



# Engage

# Introducing Engage



## The smart corporate and investor interaction platform

Engage is an on-line file-sharing tool for improving investor engagement and corporate activity in a secure, efficient and collaborative manner.

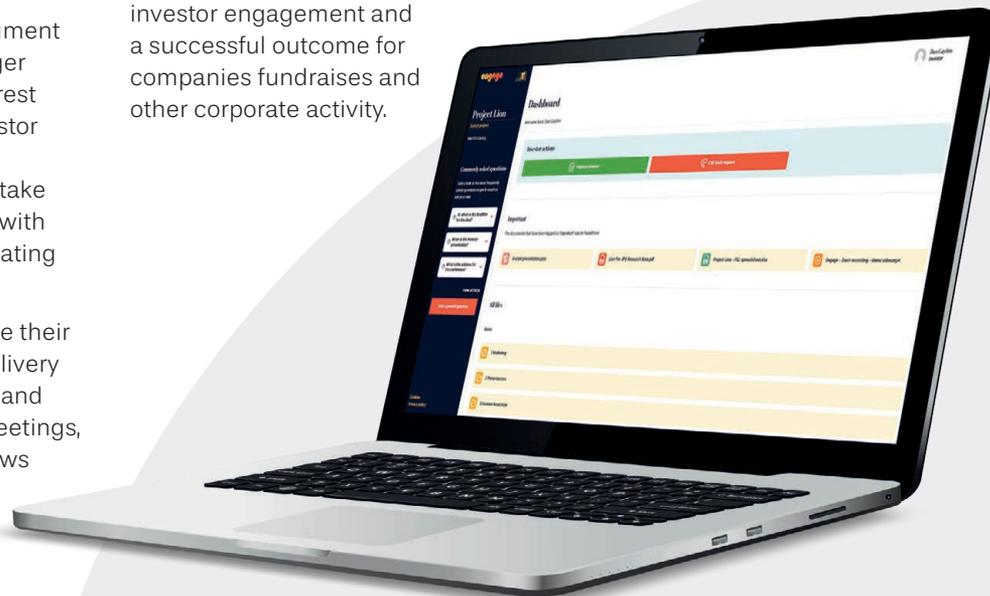
Typically, these important confidential information exchanges have been managed in an unsecure, time-consuming, inefficient and expensive way, i.e. over email or by post. This poses a real risk of documents being mis-used or sent in error which could in turn lead to FCA breaches. Recipients are frustrated by not having all the information in one easily accessible place and there is no way of knowing if or when those documents have been viewed, meaning companies risk missing out on significant fundraising opportunities as a result.

Engage, is a data room which allows information to flow securely, quickly and tidily to all key stakeholders. Access is controlled through a granular, permission-based system and the document tracking capability shows who is viewing each document and for how long they linger helping to gauge the interest and appetite of each investor from a simple dashboard. Deeper engagement can take place within the platform with the Q&A/task function creating real-time opportunities.

Organisations can improve their carbon footprint too as delivery of hard-copy information and physical attendance at meetings, conferences and roadshows is no longer necessary

when the same objectives can be achieved in a smarter, more virtual way.

The Engage platform has been built by Perivan to ensure a user friendly experience, more efficient and cost effective investor engagement and a successful outcome for companies fundraises and other corporate activity.



# Problems Engage solves



## Security

Sending attachments by email or using commercial file sharing sites puts your business at risk of data leaks and security breaches.

Engage offers the highest standards of security with data encrypted in transit and at rest. It's hosted in world-class data centres and Multi-Factor Authentication is included as standard. Flexible user permissions also ensure you control the resources and access levels available to each user.

Engage was developed by Perivan, the leading producer of investor documentation and annual reports, to improve security when sharing content with our clients. Security is part of our DNA and all of our processes and frameworks are ISO27001 certified.



## Lack of visibility

Using many different channels of distribution (email, Dropbox, Google drive) makes it difficult for administrators, investors, clients, and employees to find content.

Engage provides one central, structured platform where all items can be easily searched and found via an intuitive interface. This gives you visibility of all content securely shared within your business and with third parties. It also gives your investors and clients quick access to all the information they need.



## Compliance risk

Manually saving a version history and audit trail of all documents and interactions with clients and investors is time-consuming and prone to human error. Do you want to take the risk of exposing your business to regulatory failings and legal proceedings because of a lack of corporate governance?

The intelligent tracking features within Engage automate the audit trails and version history of all shared content, saving you time and helping you to comply with regulations to reduce your risk. Detailed analytics and reporting dashboards allow you to evidence all interactions if you are audited.



## Missed opportunities

Have you missed investment or sales opportunities and lost revenue because of a lack of insights into your clients' and investors' interests and activities?

Engage will help you identify opportunities, ensuring you are notified each time someone opens the information you've shared. The reporting dashboard allows you to monitor all shared content and analyse how much time they spent reading each page. This allows you to focus on the people who are most interested in your products and services.



## Inefficient processes

It's time-consuming for administrators manually saving audit trails to meet regulatory requirements and responding individually to investor questions.

Free your team of the administrative burden by automating audit trails and version history when sharing content with investors, clients, and employees. Share answers to common questions with multiple users rather than having to respond individually.

# Why choose us

## Supporting you - a partner you can trust and rely on

A "can-do" personal approach from a highly experienced and dedicated team differentiates us in the marketplace.

**We could not have executed this fundraiser as quickly, professionally and as easily as we did, without the Engage data room.**

**Matt Goldhil**  
Founder  
Picnic



# About Perivan

Perivan provides expert solutions to the financial and professional services sectors and beyond. Our long-standing heritage in print has evolved over the years and today we proudly offer skilled services in the production of annual reporting and corporate finance documentation, creative corporate design and technology-led shareholder communications, investor interaction and marketing services platforms.

## Corporate Access

**Engage** – a corporate and investor interaction platform – is built on data room technology and provides secure, controlled sharing of key company information. The platform allows content tracking and audit and has built-in Q&A and calls to action capabilities. It is a solution for those involved in fundraising, investor relations, sales, compliance and board communications. Engage will eradicate security and data breaches, overcome the risk of non-compliance, eliminate missed sales opportunities, avoid client/investor frustration and cut out operational inefficiencies and waste.



Our corporate and investor interaction platform

## Corporate Actions

We offer on-demand print services to meet all of your corporate finance documentation requirements. Excellent typesetting and printing, mailing and customer service are all handled in-house with a 24-hour, fast turnaround service. We specialise in main market IPO prospectuses, merger and acquisition documents, whitewash circulars, rights issue documents, EGM circulars, AIM admission documents, fundraising documents, disposal documents, placing and open offer documents and offer for subscription documents.

## Financial reporting

Our financial reporting team have a long history of working with AIM and main market listed companies and funds, helping them design and produce their annual, interim, ESG and other reporting requirements.

We have a portfolio of over 210 listed clients whose needs can range from a simple, tightly budgeted production through to a full design service, which can be adapted at any stage of their corporate journey.

We partner with fellow LSE Issuer Services Marketplace member, Parseport, to provide ESEF (European single electronic reporting format) reporting. This serves as an important extension to our established services and delivers an additional service offering to our 216 LSE listed annual report clients.

## Marketing services

**Enable** – our marketing distribution and brand management platform – is used by leading financial services organisations such as St. James's Place and Octopus Investments to automate the creation, personalisation, approval, and distribution of their marketing materials. Using a built-in asset library, it ensures all content is up-to-date, compliant, on brand and approved before circulation and distribution. Enable will stop compliance risks, eliminate brand inconsistency, cut out inefficient process and waste and take the brakes off of speed to market. It will also improve visibility and collaboration within your teams, help your budgets go further and improve your achievement of ESG targets.



Our marketing distribution and brand management platform

Perivan is a unique team of specialists with a passion for delivering investor, shareholder, customer and marketing communications.

Our extensive experience enables us to offer services to help you deliver at every stage of your corporate journey.



# Your main point of contact



**Dan Gaydon**

**e: [dgaydon@perivan.com](mailto:dgaydon@perivan.com)**

**d: 0207 562 2260**

**m: +44 7393 557876**

**[perivan.com](https://perivan.com)**

21 Worship Street  
London EC2A 2DW

# Your main point of contact



**Graham Bowstead**

**Business Development Director**

**gbowstead@perivan.co.uk**

**t: 0207 562 2260**

**m: +44 (0)7393 943111**

**perivan.com**

21 Worship Street  
London EC2A 2DW