

Responsiveness and agility key to success

SS&C Intralinks: Best Investor Relations Technology

Requests for more data and transparency are changing the private equity landscape. These demands have become burdensome from the general partners' (GPs) perspective so the need for efficiency on this front has been pushed to the fore.

"Although these demands have been on the rise for the past few years, they increased pretty rapidly over the last year," comments Bob Petrocchi, senior vice president and co-general manager of SS&C Intralinks. "I think, because we were operating remotely, these requests were compressed in terms of timeframe. We also observed heightened levels of expected responsiveness. In this context, our ability to be agile and address these needs promptly served us well."

The firm invested heavily into its portal to facilitate the provision of the level of transparency limited partners (LPs) are demanding of their managers.

Petrocchi outlines: "One of the challenges we faced, and overcame, was integrating our services into GP's systems and transforming them into more of a portal environment where LPs can download data. This helps alleviate transparency concerns by investors and streamline the process. Having the ability to interact [in] real time with a portal has been very helpful in dealing with some of the transparency challenges in the relationship between LPs and GPs."

SS&C Intralinks will continue to develop new tools and solutions, while maintaining investment in its existing offerings to make sure it can provide value-add across the entire ecosystem. Petrocchi details: "We're currently giving companies the ability to interact with our systems. The next step will be to provide actionable insights in a format that is easy to consume."

"One example of this innovation is the integrated investor onboarding tool. This automates the whole registration and documentation process and will be directly accessed through the SS&C platform. It's a natural extension of our fund-raising offering."

Fund managers' main objective is to create value for LPs, attracting and engaging investors. In view of this,



Petrocchi highlights: "We believe SS&C Intralinks is uniquely positioned to understand the priorities and challenges faced by fund managers. Given that we sit at the centre of the alternative investment ecosystem, we feel we're the only alternatives provider to offer a full end-to-end platform that's going to meet the needs across the fund managers' entire organisation."

"Our healthy GP and LP community is what has made our firm successful and built a level of brand recognition.

They have helped us keep a close eye on what is happening in the PE space and adapt our services and solutions accordingly."

This community is the largest in the industry and Petrocchi believes it really sets the firm apart: "We have over 240,000 LPs logging onto our platform every day and over 1,500 fund manager clients using our solutions to communicate to LPs."

Given the growing role of technology in the PE space, a firm like SS&C Intralinks is well placed to provide support. "Typically, adoption has been slower, but players have now been forced to become more familiar with technology and how to use it."

"Technology makes the whole PE process move quicker and it can also reduce the time to close. We're proud to say our Intralinks platform facilitated more than one out of every two dollars raised globally in private capital last year," Petrocchi underscores. ■

Bob Petrocchi
Co-President, SS&C Intralinks



Bob Petrocchi is the Co-President of SS&C Intralinks. In this role, Bob is responsible for the end-to-end management of the organisation along with Ken Bisconti. He formerly served as Chief Revenue Officer and the Head of Sales for Intralinks. Prior to joining SS&C, Bob was the Managing Director of Financial Services at Microsoft where he drove transformation to the cloud for Microsoft's largest financial services customers representing ~USD500 million in annual revenue. In addition to his work at Intralinks, he is a member of the Board of Trustees at Eden Autism Services and an active member and coach in the Special Olympics community.