altvia

FOR THE PEOPLE WHO OWN THE QUEUE, THE QUARTER, AND THE DATA

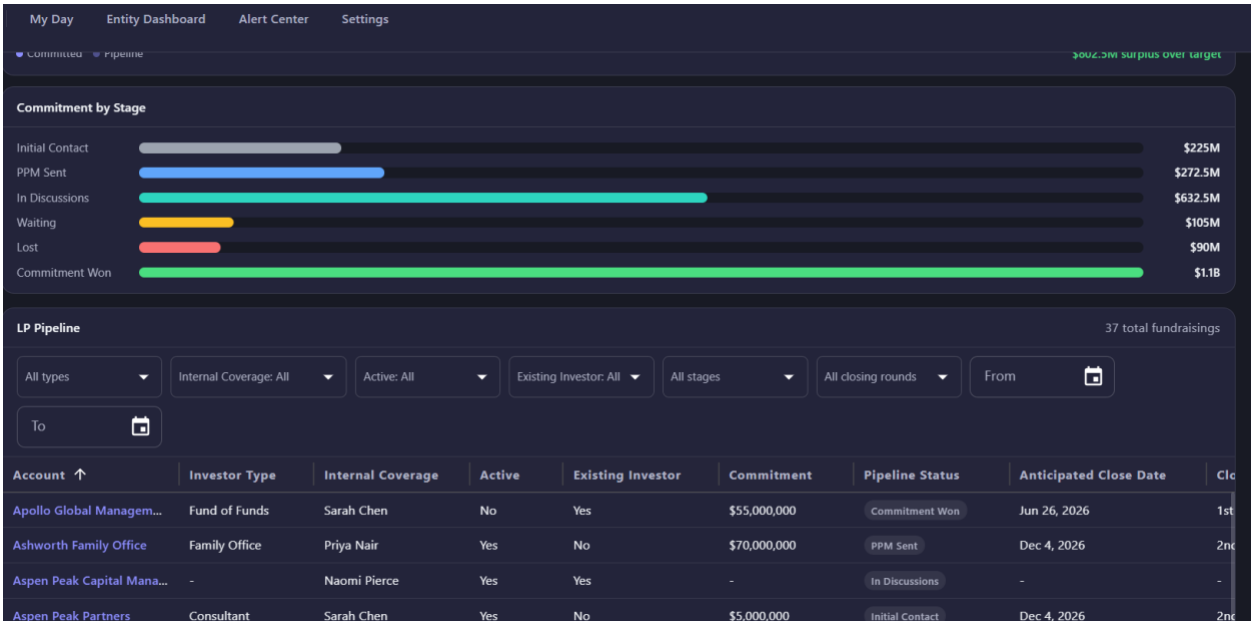
Getting started with Investor Engagement Manager

You're the one who has to answer for how the last raise actually broke down and where the current pipeline stands: which LPs are in, which are circling, which went cold, and why. **That's what IEM is for.**

IEM cuts down on manual assembly and streamline the fundraising workflow, not add another system you have to reconcile your pipeline against. It's also built to already understand your specific setup: it knows what a fundraising opportunity is without you having to map it there yourself, and because it's built on your actual data, it's a source you can trust rather than one more thing to double-check. Health Score and Draft Outreach work together: check why an LP is where they are, then draft your note from the same page, so you're never writing without knowing why the LP is on your list.

One optional add-on Connecting your email strengthens a couple of the features below (flagged where relevant). Not required, but most useful if your day starts in your inbox: with Email Sync, the drafts you send log back to the CRM automatically.

Fundraising — start here



WHAT IT DOES

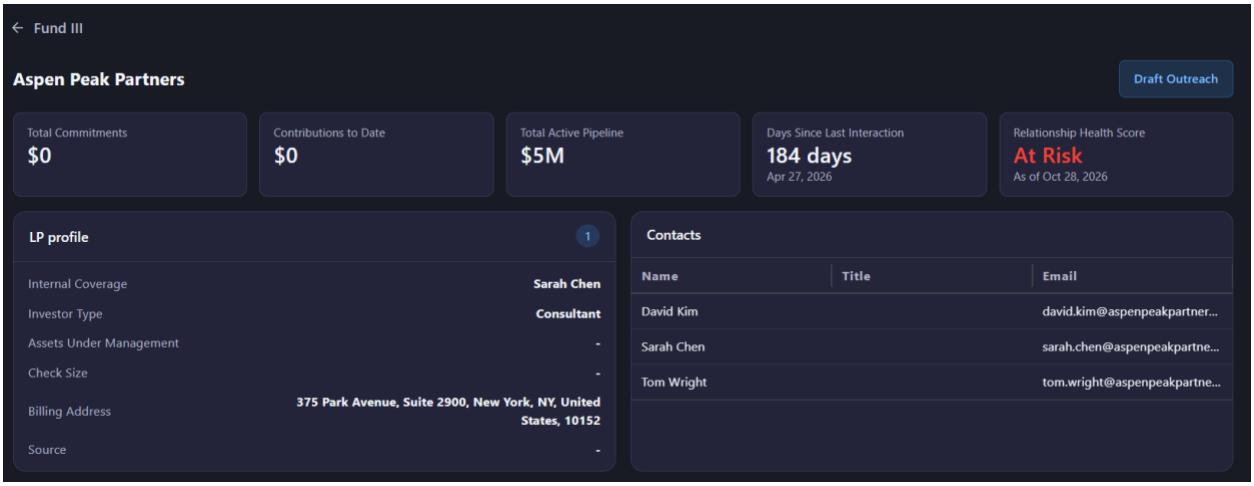
A live, filterable view of every investor in the pipeline, reflecting what's actually in your CRM, not a snapshot that goes stale the moment someone updates a record elsewhere.
This is the piece that replaces rebuilding the pipeline in Excel every meeting or quarter end. Some teams put upwards of 60 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.

> Re-Up Conversion sits on the Fundraise Dashboard beside target, committed and pipeline totals. The sub-line carries the count behind the percentage, so the denominator is always in view when you're asked to defend the number.

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.
- 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 a fundraise opportunity is actually closed, so the pipeline and the system of record never disagree.

LP360



WHAT IT DOES

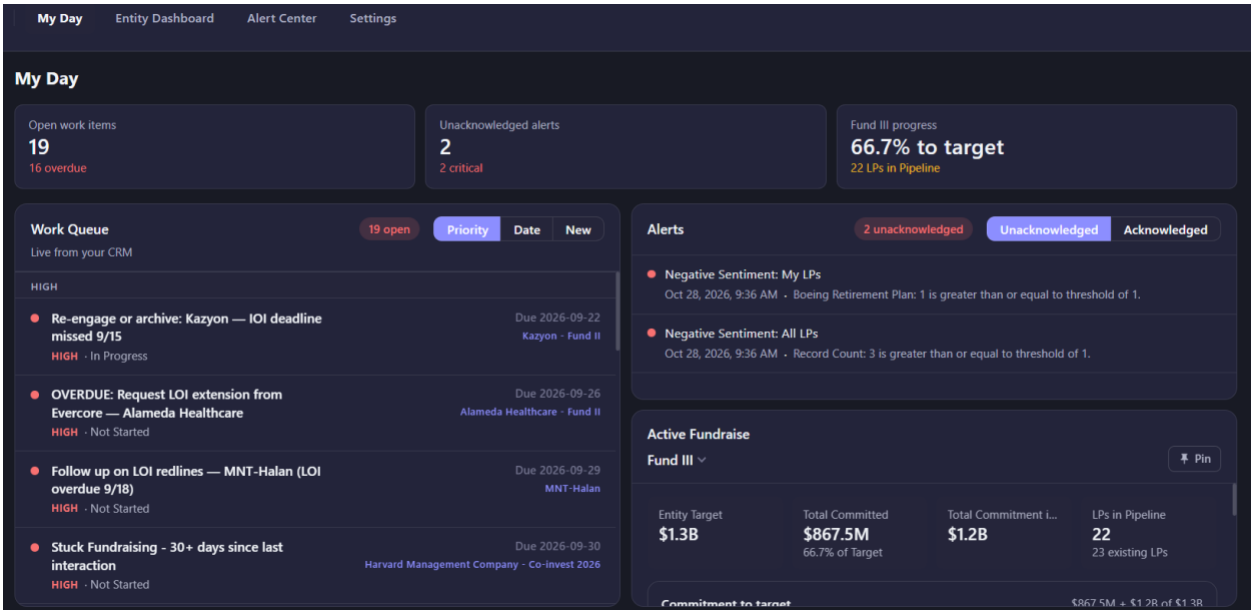
Everything about an LP now lives on one page: commitments, contacts, notes, fundraising history, and recent activity. Expand any commitment for its capital account statement (contributions, distributions, IRR, and the underlying transactions) without leaving the LP's record.

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, and the score shows Insufficient until there's enough to go on. Click into any signal for a plain-language summary and the records behind it, which is the trail to follow when someone asks why an LP is flagged. 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.
- Before you draft anything for the LP, take a look at the signals first. Then select Draft Outreach to start the email from the same page. See Communications Drafter below.

My Day: your queue, in one place



WHAT IT DOES

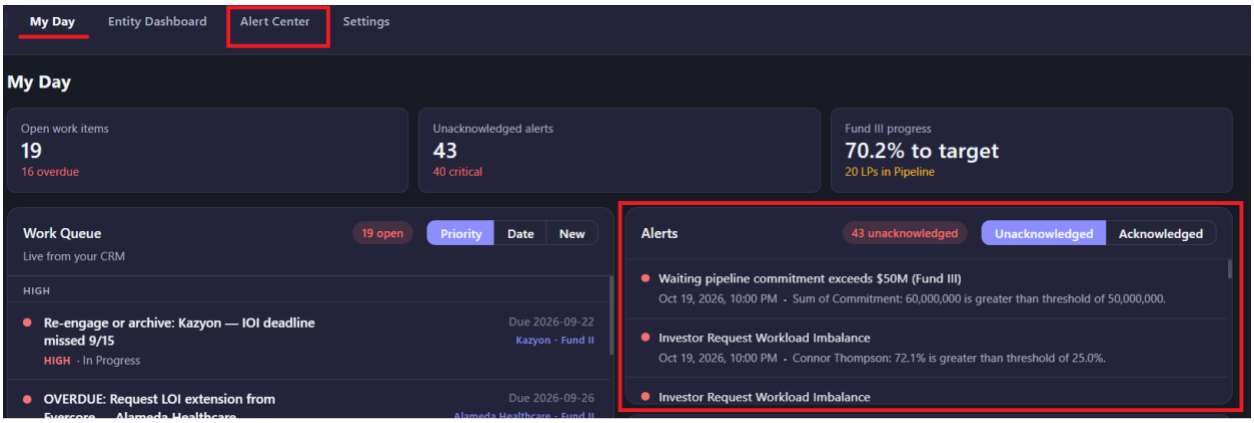
A single, prioritized view of what's outstanding. This view is built to answer "what's late, what's mine, what changed" without assembling it by hand.

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, the same detail you'd otherwise find by opening the alert. Alert titles no longer start with a category label, which leaves more room for the title you gave the rule.
- 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.)

Keep the volume low: a handful of alerts you act on is worth more than a long list you skim. Each rule can run nightly or weekly, so put slower-moving checks on a weekly schedule. Admins can also share a rule as a global alert, which appears in everyone’s Alert Center for people to subscribe to if it’s relevant.

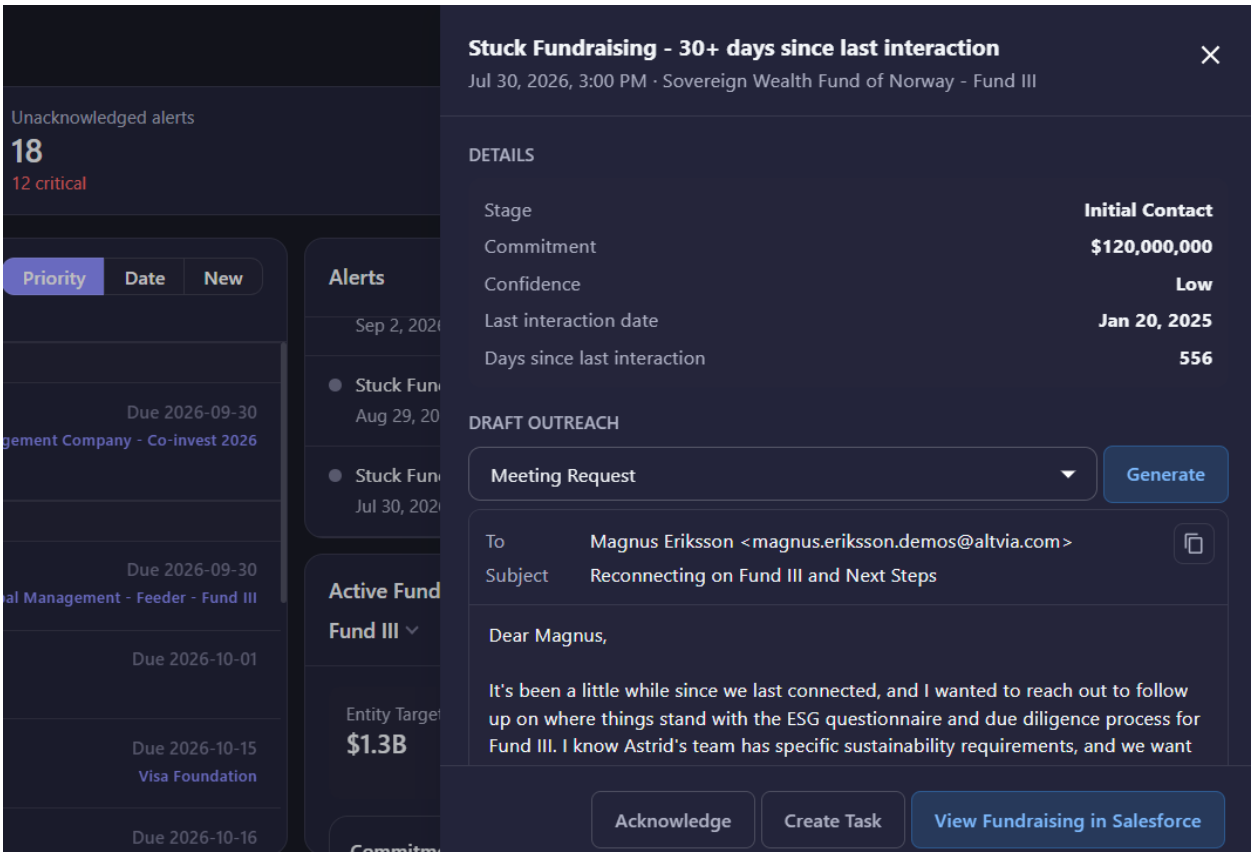
HOW TO USE IT

- 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 new rule or check on one 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, including personal and global rules.
- To remove a rule you no longer need, select Delete from the same Action column. Deleting removes the rule from the Alert Center and clears its subscriptions across users. Alerts it already generated stay. You can delete rules you created; a global rule can only be deleted by the admin who created it.

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

- Start on the LP's LP360 page and check the Health Score signals, so you know where the relationship stands and why.
- Select Draft Outreach on that page, or open an alert, 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.
- Adjust it with 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. Try these before rewriting by hand.
- Review and edit it right there, then copy it in one click and paste into the sender's own inbox to 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.

Firm-level guardrails are set by admins 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, so drafts start inside the boundaries your firm has set. Only admins can see or edit them, so standard users won't see this tab.

