

How KKR Raised \$1M in 1 Month and Streamlined Investor Management with CapRaise CRM

KKR Wealth Group

KKR Wealth Group is a US-based investment firm that raises capital for passive income, real estate, and infinite banking strategies. They provide investors passive income opportunities to personalize financial guidance and create sustainable cash flow. With CapRaise they were able to **raise \$1M in capital in their first month.**

THE CHALLENGES

KKR lacked a clear system to manage the full investor journey from first touch to committed capital. They struggled with **scattered outreach, poor qualification, and a legacy CRM that couldn't scale.** Key activities like tracking webinar attendees and automating follow-ups were done manually, leading to missed opportunities and slow investor engagement.

THE SOLUTION

- **All-in-one capital raising platform** – Fully integrated with third-party apps
- **Personalized email campaigns** – Track outreach and follow-up activity
- **Analytics dashboards** – Monitor marketing performance, leads, and investor conversions
- **Dedicated pipelines** – Separate workflows for different business units
- **Lead engagement insights** – Identify the most active and interested leads



How We Helped KKR

After implementing CapRaise CRM, KKR transformed their workflow—**centralizing fundraising, automating investor engagement, and gaining data-driven insights to prioritize high-value leads**. The outcome? A streamlined process that accelerated growth while saving time and resources.



\$1M+ capital raised



2x increase in lead sources



Multiple automated pipelines across business units



Real-time tracking of top 10 engaged leads



Significant time savings by eliminating manual workflows



Stronger investor qualification through deeper data insights

Facing similar challenges?

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