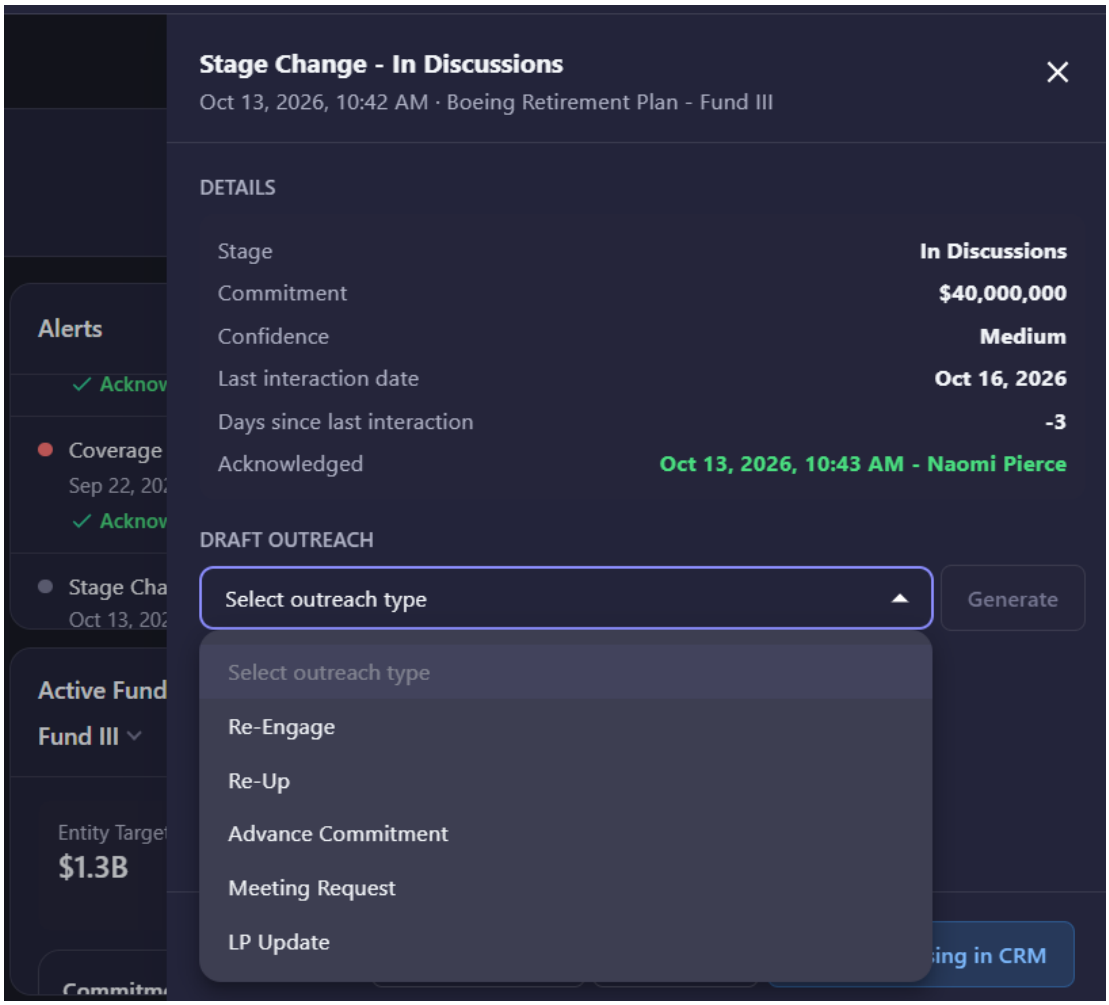
previous score shown next to the new one. The second is “Stuck Fundraising, 30+ days since last interaction,” which lists Internal Coverage in its details so it’s clear who owns that opportunity.

Beyond the presets, you don’t need to build alerts yourself. If you’d like one tailored to what you track, talk to your team’s admin. Admins can create a global alert and share it with the full team, and each person can then subscribe to it from their Alert Center. And keep your list short: a handful of well-chosen alerts works better than subscribing to everything.

HOW TO USE IT

- Open the Alert Center to see what's already tracked. Each rule shows its comparison and threshold, severity, visibility, subscriber count, and a link to the CRM report behind it. Subscribe to the ones that fit your book.
- Once an alert fires, use View in CRM to jump straight to the record that triggered it, Create Task to turn it into a follow-up, or Draft Outreach to start a note. When you've handled it, acknowledge it. Cleared alerts live under the Acknowledged tab, showing who handled it and when, and you can reopen any of them with Unacknowledge.
- If you do build one, select Create New Alert, choose a report you already have access to, and pick a suggested option. You can adjust the comparison, threshold and description, and run Test Alert to see how many records it would create. Then name it, set the severity, and choose nightly or weekly. Weekly suits a rule that doesn't need a daily nudge.
- To check a rule right away, open the Action column in the Alert Center and select Run Now.
- Rules you created can be deleted from the same Action column. That removes the rule and its subscriptions, but alerts it already generated stay. Admins can also share a rule as global: it appears in everyone's Alert Center, nobody is subscribed automatically, and only the admin who created it can delete it.

Communications Drafter



WHAT IT DOES

When a follow-up is overdue on your side after a call, IEM can draft the note that is grounded in that relationship's real history, not a generic template. You still review and send it yourself.

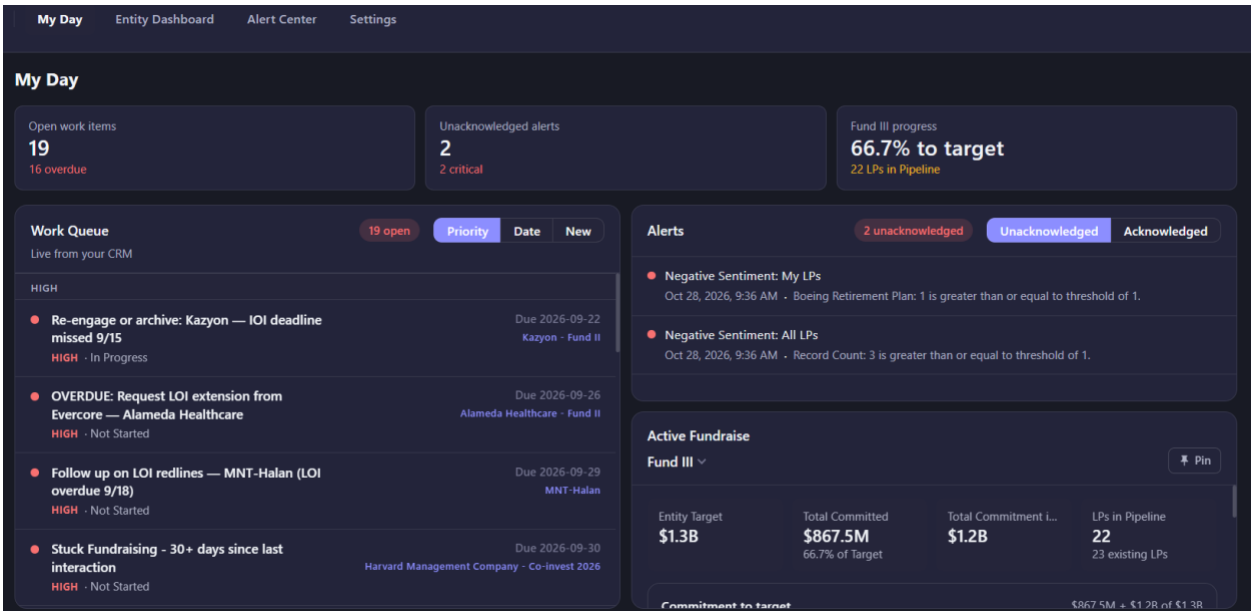
HOW TO USE IT

- Select Draft Outreach on the LP360 page, or open an alert tied to an Account or Fundraising record and you'll see a Draft Outreach section.
- Pick the situation: Re-Engage, Re-Up, Advance Commitment, Meeting Request, or LP Update, then select Generate.
- To refine the draft, 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.
- Review it, edit anything that needs your voice, copy it in one click, and send from your own inbox.

GOOD TO KNOW

Nothing sends itself. This hands you a first draft, not a final answer. Make sure that any email you send is logged in the CRM to show the interaction. If you use Email Sync, your sent message logs back automatically; if not, log it the way you do today.
Admins can set firm-level guardrails 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, and only admins can see or edit them.

My Day



WHAT IT DOES

A running list of open items tied to your coverage: tasks and alerts together. You're not expected to live in this screen; it's here for the moments you want a quick answer to "what's outstanding on my book right now."

HOW TO USE IT

- Open My Day for the list, ranked by priority.
- 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.
- From any alert, select Create Task to turn it into something trackable. This is useful when you want a reminder to follow up, without having to remember it yourself.