altvia

FOR THE PEOPLE WHO NEED TO KNOW WHERE THE RAISE STANDS

Getting started with Investor Engagement Manager

You're not in the CRM every day, and you shouldn't have to be. What you need is a fast, defensible answer to where the raise stands and what's at risk, without asking someone to pull it together or waiting until it shows up in a board deck. **That's what IEM is for.** Plus, it keeps your team's day-to-day work current underneath, so what reaches you is already up to date.

Three answers without asking anyone

1. WHERE THE RAISE STANDS

Fundraising is a live view of the raise the moment you open it, reflecting what's actually in your CRM, not a snapshot that goes stale the moment someone updates a record elsewhere. Open the Overview page for fund target, committed, pipeline, and LP counts. Re-Up Conversion sits on the Fundraise Dashboard beside them: how many of your existing investors have come back in for this raise, as one aggregate percentage. The sub-line carries the count behind the percentage, so the denominator is in view when you're asked to defend the number. It replaces rebuilding the pipeline in Excel every meeting or quarter end, work some teams put upwards of 60 hours into.

2. WHERE A RELATIONSHIP STANDS

Every LP360 page 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 your team has engaged with the LP, their commitment history, and momentum across their open fundraising opportunities. Click into any signal for a plain-language summary and the specific records behind it, so you can see why a score landed where it did. The summary refreshes whenever it is more than a day old, so the explanation always reflects current data. A new LP, or one with a thin history, isn't penalized for it.

3. WHAT'S DRIFTING

Alerts mean your team catches a stalled fundraise or a quiet LP early, instead of you hearing about it after it's already a problem. When an LP's Health Score changes overnight, whether up or down, its Internal Coverage owner gets an alert showing the previous score next to the new one. That is how a slipping relationship gets caught the morning it happens, not weeks later in a review. The "Stuck Fundraising, 30+ days since last interaction" alert also shows Internal Coverage in its details, so it's clear who is responsible for that opportunity.

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

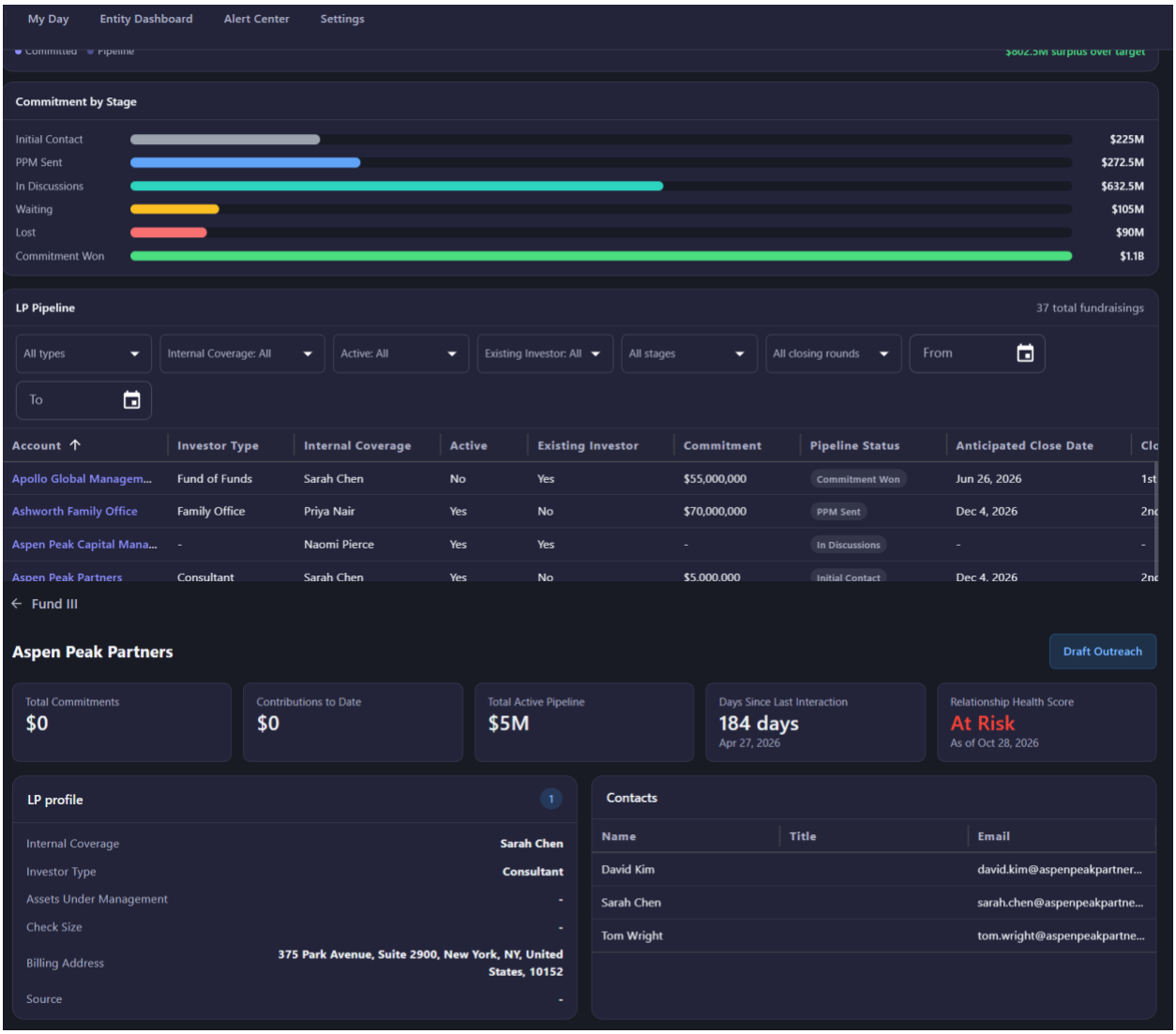
What you control

Two settings are admin-only, and they let a firm set the rules once for everyone.

- **Outreach guardrails.** In a new Settings tab, admins can write a plain-language statement of up to 500 characters about what generated outreach can and can't say. It applies automatically to every draft across the firm, so every generated email stays inside the boundaries your firm sets, enforced up front rather than reviewed after the fact. Standard users can't see or edit it.
- **Global alert rules.** Admins can mark a rule as global. 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. Only the admin who created a global rule can delete it.

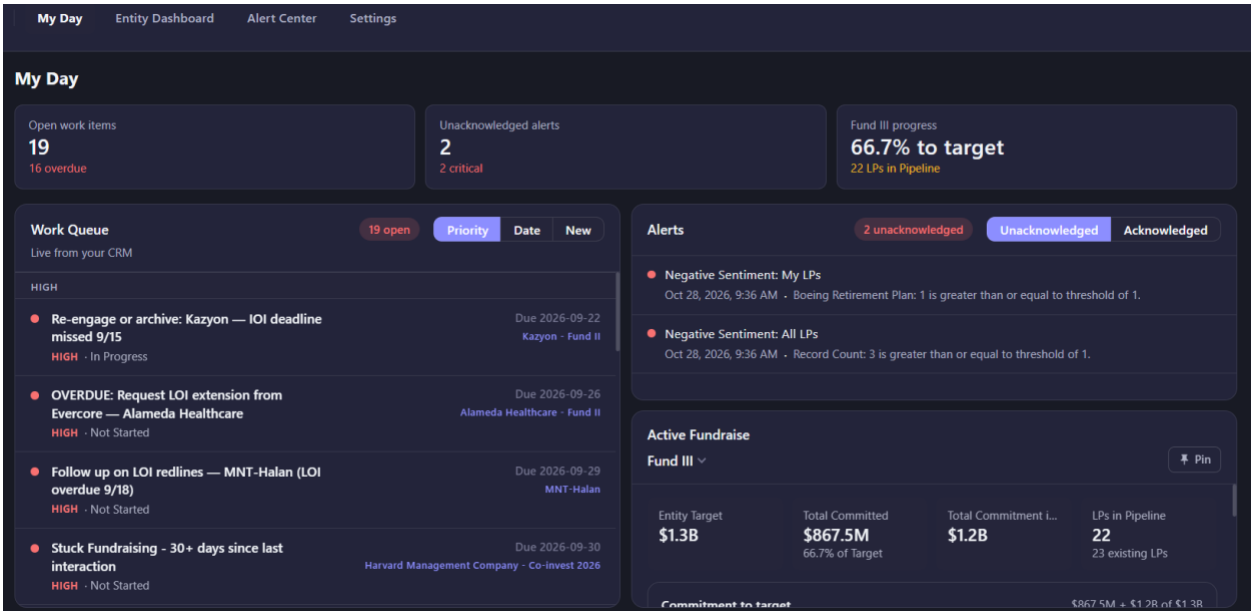
What your team uses day to day

Fundraising Dashboard and LP360



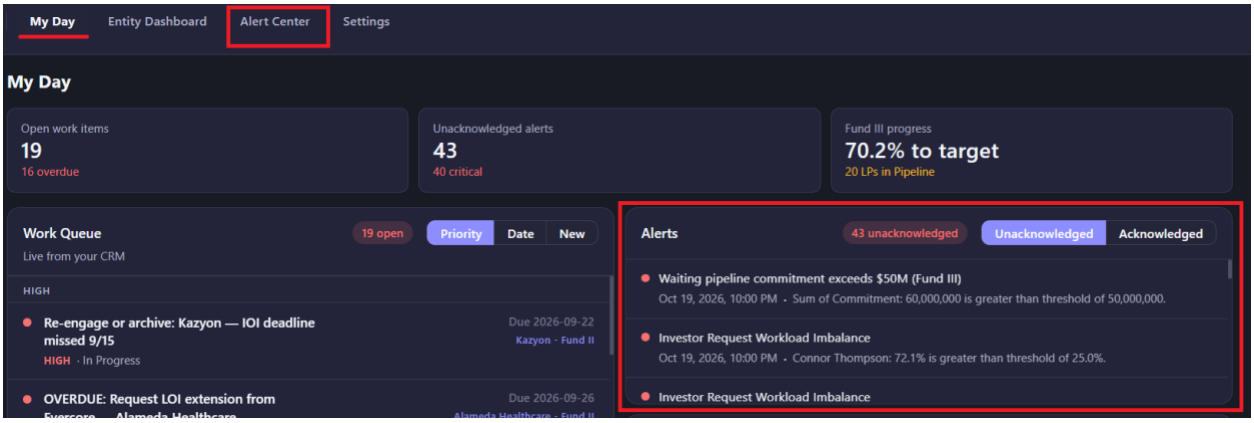
The pipeline table is filterable by type, status, stage, close date, and internal coverage. Your team can update commitment value, stage, close date, Next Steps, or Notes directly (Next Steps and Notes sit just below the Closing Round field when a row is edited), and changes update the CRM immediately, so there's no separate reconciliation step. Everything about an LP, including capital account statements, lives on one LP360 page. Use Convert to Investor Commitment once a fundraise opportunity is closed. It is intended for a single fundraising → single investor conversion; if your team uses the '+Investors' button in the CRM to convert one opp into multiple records, keeping that workflow is best for now.

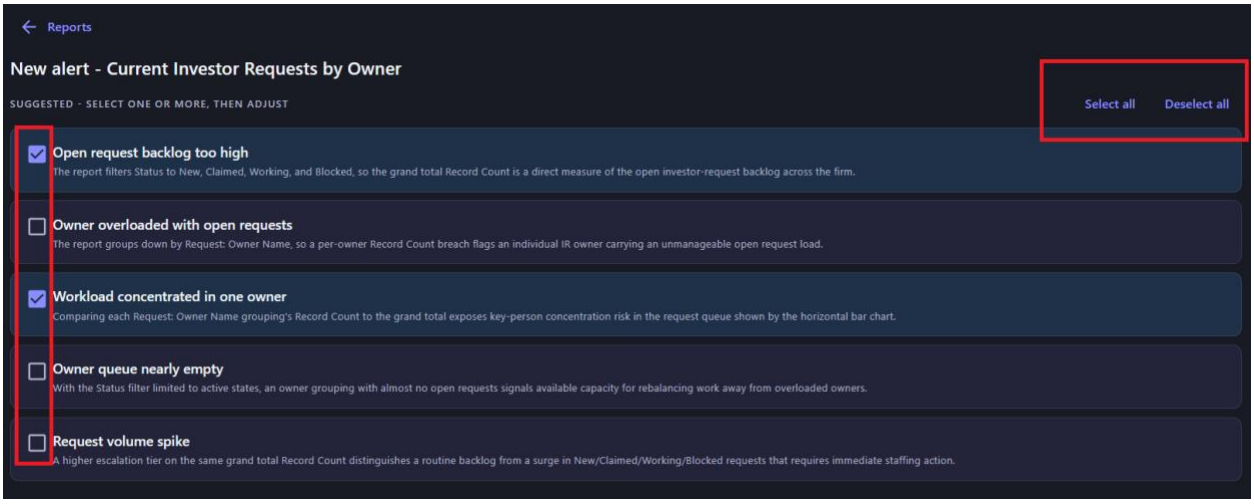
My Day



A single, prioritized view of what's outstanding, answering "what's late, what's mine, what changed" without assembling it by hand. Alerts and tasks sit together, and an alert becomes a task with one click. Each alert in the Alerts panel now shows the specific detail that triggered it.

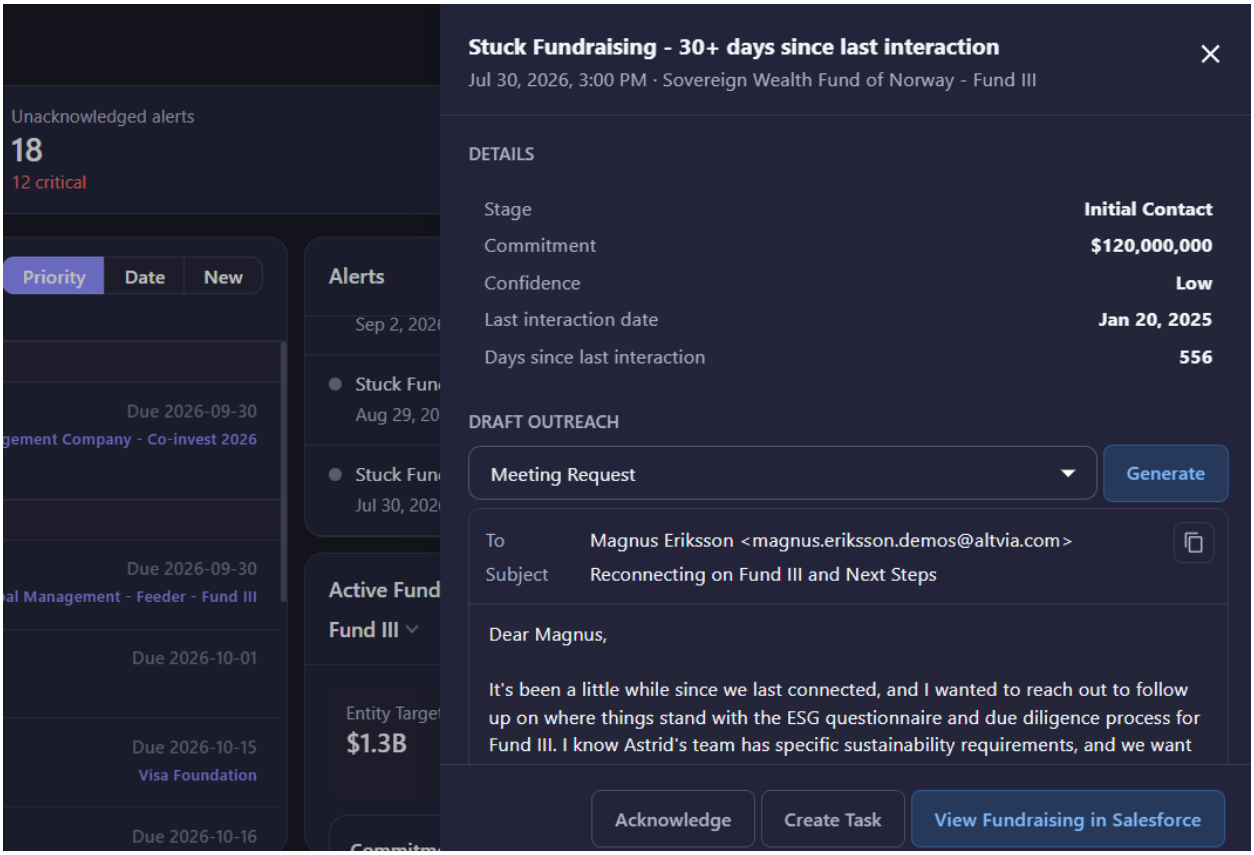
Alerts





Alerts turn a report your team already runs manually into something that watches itself, catching a problem during the quarter instead of during close. Each rule can run nightly or weekly. Teams can test a rule on demand with Run Now, and delete rules they created from the Action column; alerts a deleted rule already generated stay. (A few signal types, like flagging slow LP response patterns, are more accurate with Email Sync enabled.)

Communications Drafter



When an LP needs a response, IEM drafts the email from the LP360 page or from an alert, grounded in that relationship's real history. Quick edits (Shorter, Expand, Warmer, More Formal) or a 200-character instruction refine it. Nothing goes out without a person reviewing and sending it, and if Email Sync is connected, the sent message logs back automatically.