with. Intelligence

A smarter way to use your CRM

August 2025

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Feeling underwhelmed by your CRM provider? You're not alone. Our annual CRM survey revealed that 45% of fund managers and allocators feel neutral or worse about their CRM.

We also asked which features matter most and how well their CRMs deliver on them.

But the problem may not lie solely with the technology, it could be how it's used. What practical guidance can be followed to get the most from our CRMs and make the system worth the investment?

Read on to explore:

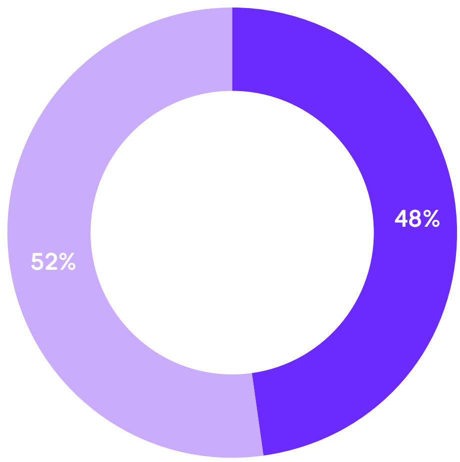
Bringing hidden CRM opportunities to light. Despite CRM's promises, many firms face frustration due to low integration rates with data providers and administrators, leading to missed opportunities.

Industry-specific CRMs: supporting business goals. CRMs tailored to asset management drive higher satisfaction because they offer relevant features out of the box.

Getting the CRM support you need. Support is the lowest-rated CRM feature, especially in general-purpose systems, highlighting the need for better vendor help and user training.

Making your CRM work for you. Frustration often stems from implementation, not technology, and firms can improve outcomes by investing in tailored setup, clean data, purposeful reporting, and strong support.

Figure 1
How satisfied are you with your CRM?



These statistics paint a picture of widespread CRM dissatisfaction across the asset management industry, leaving many professionals unsure whether this important tool is pulling its weight.

Request a demo

Bringing hidden CRM opportunities to light

For many, a CRM holds the promise of data transformation: a single source of truth, greater efficiency, and improved reporting. In practice, it often leads to frustration due to inefficient workflows, poor data quality, low usage, and lost opportunities.

Fund managers and allocators prioritized 'data accuracy and integration' in their CRM.

Yet, integration with data providers and fund administrators was limited, with only 20% of respondents reporting to integrate with either. Uptake was slightly higher among fund managers at 20%, compared to 10% of allocators.

Expanding integration

Outlook remains the most commonly integrated tool with CRMs. While synchronization with an email application is essential, it doesn't provide business intelligence that fund managers and allocators increasingly expect.

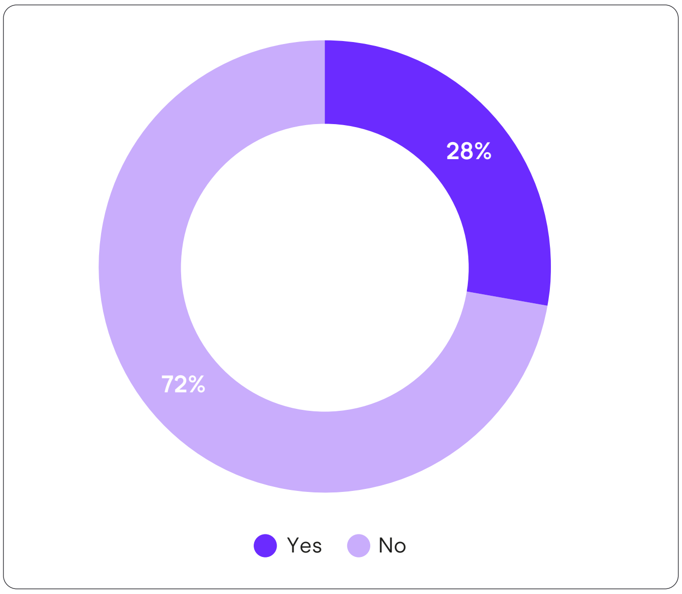
Despite its high importance to both groups, 'data accuracy and integration' received an average satisfaction rating of just 3.2 out of 5. That low score may reflect limited integration with administrators and data providers, as well as concerns around cost, as reflected in comments such as "every other feature seems to come with an additional cost" and "no ability to connect to fund admin."

Improving data accuracy

Maintaining accurate data requires both discipline and technology. Users must establish regular data hygiene routines. This involves reviewing contact accuracy, updating deal statuses, archiving inactive records, and ensuring categorizations align with current business objectives.

Figure 2

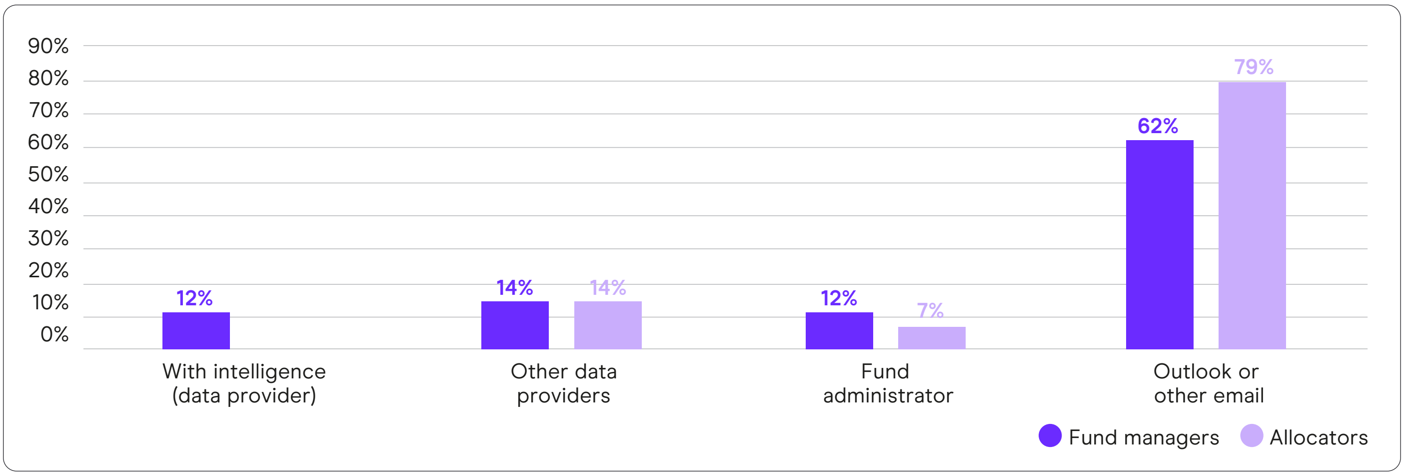
Is your CRM integrated with a data provider or fund administrator?



It's not glamorous work, but it underpins every valuable CRM function. **Without regular audits, even the best CRMs will degrade over time.**

Figure 3

What external systems or services do you currently integrate with your CRM?



Industry-specific CRMs: supporting business goals

Satisfaction increases to 61% among those using a CRM specifically designed for asset management.

That's no surprise. After 'data accuracy and integration', the next most valued features were 'usability and customization' and 'deal and workflow tracking'.

Interestingly, users of general-purpose CRMs were more likely to prioritize 'usability and customization'. This isn't a coincidence. Purpose-built systems work better because they align with familiar workflows and include relevant features out of the box.

Choosing a fit-for-purpose CRM can make a significant difference. Still, if switching isn't an option, the principles that make industry-specific systems successful can often be applied to general-purpose platforms. The key is understanding what you're trying to achieve and setting up your system accordingly.

Build reports that drive action

Reports should drive better inputs, not just summarize past activities. When reports answer specific questions, highlight pipeline gaps, flag neglected relationships, and surface missed opportunities, that, insight can be used to improve data entry practices and workflows.

Match your CRM to your process, not the other way around

Usability could improve dramatically if users understand both what their CRM is being used for and what capabilities they might not be leveraging. Too often, teams implement a system for one primary purpose (such as contact management) but fail to explore features that could achieve additional business objectives.

Figure 4

Usability and customization is the most important feature to me, and the CRM I use is:

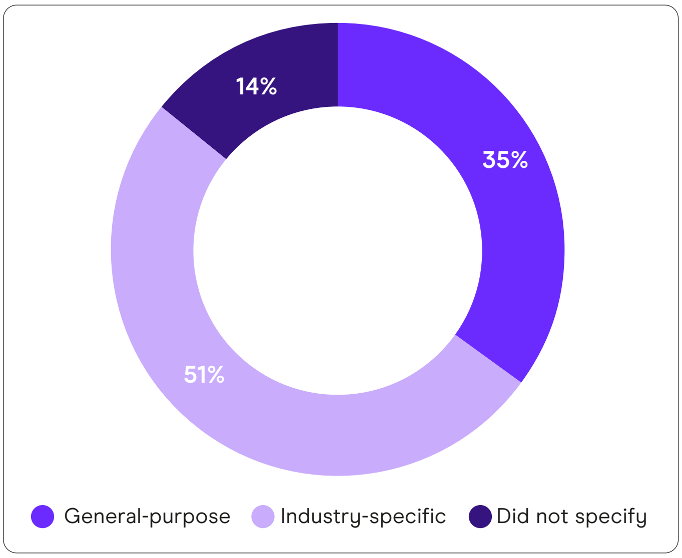
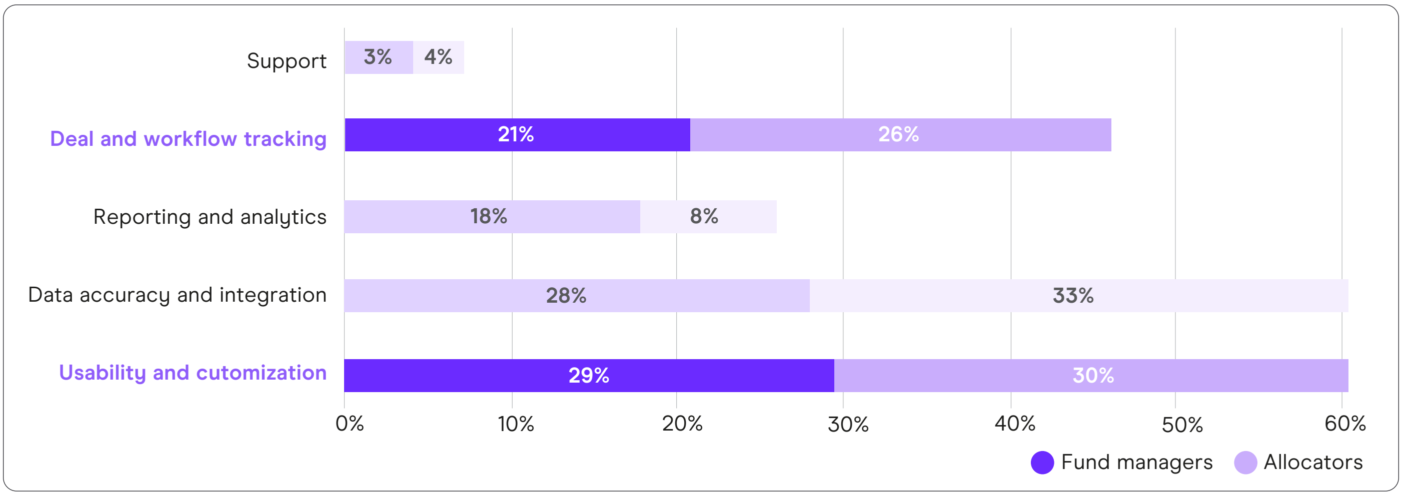


Figure 5

Please let us know the most important CRM feature to you



Getting the CRM support you need

Fund managers and allocators are, by far, most dissatisfied with the level and quality of support they receive from their CRM providers. Support received the lowest average rating across all features, just 2.7 out of 5.

There's a clear pattern: the less satisfied users are with their CRM overall, the lower they rate the support they receive.

So, where is support falling short? Once again, general-purpose CRMs lag behind their industry-specific counterparts.

Although the burden of better support falls largely on CRM vendors, there are proactive steps you can take. CRMs are far more effective when users are trained in relevant features and follow best practices.

Whether working with your provider or in-house teams, develop a training plan that includes hands-on sessions, detailed documentation, and ongoing support.

3.1/5

Industry-specific CRM
Average rating of 'support'

2.8/5

General-purpose CRM
Average rating of 'support'

Investing in comprehensive, role-specific training can help boost adoption, reduce frustration, and improve the long-term maintenance of your CRM.

Making your CRM work for you

Our survey highlights that CRM frustrations often stem not just from the technology itself, but from how it's implemented, integrated, and supported.

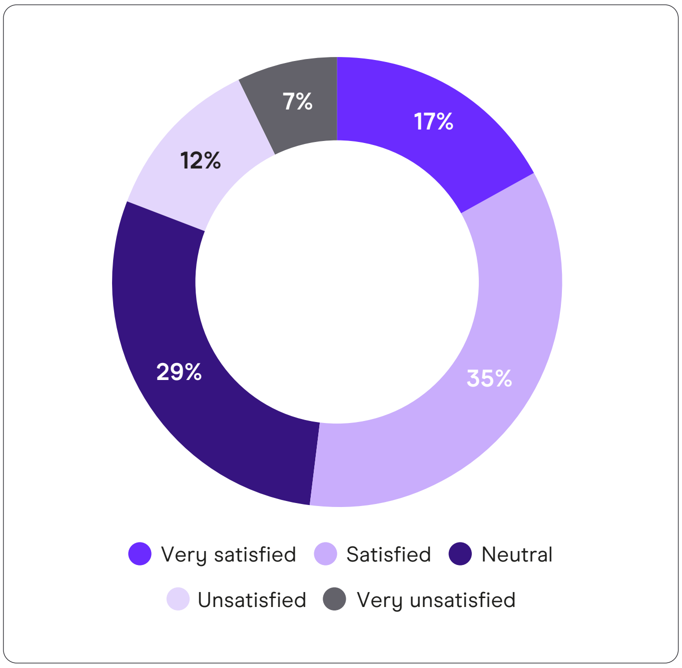
The gap between what fund managers and allocators need and what they get is most apparent when it comes to data accuracy, integration, and support. These three areas are critical to realizing the full value of a CRM. General-purpose systems may struggle here, but many of the same principles that make industry-specific CRMs successful, such as tailored workflows, thoughtful set-up, and strong training, can be applied more broadly.

Whether you're re-evaluating your platform or simply want to get more out of the one you have, you will need to invest in better processes, maintain cleaner data, ask more from your reports, and provide your teams with the support and training they need.

With a clearer understanding of your goals and a CRM aligned to meet them, it's possible to turn frustration into function and make your CRM a tool that genuinely works for your business.

Figure 6

How satisfied are you with your current CRM?



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Get the advantage in alternavtives

Access the data, insights and connections you need to fundraise faster and allocate smarter.

Our data solutions

We deliver a unique blend of data across asset class groups and global family offices, including profiles, fund information, performance metrics, people profiles and valuable perspectives from our analysts.

- Hedge Funds
- Private Credit
- Public Markets
- Infrastructure
- Private Equity
- Real Estate
- Family Offices

How we collect data

We collect our data through our industry experts, technology, and direct industry relationships. This gives you a complete view of the data – from past allocation decisions through to future intentions and preferences.

Industry leaders

Thanks to our deep industry relationships, we're able to collect insights directly from industry insiders which add context to publicly available documents.

Data scientists

Our data scientists analyze our extensive datasets built from both open-source information and proprietary data to identify trends in the industry before anyone else.

Reporters

Our reporters keep a close eye on industry developments, regulatory changes and macroeconomic shifts and provide you with the context you need to make informed decisions.

Researchers

Our researchers compile and analyze information to bring you the most up-to-date knowledge and help you benchmark fund performance, assess strategies and conduct due diligence.

Supporting strategic connections

Helping you find the right investors and managers for you

Make every interaction count

Relationship insights that drive retention:

Track the real value of every relationship from first meeting to full allocation.

Integrated capital raising support:

Pipeline views, tailored reporting, and preloaded templates, all designed for asset management professionals.

Smart workflows built for you:

Alerts, automated tasks, document sync, and scheduled exports, built-in.

Enterprise-ready and secure:

Compliance controls and data protection baked in from the start.

Saves time on the tasks that slow you down

Tailored workflows for capital raising with dynamic contact tracking, out of the box.

YOUR WORKFLOW	HOW WE STREAMLINE THE PROCESS
Manage allocator, consultant, and platform relationships	Keep all contacts, notes, and activity in one place so everyone's aligned.
Fundraise and track investor interest	See who's allocating, track engagement, and follow up faster with exclusive intel.
Host investor meetings across time zones	Auto-schedule, prep with live data, and log meetings in real time.
Stay on top of compliance and audit trails	All activity automatically tracked: emails, meetings, documents.
Manage tasks and team follow-ups	Assign tasks, set alerts, and automate reports to keep everything moving.
Documents	Securely store and manage all your documents in one place for ease and compliance.
Integration with Outlook	Link your CRM to the tools you already use for seamless tracking of all updates and communications.

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