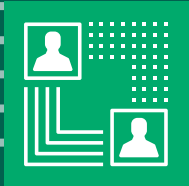
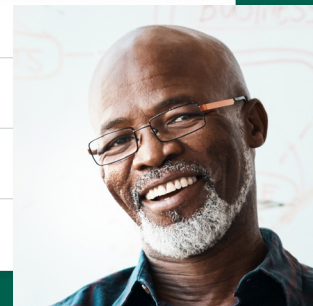


Partnership Enablement Scorecard

Is your organization on the right path to Partnership Enablement?



Name/Entity Type	Likelihood	Expected
Gary Simpson BFI Public Workers Pension Fund	80%	\$250,000
Alice McDonald Houston Teacher's Retirement System		
Stanley Fox Colleges of Los Angeles Endowment Investments		



To respond to changes in private markets, maximize outcomes for investors, and accelerate fundraising, you need a universal system that enables investment partners to connect and communicate seamlessly across every interaction. With this approach—known as Partnership Enablement—you can unlock the full potential of your partnerships.

For Partnership Enablement to be truly effective, five key principles are necessary. Use this scorecard to evaluate whether you're on the right path to taking a more modern approach to partnerships.

Refer to the **Partnership Enablement white paper** for more details on how you can scale operations and deliver better investor outcomes.

Get white paper →



Five principles of effective Partnership Enablement

Please use the boxes below to score your firm in each category.
Use 1 for strongly disagree and 5 for strongly agree.

SHARED

Enable better connection and communication with LPs through a shared view into partnership information.

We have a comprehensive portal solution for limited partners.

Our portal provides an extensive interactive dashboard, not just a static document repository.

Our portal provides the answers to most of the standard questions LPs typically have pertaining to their investments.

Investors can easily update their account information, such as investment preferences and payment details.

SCALABLE

Align around a seamless, integrated technology platform to create efficiencies and manage all aspects of the investor partnership in a single system.

We can segment and target investors for fundraising based on past commitments and returns.

Our team can instantly access partnership information about investor contracts, accounts, and investments across our business.

CRM and portal data is synchronized, so our teams can access correct information and communicate more efficiently with each other and our investors.

Our portal digitally enables the investor onboarding experience.

SEAMLESS

Unite expert practitioners with innovative workflows to deliver modern administration solutions.

Our administrator and accounting team can flow capital transactions and payment details into our portal, giving investors an up-to-date view of capital balances and position-level details.

Our administrator and accounting team synchronize fund information with our CRM systems, ensuring everyone is on the same page.

Our administrator and accounting team provide visibility into investment and asset-level returns, enabling internal fundraising and investor relations teams to collaborate and stay on the same page.

We can export structured investment and asset data for offline analysis.

SUPPORTED

Elevate vendor expectations for customer service and success at every stage of the partnership.

We can securely share partnership information with the right level of visibility between investors and third parties (e.g., consultants, lawyers, auditors).

Our vendor helps structure and manage partnership data.

Our vendor helps augment partnership information on an ongoing basis.

Our vendor regularly provides expert guidance and best practices.

SECURE

Adhere to enterprise-grade infrastructure and security practices for managing and sharing sensitive information.

Our vendor maintains security accreditations, such as SOC 1 and SOC 2.

Partnership data is encrypted using bank-grade encryption.

Third-party security audits are routinely performed on our vendor's administration platform.

Our vendor complies with data privacy frameworks (e.g., GDPR, CCPA).

Partnership Enablement Scorecard

Please add your score and type your total here: _____

0

25

50

75

100+

Score of 0-25

You're just beginning your Partnership Enablement journey. Start by gathering resources and [learning from GPs](#) who have successfully reimaged the investor experience, created operational scale, and delivered more transparent and trusted administration outcomes.

Score of 26-50

You're on your way to effective Partnership Enablement. You're making progress, but you need a strategy for Partnership Enablement to help you accelerate fundraising, scale operations, and realize outsized growth.

Score of 51-75

Your firm has a great foundation to drive effective Partnership Enablement. However, you may have noticed areas for improvement. Create a tiger team and an action plan to address development areas to scale, raise more capital, and better serve investors.

Score of 76 or more

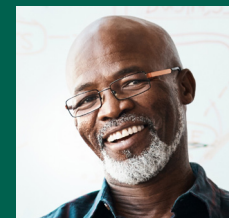
You're already an effective partner with a solid operating plan. Review and refresh your assessment annually and stay up to date on the latest industry developments to continue building thriving partnerships, identify exceptional investment opportunities, and outpace investor expectations.

Regardless of where you are on your journey to Partnership Enablement, Juniper Square is here to help you accelerate fundraising, build thriving partnerships, and scale operations effectively.

Take the next steps

Schedule a meeting with one of our industry experts to learn how you can get to the next level.

Let's chat →



About Juniper Square

Juniper Square is the leader in Partnership Enablement for the private funds industry, offering a universal system for GPs and their LPs to seamlessly connect and communicate across every stage of their partnerships. Juniper Square empowers investment managers to accelerate fundraising, scale operations efficiently, and improve investor satisfaction.



1,800+
GPs



500,000+
Investor accounts



32,000+
investments managed



\$700B
in investor equity



Learn how Juniper Square can help your firm build stronger investor relationships.

Contact us today at:
junipersquare.com/learn-more

