CASE STUDY

SmartRoom™

Heritage Group Streamlines Investor Communication and Enhances Portal Experience with SmartRoom LP Portal & DealCloud CRM Integration

ABOUT FIRM

HERITAGE GROUP
PARTNERS IN HEALTHCARE

Heritage Group is a Nashville-based, healthcare-focused investment firm with more than 30 years of experience financing and operating healthcare companies at all stages. The firm's limited partners include leading hospital systems, payers and other healthcare organizations that operate over 10% of the hospitals in the U.S., insure over 45 million people and deliver pharmaceuticals and medical products to more than 100,000 locations daily.

CALL-TO-ACTION

In preparation for their third fund, Heritage sought a more robust CRM solution that would help to better track and manage relationships with the firm's growing number of strategic investors.

Heritage also needed to make a decision about their investor portal. They were using their existing CRM provider's portal solution, but felt it lacked the ease-of-use and mobile experience they wished to provide their LPs. Ideally, they wanted an integrated solution that would help reduce manual processes and create greater transparency with investors.

DECISION

Heritage ultimately chose DealCloud as their new CRM provider, along with SmartRoom, DealCloud's investor portal partner, which could be integrated into the CRM platform. By connecting the two technologies they could reduce administrative work by managing all user provisioning and security settings within a single source.

PROCESS

After migrating from their existing CRM to DealCloud, Heritage was ready to set up their new investor portal with SmartRoom. They were assigned a dedicated SmartRoom Project Manager who worked alongside the Heritage team to help:

CONNECT DEALCLOUD

Liaison between the DealCloud team to ensure the integration between the two platforms was setup correctly, including security settings that control what fund/investor details are made available to any specific investor or contact.

CUSTOMIZE PORTAL EXPERIENCE

Setup the portal design to match Heritage's branding and ensure the most optimal experience for all investors.

OPTIMIZE REPORTING PROCESS

Understand the firms existing workflows to identify ways to drive greater efficiency with reporting tools and features.

The level of customer service and support we've received from our project manager is a 10 out of 10. She has been instrumental in driving this entire process and making it all come together. She was there at every step, working through all the details to ensure we up and running smoothly.

- Florence Chassaignac,
Director of Operations,
Heritage Group

SOLUTION

Utilizing SmartRoom's SmartLP reporting tools, Heritage was able to implement a new portal to automate and optimize:

FINANCIAL STATEMENT DISTRIBUTION

Using the "SmartMove" tool, Heritage can now upload all investor financial statement documents into a secure, centralized folder and then automate their distribution into each individual investor's designated portal.

CAPITAL CALLS/DISTRIBUTION NOTICES

Investor information can be mapped from fields in an excel file into a report template document to create customized PDF reports for each investor with the "SmartMerge" tool. It then automates their distribution into each individual investor's designated portal.

INVESTOR EMAIL NOTIFICATIONS

Automated alerts instantly notify investors via custom, Heritage-branded email templates when new information is available in the portal.

INVESTOR EXPERIENCE

Heritage can now deliver real-time fund information and dynamic reporting LPs can access through an intuitive portal anytime, anywhere.

RESULTS

SmartRoom helped Heritage Group:

STREAMLINE WORKFLOWS

Integrate SmartRoom and DealCloud technologies to eliminate redundancies and create a single source of truth for all investor management and provisioning.

SAVE TIME

Reduce administrative tasks and create a more efficient process across multiple types of investor correspondence.

IMPROVE LP EXPERIENCE

Provide investors better accessibility to information they need.

SmartRoom has helped streamline and simplify our entire process. We've saved a lot of time on capital calls and distributions, and expect to see even more time savings as we continue to optimize our workflows. I love how intuitive and organized the platform is. We're happy we can deliver such a user-friendly experience to our LPs.

- Florence Chassaignac
Director of Operations
Heritage Group

SmartRoom™

TRANSFORM THE INVESTOR EXPERIENCE WHILE IMPROVING OPERATIONAL EFFICIENCY

Today's investors demand greater transparency. Operating out of Excel will no longer cut it. As GPs face growing pressure from LPs to provide real-time access to better reporting data, SmartRoom's SmartLP solution can help. Much more than an investor portal, it's a centralized investor services platform that automates the distribution of fund information and reporting data to investors in real-time, creating a simplified experience for both investment managers and investors alike.

LEARN MORE

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