

# Dynamo & SPI Advisory | A Client Success Story

## Seeking a Productive Transformation

Strategic Property Investment (SPI) Advisory, recognized for its proficiency in managing broadscale investor relations and fundraising in the multi-family real estate sector, faced significant limitations with their previous investor management tool. The tool lacked flexibility, requisite fields, and efficient process pathways, requiring extensive manual workarounds and resulting in considerable time and resource allocation. To overcome these challenges and effectively scale their operations, SPI Advisory meticulously reviewed nearly 20 products on the market before turning to **Dynamo Software**.



“ I selected Dynamo because I could see it was a flexible platform that would give us as the business full access to configure not just background settings but database fields, the user interface, workflows, and features to fit our specific business needs, Jennifer Warder, Principal of SPI Advisory emphasized. ”

### The Before...

SPI Advisory grappled with a tool that did not evolve with their growing needs, particularly there were four key challenges their current software could not address:

1. Entity data fields for tax and regulatory compliance.
2. Fundraising processes that did not align with their operational methodologies.
3. Limited reporting capabilities leading to manual data manipulation.
4. Inflexible data extraction impacting timely and accurate investor reporting.

Operating at a high-volume capacity with a substantial number of funds and investor accounts meant that these limitations significantly hampered SPI Advisory's efficiency and scalability.

### ...and The After

By embracing Dynamo Software, working specifically with the platform's CRM, Investor Portal, and Fundraising modules, SPI Advisory was able to reimagine their workflow:

#### Custom Fields & Reports

- Dynamo's ability to add custom fields streamlined data capture for current IRS requirements.
- Quick implementation of these fields across the Dynamo database and Investor Portal drastically minimized setup times.

#### Enhanced Fundraising Workflows

- Fundraising process revamp allowed for the collection of necessary data upfront.
- **Existing investors experienced a dramatic reduction in submission times, from 30 minutes to 2**, thanks to auto-populated Subscription Booklets.

#### Intelligent Distribution Process Management

- Dynamo automated rounding errors and provided accurate ACH instructions, **shortening the monthly distribution time from 1.5 weeks to just 2 days**.

#### Tax Preparation Efficiency

- Dynamo's customizable reports **cut down the 3 weeks spent manually adjusting raw tax data output to just 3 days**, ensuring more precise K-1 data delivery to CPAs.

## Four Key Outcomes

SPI Advisory leveraged Dynamo to achieve these meaningful outcomes:

### Time Savings

- ✓ Monthly distributions efficiency **improved from 18 weeks to 24 days annually.**
- ✓ Tax season K-1 data preparation effort **reduced from over 3 weeks to just 3 days.**
- ✓ Pulling together written consent signature packages dropped from **6 hours to 1.5 hours.**

### Fundraising Improvements

- ✓ Centralization of fundraising processes resulted in a **50% decrease in support inquiries.**
- ✓ Staff could be reallocated due to easier review and submission processes.
- ✓ Staff has the ability to absorb an approximate 50% increase in raise sizes without the need for additional personnel.

### Data Accuracy

- ✓ Guided web forms substantially **reduced investor submission errors from 60% to 10%.**

### Operational Flexibility

- ✓ According to Warder, *"For us, the value of Dynamo is the near infinite flexibility of the tool. We have made full use of that flexibility with the creation and inclusion of necessary data fields, customized views, tabs, workspaces, and workflows."*



*Dynamo has had a vast & nearly incalculable positive effect on our team's efficiency and quality of work life. We find new ways to utilize Dynamo every day. The gift of efficiency has allowed us to work on projects that grow our company rather than staying mired in mind numbing, critical workarounds. The effect has been so electric, we are about to expand Dynamo to assist us in areas beyond investor relationship management.*



## Success Unlocked

Through the strategic implementation of Dynamo's CRM, Investor Portal, and Fundraising modules, SPI Advisory has significantly enhanced its operational efficiency, improved its investor communications, and streamlined fundraising processes. Navigating a complex landscape of service providers, SPI chose to partner with Dynamo, therefore elevating their ability to handle high volumes of financial transactions and investor engagement with exceptional agility and precision. This sets the stage for SPI Advisory's continual growth and unparalleled success.

### About SPI Advisory

SPI Advisory is a Dallas-based private equity firm that has been a principal investor in over \$2.5 Billion of multifamily real estate, with \$1.3 Billion in current Assets Under Management. SPI is transforming the way high-net-worth investors identify, assess, secure, & sell high-yield, tax-efficient multifamily real estate investments. SPI offers tailored joint venture partnership and advisory services as well as passive investing opportunities in institutional-quality multifamily assets to our increasingly diverse client base. For more information, please visit [SPIAdvisory.com](https://SPIAdvisory.com).

### About Dynamo Software

Dynamo gives alternatives investors a Performance Edge, empowering them to efficiently scale their firm to capitalize on the growing wave of private market opportunities. With the **Dynamo Alternative Investment Platform**, Limited and General Partners can now run a tightly integrated firm, putting all their data to work to accelerate operations across front, middle, and back office, unleashing teams to work smarter, and allowing leaders to make better investment decisions and scale their firm. Dynamo has a global footprint with operations across North America, EMEA, APAC, and UAE. For more information, please visit [DynamoSoftware.com](https://DynamoSoftware.com).

- Founded in 1998
- 1,000+ global clients
- \$10T client AUM



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