



Streamlining Client and Investor Communication

Learn how organizations in financial services are using Intralinks® solutions to improve productivity, security and the client experience.

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Introduction

SaaS solutions continue to transform the financial services industry, helping firms bring more value to their clients at lower costs. Back-office teams used to spend thousands of hours collecting, organizing and delivering information to investors via hard copy mail or email. Today, the end-to-end process is quick and painless—and it's preferred by clients.

The following examples show how financial institutions globally are using Intralinks solutions for Client and Investor Communication to free up resources, enhance security and improve the overall customer experience.



A new client communication strategy

The Situation

Ares Management LLC is a global alternative asset manager and SEC-registered investment adviser, headquartered in Los Angeles. Ares was looking for a complete revamp of its IT environment to support exponential growth in both size and assets managed.

The firm needed to standardize information-sharing systems to promote widespread adoption among its investors. Additionally, the solution needed to work equally well to meet the needs of the people raising the funds, the people making strategic transactions and the people reporting back to the investors.

The Solution

Intralinks provided a streamlined solution that could easily be configured for a wide range of uses. The solution allowed for flexibility, security and widespread adoption among its investors.

The Benefits

- Streamlining the process made it easy for people to use Intralinks, with the number of Intralinks users from Ares more than tripling, from roughly 900 to over 3,000
- Use of other, less-secure sharing platforms eliminated, preventing possible security breaches
- Single sign-on and integration with other internal applications, saving time and automating processes
- Branding capabilities, allowing for engagement with clients

“Standardizing on Intralinks for file sharing has reinforced security, compliance and audit control... We know who accessed the file; we know if they had permission, we know if they forwarded it to someone.”

– Lei Lu, Ares Senior VP, Head of Technology

\$66B Number of transatlantic deals in the company's first 25 years of business

3:1 Ares uses Intralinks® for three stages in the lifecycle of fund management: fundraising, strategic transactions and reporting

244% Year-over-year growth in the number of Intralinks users at Ares Management

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The Situation

TVM Capital, one of Germany's first venture capital firms, wanted to improve investor communications and streamline operations between its offices in Germany and the United States.

Every year, the firm spent considerable time and money delivering distribution notices, tax information, personalized financial statements, news and updates to its global investor base. Often, investors couldn't find the information when they needed it. The firm sought a way to quickly distribute information that investors could access when they wanted.

The Solution

Rather than build its own solution, TVM found that Intralinks could provide the security and features of in-house options with the lower costs and maintenance requirements. In addition, Intralinks' reliability and dedication to customer support were second to none.

The Benefits

- Streamlined business operations and increased overall efficiency, saving time and increasing productivity
- Eased internal and external communications, better connecting employees across time zones and physical borders

"For our peace of mind and that of our investors, we needed a completely secure way to store and distribute our most confidential information. That is exactly what we have with Intralinks."

- Joseph Moosholzer, Partner, TVM Capital

30 Number of transatlantic deals in the company's first 25 years of business

6 Number of TVM's funds totaling €1.3 billion

24/7 Now, how information is available to investors

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The Situation

At the heart of every strong venture capital investment is a profound commitment to partnership, not only within a firm, but also with entrepreneurs and limited partners (LPs). With collaboration comes the need for excellent communication. On the investor relations side, RockPort constantly strives to improve the way in which information is distributed to its investors. RockPort's previous investor communication platform was not living up to the firm's expectations.

The Solution

To provide an easier way for LPs to obtain investment updates, RockPort deployed the cloud-based Intralinks investor reporting portal. Intralinks Fundspace supports 120 users across two investment funds, providing RockPort's LPs with quick, hassle-free access to quarterly reports, account statements, K-1s, distribution notices, capital call notices, and more. Intuitive dashboards streamline the uploading process for RockPort, allowing LPs to securely log in from anywhere, anytime to see their fund information in one place.

The Benefits

- Streamlined process for uploading reports with consistent results every time
- Easy, reliable and secure solution for investor reporting
- Brand consistency – Intralinks' template picks up the same design there as RockPort's website

"It's beautiful how Intralinks Fundspace lets you just upload documents and send out an email alert to the LPs. All they have to do is click on a link to get their updates. It makes life so much easier for us and our investors."

– Bettina Metais, Investor Relations Director, RockPort Capital

80% Number of transatlantic deals in the company's first 25 years of business

1 Minute instead of ten minutes to upload investment reports

0 Trouble calls compared to ten-plus per month

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