



# SS&C Intralinks and HCI Equity Partners: Elevating Investor Communications

HCI Equity Partners is a lower middle-market private equity firm that partners with family- and founder-owned manufacturing, service and distribution companies. With extensive experience in both private equity investing and operational leadership, the professionals at HCI identify attractive opportunities in targeted sectors where their expertise and relationships can add value and accelerate revenue growth.

## Situation

In a highly competitive fundraising market, building limited partner (LP) general partner (GP) relationships around trust and transparency is more important than ever. However, delivering in-depth, on-demand fund reports can be a time- and resource- intensive process. With over 100 unique investors to report to across four investment funds, Amy Stremmel, chief financial officer at HCI Equity Partners, and her team have limited capacity for administrative tasks. Before partnering with SS&C Intralinks, Stremmel used the firm’s customer relationship management (CRM) platform as the primary point of contact for investor relations.

“When using our CRM platform, we had a lot of trouble trying to customize features to work in our world,” says Stremmel. “It was painful because their service team didn’t understand what we do.” Ultimately, Stremmel and her team were able to distribute financial reports, privacy notices and certain legal documents through the CRM’s mass

## Client Success Story

HCI Equity Partners

Industry:  
Private Equity



### Easy implementation

Dedicated CSM and upgrade specialist at every step



### Enhanced investor experience

LPs can easily view information across all funds and GPs



### Improved productivity

GPs can manage and permission users in one click



email function but were still sending individual capital call and distribution notices via email – which required significant preparation time and introduced unwanted data-security risk. To streamline HCI's workflows in connection with the firm's latest fundraise, Stremmel decided to look for a purpose-built fund reporting platform.

## Solution

Stremmel and team reached out to their peers for recommendations to identify a portal that would meet HCI's needs. Intralinks, widely recognized by LPs and GPs as the industry standard for its alternative-investments solutions, was an easy choice. After five years of using Fund Reporting™, Intralinks' then-current investor portal, Stremmel decided to upgrade to InvestorVision™, which further streamlined HCI's fund-reporting workflows. With InvestorVision, formerly multi-step processes like adding new users across multiple funds and issuing quarterly reports can be completed with just a few clicks.

"It's just one step," says Stremmel. "I can add a user, select the funds and documents to which they should be permissioned, and then it's done." She then uses the impersonation function to confirm users have the appropriate access settings by viewing exactly what they will see when logging in. Stremmel also issues distribution notices, K-1s and all other documents through InvestorVision. "We use InvestorVision most often to distribute financial reports, capital calls and distribution notices," she says. "We also have certain legal docs available through the portal so investors can access them easily. It works great."

## Results

The Intralinks upgrade team quickly got InvestorVision up and running for Stremmel and her team, breaking down the onboarding steps into a series of brief working meetings tailored to her schedule. "The upgrade from Fund Reporting to InvestorVision was seamless," she recalls. "Our customer success manager and data team specialist worked with me throughout the entire process and were always happy to hop on calls as needed to walk me through any new steps."

The process was equally smooth for HCI's investors, who were able to log in with their existing credentials and easily access fund data and documents. "Across more than 300 users, I didn't receive a single question from any of our LPs during the transition," explains Stremmel. "I sent out an email to all users a couple of days before the rollout to let them know what was happening, and then we launched – no issues, no questions."

## Benefits

With all fund data and documents at their fingertips, HCI's fund managers and LPs can now devote more time to high-value strategic tasks, rather than going back and forth over email or logging in and out of different platforms. "Investors likely prefer this portal because they can log in and easily see the most recent documents, instead of having to check on all their funds separately," says Stremmel. "Rarely do I get a request to resend a report or notice." She also looks forward to activating the customizable LP landing page, which highlights current firm events for investors, from annual meeting updates to recent press releases.

With features that enable seamless reporting, like single-step user permissioning, and a branded LP landing page, InvestorVision helps HCI stay connected with its LPs – and fits within the firm's budgetary limits. "The upgrade turned out not to be a significant cost increase given the added benefits we were getting. That made it a no-brainer for us," she says. Given InvestorVision's positive reception among the firm's fund managers and LPs, Stremmel will continue to use the solution across HCI's four existing funds and plans to use it for future funds as well. "In addition to being technically skilled, Intralinks understands the PE industry, the workflow, and how investors and funds are connected," she concludes. "We've had a great experience since day one."

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