Yardi InvestorPlus

A platform for front office users to quickly analyze investor, fund and portfolio key metrics, communicate with investors and manage fund raising and deal tracking.

YARDI

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Yardi InvestorPlus serves your investors and managers of funds, assets and portfolios by supporting relationship management and delivering business intelligence directly to their smartphone and tablet devices via the cloud. This front office solution's CRM functionality automatically tracks investor information, activities, tasks and correspondence. User-defined dashboards and analytic reports provide portfolio-wide transparency and help your team quickly answer inquiries at any level within your organization's investment structure.

Better Decisions

InvestorPlus puts performance data at your fund or portfolio manager's fingertips with configurable dashboards and data drilldown. Dynamically calculate returns and compare them against benchmarks with limitless attribute combinations at any investment level. Quickly respond to performance inquiries from stakeholders with confidence and pinpoint accuracy using robust filters and exportable calculations detail. With all data residing in Yardi Voyager, nothing is lost in translation.

Greater Visibility

InvestorPlus increases visibility into your fund raising activities by providing a holistic view of prospects, proposals and fund raising goals. Capture valuable contact information with unlimited user-defined attributes and convert them into leads with the click of a button. Quickly match leads to viable opportunities via robust requirement-matching tools. Track deal progress and terms through configurable dashboards tailored to every user. Once a commitment is signed, convenient links to the original proposal ensure that you never lose track of the details.

Improved Relations

Our mobile-ready solution allows your client-facing staff to manage investor activities on the go. Respond to inquiries using configurable dashboards that display key performance metrics and up-to-the-minute transactions. Generate documents, emails, tasks and events and synchronize them with Microsoft® Outlook. Record valuable meeting notes and update investor profiles from a single location, freeing your team to focus on managing relationships.

Configurable and interactive dashboards provide your management team with relevant business intelligence.

Key Features

- Easy navigation to prospect and investor information via dashboards

- Real-time access to all investor and prospect-related activities

- Quick data entry with deal wizards

- Reporting and analytics across the investment lifecycle

- Outlook integration for email, contacts and calendar items

- Portal integration for real-time availability and document sharing

Key Benefits

- Allows you to easily evaluate the investment health of portfolios, funds and assets against key performance indicators and industry benchmarks

- Enables drill down into portfolio risk and exposure by your choice of attributes with user-defined ad-hoc analysis

- Creates process efficiency with instant access to investor activities, notes and correspondence

- Allows you to monitor fund raising goals with a holistic view of prospects and proposals through configurable dashboards

- Reduces effort and saves time with convenient document and email generation tools and Microsoft® Outlook integration

- Leverages the latest in responsive design to provide easy access on any mobile device

- Automates the exchange and management of information through the acquisition and disposition process

⅄YARDI | Energized for Tomorrow

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