Secure Data Exchange (SDX)

SATUIT TECHNOLOGIES

In the investment and asset management sector, seamless application integration is necessary to maintain and improve client relationships, drive efficiencies, and make informed decisions.

Firms that are ahead of the curve consistently align the CRM as their data hub, while creating more automated integration "spokes" to the rest of their application ecosystem. Satuit's SDX allows a typical business user to create custom import and export templates, as well as schedule critical imports and exports, with a no-code, wizard-like interface.

This white paper gives an in-depth overview of Satuit's Secure Data Exchange (SDX) options with real-world examples, demonstrating how it can greatly enhance your firm's operations and drive superior outcomes.

About SatuitSDX

Achieving Efficiency, Competitive Advantage, & Lower Costs Through CRM Integrations

SatuitSDX (Secure Data Exchange) is a powerful toolkit within SatuitCRMthat offers tools for end-users, business analysts, and application developers to import and export key data from SatuitCRM. Many clients use SatuitSDX to integrate back and middle office software, creating a unified view of investor relationships, streamlining workflows, and improving decision-making.

Satuit Clients Benefit From:

◆ **ENHANCED DATA MANAGEMENT**

Avoid duplicate records and ensure data consistency. Updates in the CRM are reflected across all integrated applications.

◆ **GREATER EFFICIENCIES**

Automate routine tasks, speed up processing times, and simplify data retrieval with a scalable platform that supports business growth.

◆ **TRANSPARENCY**

Improve reporting and gain a comprehensive view of client relationships, breaking down data silos for better communication and collaboration.

◆ **ROI**

Reduce operating costs by saving time on data management and reducing the need for third-party software. Identify and address process gaps to enhance profitability.

Current Technology Integration Trends

Current trends in the investment and asset management sector emphasize the growing importance of integration between disparate software systems, as illustrated below by the following statistics:

NOTABLY, 59% OF ORGANIZATIONS REPORT THAT INTEGRATIONS ENHANCE THEIR CLOSE RATES.

DATA-DRIVEN BUSINESSES ARE 23 TIMES MORE LIKELY TO ACQUIRE NEW CUSTOMERS, 6 TIMES MORE LIKELY TO RETAIN THEM, AND 19 TIMES MORE LIKELY TO DRIVE PROFITS.

DATA INTEGRATION TOOLS ARE DEEMED "FOUNDATIONAL INVESTMENTS" FOR BUSINESSES. FURTHERMORE, BY 2026, MANUAL DATA INTEGRATION TASKS ARE EXPECTED TO DECREASE BY UP TO 30%.

Integration Methods

Satuit supports a variety of integration methods to ensure seamless connectivity and data flow across your business systems. Whether you have in-house development resources or require user-friendly tools, Satuit has flexible solutions designed to meet your specific needs, including:

SatuitSDX Utility

With a simple UI built on top of the REST API, the SDX utility requires only moderate technical skills, leveraging CSV files and user-friendly import mappings with pre-built exception-handling benefits. Additionally, the SatuitSDX Utility provides a graphical user interface (GUI) that allows users to automate and schedule data imports or exports from Saved Views or MS Report Builder Reports. This is particularly useful for firms without dedicated development resources, large data set jobs (using the Bulk REST API), and those lacking MS.net or coding skills.

Import Tools

Satuit's proprietary import tools cater to moderately tech-savvy users, enabling them to import CSV file data into any primary data table through reusable field mappings and basic translation tools. These tools are perfect for monthly investment data updates. Satuit's import tools allow you to add contact lists from new employees or conferences, consolidate data from multiple systems, and perform essential data maintenance.

Pre-built Integrations

Satuit offers pre-built integration solutions for many popular third-party tools in the investment space, requiring minimal effort for common integrations. These integrations assist users in performing day-to-day tasks efficiently. Third-party tools and integrations include in-app plugins, integration links, data import tools, productivity tools, and e-marketing tools.

API

Satuit offers multiple API tools tailored for both developers and business analysts. Developers can utilize an open REST API to access all primary data tables within the application, enabling real-time systems integration.

Microsoft SSIS

For businesses requiring more complex Extract, Transform, Load (ETL) functionality, Satuit can build and manage integrations using Microsoft SQL Server Integration Services (SSIS). This platform supports two-way file exchanges with other data stores, transferring files via SecureFTP sites. It's an ideal solution for data-intensive updates that require data transformation between the source database and the CRM or portal.

Integration & Embedded Links

Integration links in Satuit enable data to be passed as part of a URL to another website, opening that URL in a new window. These customizable URLs can pass a contact's address information to Google Maps, open client-specific folders on SharePoint, or link to third-party data services using unique IDs. Embedded links provide a way to pass information from Satuit to a URL, displaying the website within the application rather than in a new browser window. Use embedded links to embed widgets, display information from web-based data stores, and access SharePoint sites.

Integration Use Cases

Reducing data silos and ensuring faster, more organized communication between systems is crucial for firms. Integrating these systems mitigates data integrity issues, enhances staff efficiency, and fosters transparency across the organization. Satuit offers clients two-way integrations with other data sources via import tools, the API, or SSIS tools.

A Boutique Institutional Asset Management Firm

Leveraging Import Tools for Increased Data Accessibility

An asset manager at a boutique firm wanted to share investment information via Satuit's SIP portal, making it more accessible to investors. By leveraging Import Tools monthly, the client could import audited data such as historical market values, top holdings per account, and monthly performance information from their Portfolio Account System (PAS) into Satuit. This information was then available in graphical and tabular formats. Consequently, the firm reduced the number of read-only licenses for the PAS, as the data was readily accessible to the sales and client services teams in Satuit.

Mid-Sized Multi-Asset Class Management Firm

Using SDX Utility in Satuit Nightly for Improved Data Integrity & Fewer Data Silos

This client uses Satuit SDX for nightly updates, utilizing the SDX Utility to maintain data integrity and reduce silos. Serving fund distribution, wealth, and institutional clients, they schedule data import and export jobs using SDX to import investment data (Market Values, Holdings, Transactions, Performance) from their PAS into Satuit and export contact and sales data from Satuit into their PAS. The imported data is also displayed on their SatuitSIP Investor Portal.

Mid-sized Institutional Asset & Funds Distribution Management Firm

Consolidating Information into a Centralized Data Warehouse

This firm uses APIs for bi-directional integration with a data warehouse, consolidating information into a centralized system. Nightly, sales, activity, and contact data are pulled from the CRM, while investment data is imported into the CRM using the Bulk API. This integration allows CRM users to access investment-related data crucial for relationship management and provides BI Tools with a single source for executive reporting.

Multiple Asset Managers of Various Sizes

Streamlining Prospecting Initiatives Through an Integration with Dakota Marketplace Data

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A Mid-Sized Funds Distribution & Institutional Asset Manager

Measuring Sales & Marketing Effectiveness with Satuit Nightly

This firm needed to measure the effectiveness of its sales and marketing efforts. Satuit created a customized Extract, Transform, Load (ETL) job to import investment information, contact details, and fund sales data into Satuit nightly. This integration allowed the firm to view investment data alongside client/broker interactions, allowing them to measure sales and marketing effectiveness accurately.

Mid-Sized Institutional Asset Management Firm

Reducing Duplicate Data Entry via Two-Way Integration

An institutional asset manager sought to reduce double-entry between their CRM and billing software. Using Satuit's APIs, the client established a nightly, two-way integration to pass investor contact details, account details, and billing information between the CRM and billing system. This integration saved time on data entry and provided relationship managers easy access to investor billing information within the CRM, which could be shared on their SatuitSIP portal.

Large Scale Multi-Class Asset Manager

Achieving Centralized Management of Contact & Reporting Data

This asset manager integrated their marketing automation software with their CRM to improve data integrity, operational efficiency, sales transparency, and lead response times. Satuit's pre-built module enabled the asset manager to send mailing lists from the CRM to the marketing software and return mailing details, interaction statistics, and lead scores. This consolidation improved data quality, reduced response times for new leads, and provided detailed feedback on marketing campaigns.

Mid-to-Large Sized Institutional Asset Manager

Improving Data Integrity, Operational Efficiency & Sales Transparency

A manager at a mid-to-large-sized institution needed to manage contact and reporting data centrally and share it on their portal. They used Satuit's APIs to send contact and reporting requirement details from the CRM to the Client Reporting tools. Once generated and approved, client reports were bulk uploaded back into Satuit, autormwatically associated with the correct contacts and shared on the SatuitSIP investor portal. This integration reduced the time taken to produce reports, minimized human error, and provided greater transparency in month-end reporting processes.

Driving Superior Outcomes & Greater Efficiency with Satuit's Integration Options

Satuit's robust integration capabilities enable asset management firms of all sizes to drive operational efficiency, data accuracy, and client engagement. By leveraging powerful tools such as import utilities, APIs, and SSIS integrations, firms can reduce redundancy, improve access to vital information, and achieve strategic goals.

The success stories illustrated demonstrate that with the right technology, organizations can foster a culture of insight-driven decision-making and seamless communication, ultimately positioning themselves for sustained growth in the asset management sector.