Bite Stream Insider

How fundraising software helps firms tackle scale and complexity

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In this fundraising deep dive, we explore how innovative new software can help private capital managers streamline investor management, automate compliance, and enhance operational efficiency. For investor relations professionals navigating increasing complexity, this technology can be a powerful tool to manage scale and improve processes across the board.

Fundraising in 2025: Significant hurdles to overcome

In a complex, competitive, and uncertain fundraising environment, firms must be prepared. From managing vast amounts of data to working with fragmented and inefficient platforms, we'll explore the multitude of challenges facing both small and large firms in today's fundraising market and shine a light on the ingenious solutions already transforming the private markets fundraising scene.

Managing investor relationships: Your most important asset

The exponential growth of the private markets has unlocked enormous opportunities over the last decade for investment firms of all sizes and geographies. While this has led to increased capital flow into private markets and alternatives, it has also dramatically increased complexity in the fundraising process for some of the biggest (and smallest) players. With so many new entrants in the market, how can firms capture, centralize, and effectively use the data that matters most?

Centralizing investor data for transparency & efficiency

While many firms are beginning to embrace smart technology to enhance operations, others are still navigating a landscape shaped by legacy systems or multiple tech stacks (platforms) and solutions throughout the fundraising process. These setups, while familiar, lead to inefficiencies, data silos and fragmented communication, particularly as demands on investor relations teams continue to grow.

On the other hand, smaller firms are chasing precious capital often earmarked for larger players.[1] It's understandable they're stuck between seeking to scale their networks to reach new investors but not wanting to sacrifice the quality of communication with their existing investors. For many, it's simply too much of a risk to expand the headcount of their internal investor relations (IR) team before even considering the regulatory hurdles which even the biggest of IR teams struggle to overcome.

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In both cases, innovative purpose-built fundraising software can facilitate the teams to achieve their goals. The right technology can provide an end-to-end, automated solution to optimize fundraising operations and improve investor relations, serving as a single source of truth. Tangible examples can include helping firms manage the overwhelming complexity of regulation when onboarding new investors, saving huge costs by automating significant elements of fund admin and diversifying investor bases by using smart technology to reach new pools of relevant LPs.

Ultimately, software should be designed to streamline these specific challenges in the fundraising process - to allow firms to raise capital in a quicker and more efficient way than before – but with the flexibility to scale when required.

Automating investor engagement & communications

Automation is a key component of any efficient fundraising software aimed at streamlining investor interactions. This can be pre and post investment, and can include sending personalized updates, performance reports, and capital calls.

The latest digital tools should be geared towards improving efficiency and include features such as AI-assisted form completion, e-signatures, and secure document sharing. Investors should now experience a seamless, branded and intuitive experience – all cleverly designed to encouraging reinvestment. At our platform, Bite Stream, you'll find these features within our fundraising portal, accessible to both fund managers and investors via a single login.

[1]Pitchbook, PE fundraising expected to slow after period of sustained growth, January 2025

Reporting and compliance: Streamlining data & transparency

Portfolio monitoring & fund performance tracking

In a world of instantaneous data, real-time insights into financial performance, ESG metrics, and key portfolio indicators (KPIs) can transform decision-making. Automated dashboards are now providing instant visibility into vital information such as fund performance, investor behavior and risk assessment. Digesting vast amounts of data will enable firms to comprehend complex information, making quick (and more informed) decisions while reducing the reliance on manual processes.

This is precisely why we were delighted to merge with Untap, an AI-powered portfolio management and reporting solution. This partnership created the next evolution of our platform, Bite Stream+, combining Untap's advanced portfolio monitoring and reporting alongside Bite Stream's investor relations and compliance tools, offering fund managers a single source of truth and making data-driven decision-making easier than ever.

Ensuring compliance across global standards

For all investment firms operating across the globe, staying compliant has become a big talking point. A divergent global regulatory landscape has seen many firms scrambling to adapt to regional regulatory requirements while managing increasing global investor bases.[2] There's no doubt; managing diverging regulatory requirements across jurisdictions is a complex task and significant challenge for firms of any size.

Thankfully, smart, integrated compliance tools help firms adapt to evolving global regulations. Features like secure document storage and automated regulatory checks minimize compliance risks, while structured ESG reporting will meet investor expectations.

Tech integrations: Ensuring scalability & operational efficiency

Reducing administrative burdens

Previously, much of the fundraising and investor relations function relied on manual, time consuming processes undertaken by extensive teams of IR professionals. Indeed, research from InterSystems found 66% of asset managers require between six to nine members of staff to just process data requests![3]

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[2] Deloitte, Global regulatory landscape, January 2025

[3] Fundstech, Asset managers still dogged by data errors and manual processes, July 2024

This should no longer be the case. Now, with the aid of new digital platforms, these workflows have been significantly streamlined to vastly improve internal efficiency, dramatically reducing overhead costs as a result. This means firms can focus on the tasks which matter most without worrying about scaling their team to manage the huge amounts of investor data.

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Furthermore, The Drawdown's Fund Admin Report 2024 found that despite the fundraising slowdown, there is a huge opportunity for tech-enabled providers to help firms enhance operations and tackle data with smart technology solutions.[4]

Seamless integration with existing tech stacks

As firms scale, they often rely on a complex ecosystem of CRM systems, AML providers, and fund management tools to manage operations and ensure regulatory compliance. Integrating these systems eliminates data silos, improves workflow consistency, and ensures that firms operate with a single source of truth for investor information. This will be the key for firms to achieve sustainable growth in the years to come.

Unfortunately, many firms are still wasting precious time working with outdated, cumbersome systems. Emphasizing this point, a recent survey discovered 70% of professionals are spending over 20 hours each week managing 'fragmented systems' leading to significant losses in productivity and, as a wider implication, slower fundraising processes.[5]

Future-proofing digital infrastructure

Building the right digital infrastructure is a journey. Firms shouldn't have to constantly switch systems as they scale – the software should scale with the firm. We're proud our Bite Stream is designed to grow with investment firms, adapting to the latest digital tools on the market, capturing any new sources of data and, crucially, swiftly adapting to a constantly changing regulatory environment.

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[4] The Drawdown, Fund Admin Report 2024, June 2024

[5] Quickbase, Report: 70 Percent of Workers Lose 20 Hours a Week to Fragmented Systems, June 2023

Key takeaways for how fundraising software can help your firm tackle scale and complexity

The result: Better data, strategy, growth

In today's market, real-time analytics and automated processes can help firms to significantly redefine fundraising strategies and enhance engagement with both current and prospective investors. New digital investor management tools provide visibility on key targets and capital sources, helping firms stay on track and maintain strong relationships.

However, choosing the right platform is crucial. It should be one that's custom-made, serving the firm's current purposes but also flexible to ensure scalability in the long term. This will allow firms to grow without changing the platform which can create productivity bottlenecks and negatively impact investor confidence.

Why choose Bite Stream to help tackle scale and complexity?

We believe Bite Stream is the perfect tool for investments firms, small and large, to tackle the multitude of challenges they face in today's fundraising market.

Our software has been designed to streamline fundraising operations, enhance investor relations, accelerate distribution, and act as a single source of truth for private capital professionals. Benefits of using Bite Stream include end-to-end automation, scalable multi-jurisdictional and wealth management distribution capabilities, and a proven track record of helping firms navigate regulatory complexity with ease while expanding their investor base across borders.

Get in touch and schedule a demo to learn more about Bite Stream's features and find a solution that suits your needs.

Schedule a demo

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