

# Case Study

## Venture Capital Fund

### Client background

A medium-sized technology venture capital fund with offices in Ireland, Great Britain and the USA needed a service to communicate with current and potential investors and to manage all the internal flow of communication.

Their existing processes relied on hard copy documents, email or USB sticks for the exchange of confidential financial information with interested parties. These methods proved to be inefficient when exchanging large volumes of information. Hours were spent organising and looking for email attachments, hindering overall productivity and prolonging the investment process. There was also a risk of security being compromised.

### Business Objective

As part of the new fundraising exercise the client had embarked upon, it was especially interested in providing information to potential investors in a secure and more efficient manner to increase the level of information disclosed, to gain greater feedback and to speed up the process.

### Engage Solution

- Engage took a leading role helping the client design and structure all the information flow to adapt it to its activity.
- A dedicated area was set up with relevant folders in the platform into which all the information could be securely uploaded. All data was encrypted.
- User were set up with appropriate permissions to access relevant areas and folders in the platform.
- The client was able to produce reports showing if, when and how often investors had looked at key information.
- A Q&A capability was provided to enable the client to engage with investors and deal with any questions or issues.



## Benefits

- ▶ Client was able to easily share the relative confidential information from one area with the investors and advisers spread across different offices, geographical locations and time zones by invitation at the click of a button.
- ▶ Giving users appropriate permissions to access one platform enabled the client to securely manage all deal documentation without the risk of data leaks or breaches.
- ▶ Using the platform to upload all the information into one space, rather than sending hard copy material, e-mails or USB sticks, saved time. It made the entire process easier and less cumbersome and allowed the client to focus on executing the transaction.
- ▶ Using the Engage corporate investor interaction platform, the project was launched in two weeks and within 2 months, the client moved all its flow of information to Engage.
- ▶ The reporting function helped the client gauge the interest level of the various potential investors and provided an indication of their possible concerns.
- ▶ Leveraging the Q&A functionality of the platform, the client was able to quickly address the queries related to the information in the documents uploaded. This also made the process more responsive while giving the client greater insight into investor appetite.

Engage is a SaaS corporate investor interaction platform. It is a Perivan product built using Ethos Data technology.

Perivan provides expert solutions and works flexibly with client teams to drive impactful results across the financial and professional services sectors and beyond. A long-standing heritage in print and skilled corporate design has evolved over the years and today, Perivan proudly offers technology-led communications expertise for investor and shareholder relations and for marketing services.

Ethos Data is a global provider of Virtual Data Room and confidential document sharing services.

Their dataroom service allows organisations to exchange confidential information securely and efficiently. Services include Virtual Data Rooms, Fund Management and Investor Communications.

Since 2007 EthosData's Virtual Data Rooms have been helping businesses exchange critical information. Today EthosData's secure data room technology is used by tens of thousands of professionals. Our clients include 8 of the top 10 global financial organisations and 4 of the top 5 global law firms.

To find out more about Engage, please get in touch with us via email at [engage\\_enquiries@perivan.com](mailto:engage_enquiries@perivan.com) or call us on +44 (0)20 7562 2250.

