

## Success Story

### Developing a Pioneering Intelligence Platform for Alternative Asset Investors



Alternative asset raising requires data-driven campaigns and digital engagement for success. This enables alternative asset managers to continuously surface investor intelligence and better understand the requirements of inundated investors. It's an approach that transforms alternative asset raising from a manual, speculative practice to a highly targeted, precise process. However, it must be underpinned by advanced software and data engineering to generate data that can be digested and analysed, that is accurate and granular, and that generates clear, actionable insights.

The most comprehensive, accurate and granular alternative asset investor intelligence platform is provided by Juniper Place. A technology-led investor intelligence, advisory and placement services provider, Juniper Place is transforming the nature of alternative asset raising and pioneering change for the sector. Its class-leading platform addresses the specific requirements of each client with bespoke solutions.

Leading global asset managers using the platform requested functionality to generate investor intelligence data for the family office investor segment. Juniper Place turned to Digiterre, who had helped deliver the first iteration of the platform, to help build the structure and administration of a brand new portal. This would feature multiple improvements including the family office functionality.



***Digiterre delivered beyond expectation. The end result is a class-leading family office intelligence portal with a level of granularity that equips alternative asset managers with the insight to truly understand their clients' needs.***

***The software development process was highly effective due to Digiterre's close collaboration with our team, strong project management expertise and pragmatic, results-oriented application of their leading-edge technical capabilities. It contributed to the acceleration of our business growth, a significant component of which is driven by technology innovation and development.***

**Paul Harvey**  
CEO, Juniper Place

# Success Story

**digiterre**  
A Collabera Digital Company



## Project Goals

Digiterre was engaged to add a new dimension to the intelligence platform's alternative asset class hierarchy, featuring the family office investor segment, and build a client specific administration panel to enable search by investor location, investor segment, and alternative asset class type.

In addition, Digiterre was asked to apply a new front-end design and build functionality to allow for various data view and download options.

## Key Benefits

The project resulted in a completely new and refreshed class-leading investor intelligence platform for alternative asset managers, which was delivered to a very tight time scale. It is gaining wide adoption throughout the alternative investment community from family offices to managers running a diverse set of funds and strategies from insurance-linked securities (ILS) to infrastructure.

Empowering Juniper Place's clients with a faster, leaner process and increased impact, the platform:

- Rigorously maps 12,000 active alternative investors around the globe, including 2,000+ family offices.
- Profiles all relevant investors in granular detail and provides alternative asset managers with the insight to truly understand their clients' needs, segment and precisely target only those investors where there is genuine mutual interest and filter out mis-matches to reduce speculative calls.
- Has a unique interface which is visually attractive, simple and yet highly targeted and granular in nature.

Juniper Place was also able to use its domain expertise and data from the platform to contribute to the recent co-branded BlackRock Global Family Office Survey.

## Our Solution

Digiterre worked in close partnership with Juniper Place to apply advanced software and data engineering capabilities to update and refresh Juniper Place's investor intelligence platform. The core development work was to build a family office investor segment dimension and a client specific administration panel. This enabled data dimension permissions such as toggling on/off access by investor location, including country and region, by investor segment, such as pension funds, sovereign funds or family offices, and by alternative asset class, such as hedge funds, private equity or insurance-linked securities (ILS).

In addition, Digiterre built functionality to allow for various views of the data, such as the division of investor content into multiple pages, the display of summary portal data on entry, and a "request deep dive" button, and delivered the new front-end design created by a third party designer.

An Agile approach was applied to pragmatically revisit and iterate plans, and build in flexibility and contingency. For example, working closely with the Juniper Place team, we identified the most urgent, important tasks for focused, immediate execution, especially where it supported Juniper Place's clients' specific needs. We continuously iterated and reprioritised requirements, and eliminated non-essential tasks, for the future roadmap.