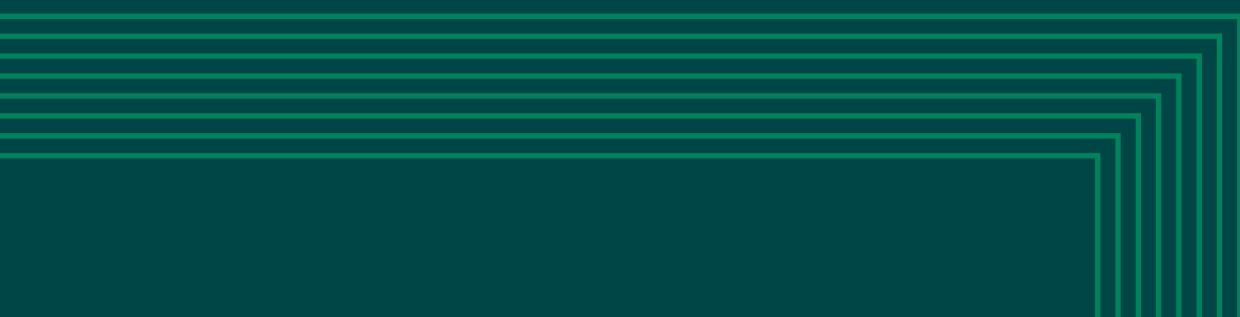


Juniper Square

How Silos Spoil Fundraising Efforts

Why breaking down technological and team barriers with a single unified platform can strengthen investor relationships and accelerate fundraising.



Key takeaways

1

Capital raising has become more challenging, yet many private markets IR professionals rely on fragmented and outdated systems to maintain client relationships and fundraise with new prospects.

2

Without connected systems, IR teams waste time and money creating workarounds to navigate disconnected data and waiting for the insights they need to do their job—leading to inaccurate and incomplete information, undocumented client interactions, and jeopardized investor relationships.

3

By breaking down silos, a unified platform can empower IR professionals to devote more time and resources to focus on what matters: building deeper client relationships and cultivating new business opportunities.



Does this scenario sound familiar?

A managing partner has been in a conference room all day meeting with current clients and pitching prospective LPs. As the IR professional walks into the room after the meetings finally end, they see a table strewn with pitch decks, notes, and numbers scribbled into the margins.

When they sit down for a debrief, the partner announces he has a flight to catch and races out of the room. They end up riding the elevator down to the lobby with the partner, frantically taking notes to figure out what happened in the meeting and what needs to happen next.

Over the next four hours, the IR professional:

- Manually inputs as much information as they can decipher into their **CRM**.
- Sends **text messages** to their teammates identifying urgent follow-up materials to send each client and prospect.
- Uses **Outlook** to set up a meeting with their data and analytics team to address a prospect's portfolio analysis request.
- Sends a **Teams** message to their finance and accounting team to let them know that one client has questions about the calculation of their performance fee and another needs assistance with an upcoming audit.

The IR professional has used four separate systems to communicate what they *think* are the appropriate next steps, and they're still not sure they've captured everything from the meetings.

Jay Farber

Juniper Square's General Manager points out why barriers hinder HR:

“

IR professionals are duct-taping workflows, logging calls manually, and chasing updates that should be automatic. You're not scaling. You're surviving.

The high costs of operational silos

The scenario may seem extreme, but it's a daily reality for many IR professionals. The reason? Many parts of the job that require connected teams and technologies are conducted in silos.

Instead of a connected system built around a single source of truth for LP relationships and fund data, IR professionals are stuck creating manual workarounds that suck up time and cost real dollars.

And though silos have broad effects on productivity and morale, many GPs don't even realize they work in silos. The first step is identifying where silos have organically formed in their organization.

Jason Ment

StepStone Group's President & Co-COO shares how operational silos can negatively affect performance¹:

“

Over time, silos create a hidden drag on performance with costs showing up as bloated budgets, inconsistent reporting, and manual workarounds that slow decision-making and distract teams from higher-value activities.

A closer look at four potential silos

Below are examples of typical silos found in many GP firms:



IR vs. fund admin silo

The “I'll grab it myself” problem



Intra-IR silo

The “Don't worry, I've got it all up here” problem



Partner-IR silo

The “Doug” problem



External-internal silo

The “where did I see that data again?” problem



IR vs. fund admin silo

The “I’ll grab it myself” problem

When IR and finance teams work in silos with disconnected data, IR professionals often rely on outdated or incomplete information, **risking inaccurate communication with LPs.**

- IR teams struggle to access real-time fund data.
- Workarounds lead to reliance on outdated reports or spreadsheets.
- LPs receive incomplete or incorrect information.
- Disconnected systems hinder effective client communication.



Intra-IR silo

The “Don’t worry, I’ve got it all up here” problem

When client relationship knowledge resides in individual IR professionals’ heads rather than a shared system, it **creates gaps that risk inconsistent investor experiences and missed opportunities.**

- Key relationship history isn’t documented centrally.
- Team handoffs or absences create knowledge gaps.
- Inconsistent experiences jeopardize investor trust.
- Lack of a shared system hinders retention and cross-sell opportunities.



Partner-IR silo

The “Doug” problem

When key partner interactions with investors aren’t logged systematically, IR teams **lack the context needed to follow up effectively**, risking missed opportunities.

- Informal touchpoints often go undocumented.
- Key leaders don’t have time to log interactions in a CRM.
- IR teams struggle to piece together the whole story.
- Limited context hinders effective follow-ups and relationship building.



External-internal silo

The “where did I see that data again?” problem

When internal data and external research aren’t centralized, IR teams face **delays in delivering sharp insights to investors.**

- Internal and third-party data are often disconnected.
- Manually combining data slows insight delivery.
- Crucial industry trends and analysis can be hard to track.
- Technology barriers compound private markets data challenges.

The bottom line is that silos aren’t just operational inefficiencies; they’re fundraising friction points. The lack of a single source of truth that is accurate, easy to use, and scalable only amplifies those friction points, making it harder for IR professionals to do their job.

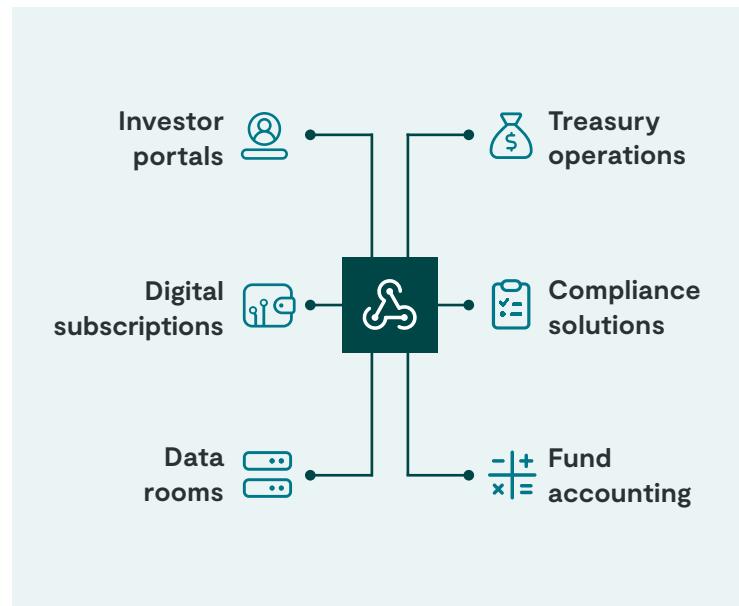
Breaking down silos with connected infrastructure

Silos don't have to be a way of life. But transitioning from silos to connected workflows requires a new approach that encompasses a commitment to technology strategy, structure, and culture.

Connected fundraising software and data

Replacing point solution software and fragmented data with a single platform that connects fundraising software and fund data can reduce costs and friction. A CRM designed for investor relations, for instance, allows firms to capture conversation context, automatically assign follow-ups, and allow for large-scale personalized LP communications.

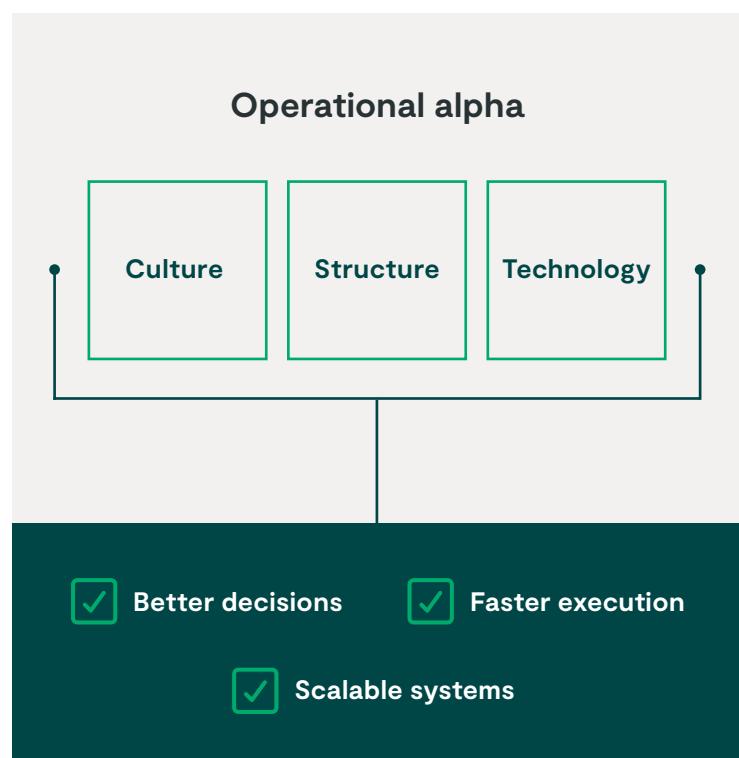
While powerful on its own, it's even better when connected to a fund's system of record and other applications used for fundraising and onboarding workflows, including data rooms, investor portals, digital subscriptions, and more.



A focus on operational alpha can unlock more capital

Operational alpha is the compounding effect of better decisions, faster execution, and scalable operational infrastructure built through investments in culture, structure, and technology.

Fundraising doesn't have to be hamstrung by silos—unifying around a single source of truth unlocks the speed, precision, and scale needed to thrive. Firms that connect data, teams, and technology position themselves to move with precision and the agility necessary to win when fundraising is especially competitive.



What does breaking down silos mean for the harried IR professional?

Let's return to the scenario imagined in the beginning. If the firm had implemented a connected platform, the situation could have played out much differently.

Instead of scribbled notes on paper, the managing partner could **use a voice app to recap meetings**, which are automatically sent to the IR professional and logged into the CRM.

AI functionality within the CRM could then **analyze the content to create automated next steps** and sync with Outlook and Teams to draft messages to professionals across the organization.

The IR professional can rely on intelligent insights to **indentify which prospects might be a good fit** for a new fund and start setting up meetings.

When a firm commits to breaking down silos, the IR professional can spend more time and resources focused on what really moves the needle: maintaining strong current relationships and building a path for future clients to come on board.

Take the next step

By transforming legacy, paper-heavy workflows into a connected digital infrastructure, IR professionals can scale LP relationships, fundraise faster, and win lasting investor trust. In addition, firms that leverage operational alpha can build scale for the future and help prepare for the complexities of retail investors becoming key sources of capital.

Get in touch today

GPs can talk to Juniper Square to jump start their fundraising with a connected platform built with IR professionals in mind.

[Learn more](#)