

CASE STUDY

# Building a Salesforce foundation for investor outreach, conference engagement and deal flow visibility

Cloud Genii helped Altree Capital structure Sales Cloud around investor relationships, conference engagement, fundraising coordination, follow-up activity and deal flow visibility.

TL;DR

Cloud Genii helped Altree Capital move investor outreach, conference activity, follow-up tasks and deal-flow visibility into a structured Salesforce operating model.

The work connected investor relationships, campaigns, conference activity, tasks, meetings, opportunities, email and reporting into a more coherent Sales Cloud foundation.

The implementation created clearer follow-up discipline by using Salesforce automation to create tasks from Lead and Opportunity follow-up statuses.

Overall, Altree gained a stronger operating base for investor relationship management, fundraising coordination and future reporting.

<b>Client:</b>	Altree Capital
<b>Industry:</b>	Financial services / Impact Investment / Fund Management
<b>Service:</b>	Greenfield Salesforce Implementation
<b>Platform:</b>	Sales Cloud

<b>Sales Cloud foundation</b> Structured around investor relationships, outreach and deal flow.	<b>Conference visibility</b> Conference, Campaign, Campaign Members, Tasks and Events connected.
<b>Follow-up discipline</b> Automated tasks created from Lead and Opportunity follow-up statuses.	<b>Reporting readiness</b> Reports and dashboards prepared around the new CRM structure.

## The situation

Altree Capital needed a more structured way to manage investor relationships, outreach, fundraising tasks, deal flow, email activity, reporting and oversight visibility.

Their investor process included prospect identification, outreach, interest assessment, due diligence, follow-up reminders, referrals to team members, and tracking key data such as investor details, communication history, interest level and status progression.

Before the implementation, much of the operating model depended on disconnected tools and manual follow-up discipline, mainly Excel and Outlook. The deeper issue was that investor outreach, conference

activity, relationship history and follow-up actions were not held together in one Salesforce operating structure.

### What was getting in the way

- Investor and deal activity were not structured around a single CRM model.
- Outreach and conference activity needed clearer tracking across conferences, campaigns, attendees, tasks, events, leads, contacts and follow-up activity.
- Follow-ups depended too heavily on manual discipline.
- Email and calendar activity sat outside the CRM workflow.
- Reporting depended on consistent data capture and correctly designed record relationships.

### What Cloud Genii changed

Implemented a Sales Cloud foundation around Altree’s investor and deal processes. Cloud Genii configured Sales Cloud around Leads, Accounts, Contacts, Opportunities, Campaigns, Campaign Members, users, profiles, automation, validation, reports, dashboards and Outlook / Exchange integration.

Mapped investor outreach and conference activity into Salesforce Campaigns. Campaigns and Campaign Members were used to track who was targeted, who was contacted, who responded, and how outreach activity related to broader fundraising and conference engagement.

Created a custom Conference structure to connect conference activity. The custom Conference object brought the conference record, associated Campaign, Tasks, Events and Campaign participation tracking together in one place.

Built automation to reduce manual admin and protect data relationships. Salesforce automations were configured for creating Conferences, Campaigns and Events together, creating follow-up tasks from Lead and Opportunity follow-up statuses, linking Campaign Members back to Conferences, updating last email sent dates, and grouping recurring conferences across different years.

Connected follow-up behaviour to operational process. Follow-up automation created tasks based on specific timeframes such as follow up now, in 3 months, in 6 months or in 12 months, making long-cycle investor engagement easier to manage.

Configured email and calendar integration guidance around Einstein Activity Capture and Outlook. The project included Microsoft Outlook / Exchange integration, with supporting guidance explaining how emails, events and contacts sync between Salesforce and connected Microsoft accounts.

### Salesforce capabilities involved

Salesforce Sales Cloud	Leads	Accounts
Contacts	Opportunities	Opportunity Contact Roles
Campaigns	Campaign Members	Tasks and Events
Custom Conference object	Salesforce Flow	Validation Rules
Reports and Dashboards	Campaign Influence	Microsoft Outlook / Exchange integration
Einstein Activity Capture Standard	User access and permissions	Data quality controls

## What changed

- A usable Sales Cloud foundation for investor relationship management, outreach, fundraising coordination and deal flow.
- A conference engagement model where each Conference can connect to its Campaign, Campaign Members, Tasks, Events and related activity.
- Automated follow-up task creation for Leads and Opportunities based on Altree's follow-up timeframes.
- Improved visibility of previous and recurring conference activity by grouping conference names across years.
- Email and calendar activity brought closer to Salesforce through Outlook / Exchange and Einstein Activity Capture setup.
- Reports and dashboards prepared to surface useful metrics from the new CRM structure.

## What this shows

This case study shows Cloud Genii's philosophy in practice: start with the business process, then build the Salesforce structure around it. The value was not in adding unnecessary complexity or forcing a large custom build. It was in turning Altree's investor outreach, conference, fundraising and follow-up model into a practical Salesforce foundation using Sales Cloud, Campaigns, Activities, automation and reporting. The result is a system that gives the team clearer structure, better follow-up discipline and a stronger base for future expansion into more advanced investee, impact or grantmaking processes.