

Investor relations and fundraising CRM tools have become mission-critical for private equity (PE) and venture capital (VC) firms. But with specialized solutions like **Altvia** and **Navatar** both built on top of Salesforce, how do you decide which platform aligns best with your firm's workflows? Before we get into the weeds, we'll also reference other industry players such as **Affinity**, **Dynamo**, and **Intapp DealCloud** to provide a balanced perspective. Along the way, we will zero in on key themes: relationship intelligence vs manual CRM upkeep, sourcing-led workflows and warm intros, governed deal execution and investment committee (IC) process control, and fund administration and back-office depth.

Understanding the Landscape: Salesforce as the Foundation

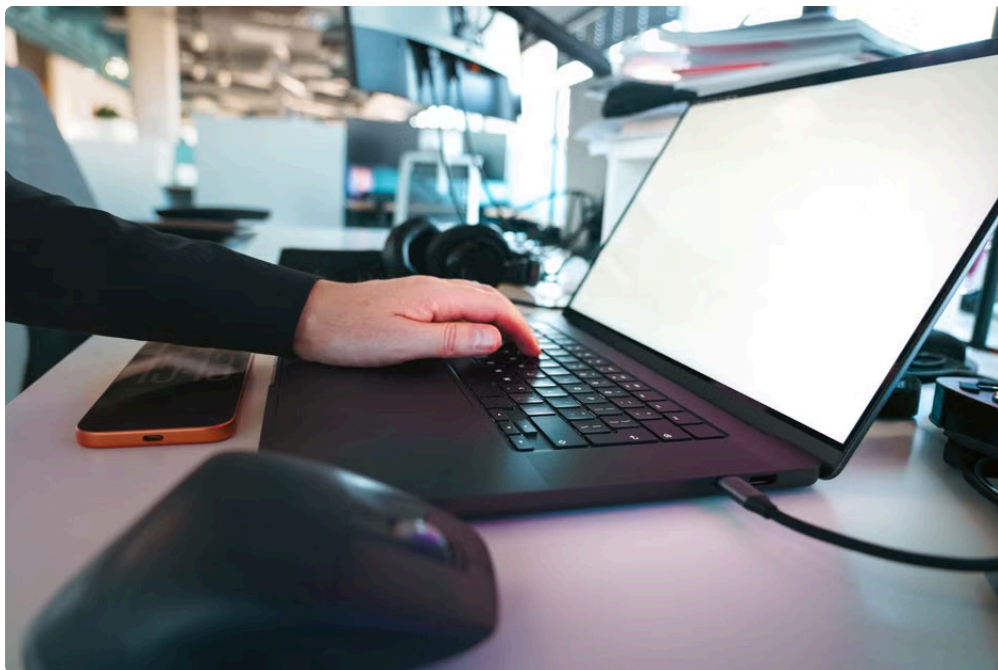
Both Altvia and Navatar are built as Salesforce-native solutions. This offers firms the flexibility of a proven enterprise-quality CRM platform combined with vertical-specific modules designed for private capital markets. The question is how each vendor layers on relationship intelligence, workflow rigor, and fund administration features to address LP profiles, ILPA reporting, and the needs of a fundraising CRM.

Before diving in, here's a quick note on other vendors that may come up in your vendor evaluation:



- **Affinity**: Known for machine learning-based relationship intelligence and network-driven deal sourcing.
- **Dynamo**: Focuses on fundraising workflow and LP data management, gaining traction mainly with general partners.
- **Intapp DealCloud**: More of an all-in-one platform with emphasis on deal execution and compliance controls.

In this context, Altvia and Navatar occupy somewhat different positions on the spectrum between manual CRM upkeep and fully automated relationship intelligence.



Relationship Intelligence vs Manual CRM Upkeep

This is the divide that separates many fundraising CRMs from network-first platforms today. Relationship intelligence is about surfacing insights actively — who knows whom, when you last connected, what the shared interests are — without relying on tedious manual CRM upkeep.

Altvia's Approach

Altvia historically puts a strong focus on clean, structured data management with some automation features. Their tools include:

- **Source:** A deal sourcing application that emphasizes warm intros and tracking introduction relationships.
- **InFlight:** Pipeline tracking and investor portal for LP communication.

Altvia encourages disciplined data entry and leverages Salesforce workflows to keep deal and LP information current. They don't heavily tout AI-driven contact discovery but emphasize accuracy and governance.

Navatar's Approach

Navatar on Salesforce offers a richer ecosystem of investor relations tools that blend configurable pipeline management with some relationship insights. Features include:

- Investor and LP profile management tied dynamically to deal flow.
- Interaction logging and automated reminders to reduce missed follow-ups.
- Integration with workflows for fundraising closes and capital calls.

While Navatar automates reminders and data syncing, it still largely relies on disciplined CRM upkeep. It's better suited for firms willing to invest in data hygiene and process adherence than those expecting AI to do all the heavy lifting.

Comparative Note on Affinity and Dynamo

Just as a contrast, Affinity emphasizes relationship intelligence and network analysis using AI to surface important contacts, while Dynamo automates much of the LP data management and fundraising workflows but requires

solid effort on CRM activities as well.

Sourcing-Led Workflows and Warm Intros

One of the critical differences in fundraising CRMs is how they support sourcing-driven pipelines and relationship building, especially facilitation of warm intros which remain the lifeblood signalscv.com of private capital fundraising.

Altvia's Sourcing Tools

Altvia's Source platform is uniquely designed to help firms track and manage sourcing efforts. It enables teams to log intro requests, link contacts, and visualize relationship paths — all within Salesforce. The emphasis is on structured workflows that promote accountability around sourcing activities.

Navatar's Warm Intro Capabilities

Navatar supports warm intros through customizable pipelines and communication tracking but doesn't currently offer a dedicated sourcing workflow module like Altvia Source. Instead, relationship management tends to be built into deal and investor pipelines, relying on users to actively log engagement.

Impact on Deal Sourcing Strategy

If your firm prioritizes sourcing as a repeatable process — with clear milestones, accountability, and visibility across teams — Altvia may suit you better. Navatar's strength lies more in overall investor relations pipeline flow instead of sourcing-specific workflows.

Governed Deal Execution and IC Process Control

Governance in deal execution and investment committee (IC) processes is not just compliance; it's about creating trust, ensuring consistency, and optimizing decision-making cadence across multi-office funds.

Altvia's Investment Process Governance

Altvia leverages Salesforce's native capabilities to enforce stage gating, task assignments, and document management through configurable workflows. Their solution helps enforce IC approvals, track deal committee notes, and integrate fundraising progress with deal status.

Navatar's IC and Deal Execution Tools

Navatar provides workflow automation for deal execution steps and IC approvals, with emphasis on audit trails and role-based access control. Their modules enable managing fees, expenses, and compliance documents — important for PE funds with complex back-office needs.

How Intapp DealCloud Compares

Intapp DealCloud is often praised for deep deal and compliance controls, including nuanced IC approvals, conflict checks, and integration with legal workflows. While Altvia and Navatar provide foundational governance, Intapp aims at established firms needing granular control.

Fund Administration and Back-Office Depth

Beyond CRM and IR workflows, fund administration—covering capital calls, distributions, LP reporting, and compliance—is the engine room of PE operations.

Altvia's Fund Admin Capabilities

Altvia offers integrations and modules to facilitate fund administration but largely partners with third-party administrators or relies on ERP systems. Their strength lies in generating accurate LP profiles and enabling ILPA-compliant reporting but does not have a full accounting suite.

Navatar's Depth in Back Office

Navatar extends into fund admin with features that track capital commitments, manage waterfalls, and provide integrated fund and portfolio reporting, making it a more comprehensive solution for firms aiming to unify CRM and fund admin functions on Salesforce.

Synergies with Dynamo and Others

Dynamo and Intapp DealCloud also offer deep fund administration capabilities, often integrated with CRM modules, intended for firms seeking full-stack workflow coverage from LP relationship management to back-office reconciliation.

Summary Table: Altvia vs Navatar on Key Themes

Theme	Altvia	Navatar	Relationship Intelligence
Primarily manual CRM upkeep with disciplined data workflows; no heavy AI. Automated reminders and engagement tracking; still relies on manual data entry.	Sourcing-led Workflows	Dedicated sourcing app (Source) with emphasis on warm intros and accountability. No dedicated sourcing workflows; relationship tracking integrated within pipelines.	Governed Deal Execution & IC Control
Configurable Salesforce workflows enforce gating and compliance. Robust deal execution automation with audit trails and role-based access.	Fund Administration Depth	LP profile management and ILPA reporting supported; fund admin primarily outsourced.	Integrated capital call, distribution, and waterfall tracking with reporting.

Closing Thoughts: Which Should You Choose?

Altvia shines for firms that want a Salesforce-native solution emphasizing sourcing-driven workflows and governance while maintaining clean, structured data entry protocols. It works best in firms willing to invest in disciplined CRM processes rather than expecting automation to solve relationship intelligence challenges.

Navatar offers a strong integrated solution for investor relations teams that want to combine CRM with fund administration on one platform. It's a compelling choice where automation of pipeline workflows and back-office depth are priorities, provided your team commits to upkeep.

Compare this with vendors like **Affinity** for AI-driven relationship insights or **Intapp DealCloud** for deep deal and compliance governance to identify what fits your firm's maturity and scale.

My Two Cents (operational fanatic alert!)

In evaluating these tools, my first question is always: *Who is doing the data entry?* It's the Achilles' heel of all fundraising CRMs. A solution with beautiful dashboards and neat workflows is worthless without disciplined user adoption and clear ownership of data hygiene across sourcing, IR, and fund admin teams. Beware of vague AI promises without defined inputs and outputs. The devil is in your firm's processes, not just in feature checklists.

Ultimately, choosing between Altvia and Navatar comes down to your firm's way of working. Do you want a dedicated, governed sourcing pipeline with reliance on process discipline (Altvia)? Or a broader suite integrating investor relations and fund administration with moderate automation (Navatar)? Both can leverage Salesforce's power — the difference is in vendor philosophy and your operational priorities.