

# Quotient Investors Turns to SatuitCRM

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**FOR IMMEDIATE RELEASE**

## **Quotient Investors Turns to SatuitCRM to Facilitate Client Services and Operations**

*New boutique manager leverages Satuit's investment-industry focus to help grow business*

To help meet its challenges as a growing start-up boutique manager, Quotient Investors, LLC deployed SatuitCRM by Satuit Technologies, a global leader in sales force automation (SFA) and client relationship management (CRM) solutions for the professional investment market. SatuitCRM is designed specifically for the investment community helping Quotient to streamline its business development, direct mail and customer communications efforts.

Satuit's solution is the first CRM solution for the firm and helps Quotient organize its ability to transmit information to our clients, such as emails in emergencies, or send updates, including new products and portfolio performance, to prospects and consultants. SatuitCRM tracks the efficiencies of the mailings and prioritizes any follow-up efforts. Additionally, SatuitCRM helps with compliance in terms of keeping records of all communication – emails, marketing materials sent, RFPs, client correspondence, newsletters, etc.

"SatuitCRM has quickly become a very important tool for our business," said Julia M. Peter-Kerr, managing partner of Quotient Investors, LLC. "Our primary requirements were ease of use, web-based, customizable, and integration with Money Market Directory or Nelsons. I did not want a system that cost a fortune or one that needed an IT department to get it up and running. SatuitCRM met all of our needs, and we have been very satisfied with the system and service. I have worked with several other CRM systems, both inexpensive and expensive solutions, and did not find any of them as good as SatuitCRM. As a fledgling boutique manager with limited resources, I am now able to reach out to many more consultants and prospects than I otherwise would have with other CRM solutions."

Currently, SatuitCRM is integrated with Microsoft Outlook, allowing Quotient to record all emails with a single click. Quotient also tracks press mentions of clients, consultants and prospects and sends quarterly newsletters, which can be formatted for distributions in less than a minute, compared with half a day for the manager's previous solution. Quotient appreciates the fact the Web-based solution can be accessed from anywhere, is customizable and provides seamlessly integration with Money Market Directory.

"SatuitCRM is a scalable solution that will grow with Quotient, helping to meet the needs of the emerging firm CRM for years to come," said Karen Maguire, CEO of Satuit Technologies, Inc. "Traditional CRM applications simply are not designed to fulfill the unique requirements of the investment community, so we built from the ground up, a ready-to-install, best-of-breed CRM solution that serves the needs of the industry. SatuitCRM facilitates relationship management for investment companies of all sizes from small boutiques to multi-national organizations with hundreds of users and thousands of clients. We look forward to working with Quotient and supporting its ongoing growth by continuing to provide the right combination of features with ease-of-use and flexibility."

### **About Quotient Investors**

Quotient is a boutique US equity portfolio management firm that was launched in March 2008. Quotient was the first manager selected for the California Public Employees Retirement System (CalPERS) Manager Development Program II, following a search process conducted by Strategic Investment Group. The firm offers multiple U.S. equity products, including Large Cap Structured Equity, Large Cap Growth and Value, Small Cap Core, and Small Cap Growth and Value. Quotient was founded by its three managing partners: Andre Bertolotti, Director of Research and Strategy Development; William Yost, Director of Portfolio Management and Trading; and Julia Peter-Kerr, Director of Client Service and Sales. Prior to founding Quotient, the team worked together at DIAM USA, Inc. (formerly DLIBJ Asset Management USA, Inc.). For additional information on Quotient Investors, visit [www.quotientinvestors.com](http://www.quotientinvestors.com) or call 212.685.4811.

### **About Satuit Technologies**

Satuit Technologies, Inc. is a global leader in sales force automation (SFA) and client relationship management (CRM) solutions for the professional investment market. The company's SatuitCRM system was designed to enable asset management and hedge fund companies to increase sales, better serve their clients, master information-intensive business relationships, and reduce costs. With offices in the United States and the United Kingdom, Satuit serves clients in more than a dozen countries as well as every major financial center. For additional information on Satuit Technologies, visit <http://www.satuit.com> or call 781.871.7788.

