

The art of the possible in action

Case studies for the firm of the future

Get started here



Embrace the art of the possible

The art of the possible is your opportunity to leverage technology for a differentiated LP experience. And, it's essential that you think beyond today to achieve and maintain that goal. To help, we created an ebook examining our tips from our recent webinar on becoming a firm of the future. And to demonstrate how other firms have been successful in each of the 3 most critical areas, we've organized links to relevant case studies:

- 1. Free your data
- 2. Buy rather than build
- 3. Pivot from problems to solutions

Free your data

You derive value from your information when you centralize and structure it to build models and visualize it to make business decisions. So, you need to ensure the flexibility and availability of your firm's proprietary info via data management functionality that supports advanced information initiatives.



Midwest Growth Partners Fortifies Data Accuracy and Accessibility

Midwest Growth Partners kept data in a variety of spreadsheets, as well as Outlook calendars and contact records, making it difficult to ensure that information was accurate, organized, and accessible. They needed a better way to share information and interact across the firm—and also wanted to improve business continuity. So, MGP began looking for an advanced solution for data management and communication and ultimately deployed Altvia.

Read the full case study here <https://altvia.com/midwest-growth-partners-case-study/>

"And when it comes to getting information from managers, Altvia lets us ask 20 questions in the time it would take in Excel to ask one. We're able to do much deeper diligence faster. In fact, we have GPs who were formerly heads of data science at large, enterprise companies that look to us for our data." —Kelli Fontaine, Cendana Capital



Cendana Capital Harnesses Their Unstructured Data for Competitive Advantage

Cendana Capital started with just two people—so they were initially able to get by using Excel, email, and other siloed tools to capture and maintain data. But, this approach proved untenable with growth. It was difficult to manipulate data, there were filtering limitations that affected the number of co-investors that could be tracked, and their spreadsheet list kept getting bigger. The firm simply didn't have a cohesive data management strategy or the technology to support one—that is, until Kelli Fontaine joined the firm and implemented Altvia.

Read the full case study here <https://altvia.com/cendana-capital-case-study/>

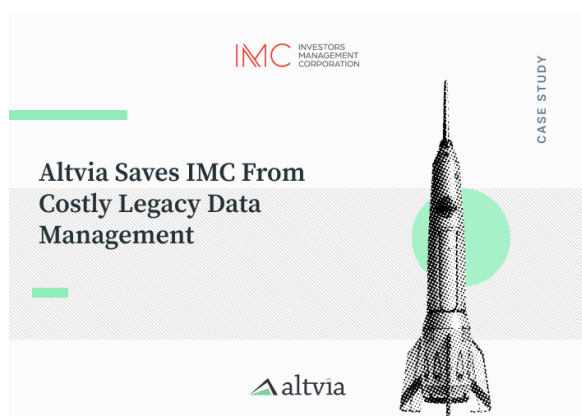
More data success stories

- ▶ Growth Catalyst Partners: <https://altvia.com/growth-catalyst-partners-case-study/>
- ▶ Spire Capital: <https://altvia.com/case-study-spire-capital-leverages-altvia-to-monitor-the-portfolio/>
- ▶ Crestone Capital: <https://altvia.com/case-study-crestone-capital-saves-with-aim-and-investor-correspond/>
- ▶ TechStars: <https://altvia.com/case-study-techstars-uses-aim-to-get-organized-and-facilitate-future-growth/>

Buy rather than build

Don't lose time to software development that you could be devoting to implementation and adoption. Determine your firm's goals and workflow priorities, then demo 3 to 5 software offerings to establish the most efficient and effective option for accomplishing them. Chances are, you'll be able to find a software package that gets you at least 70% there. Then, you can leverage domain expertise to customize as necessary.

"Most of the consultants we talked to just asked what we wanted and said they'd build it for us. But what we wanted was someone to tell us what works best in the industry, what other groups have used, and how they have ideally set up systems that work at other organizations like ours." —Joel Hausman, Crosslink Capital



IMC Ditches Costly Legacy Data Systems

IMC was using a CRM system that allowed for significant customization. But, the approach proved expensive and time-consuming—and the underlying platform was not specialized enough to handle their unique needs. Plus, IMC wanted a reliable way to track the relationships that exist between and among various contacts in their database. IMC learned about Altvia, and they decided to implement the platform. While some customization was required, deal tracking and relationship management functionality came out of the box. And, they saw data management benefits almost immediately.

Read the full case study here <https://altvia.com/case-study-altvia-saves-imc-from-costly-data-management/>



Crosslink Eliminates Pockets of Data

Crosslink migrated to Salesforce to eliminate their pockets of data in various systems and reliance on multiple spreadsheets. They brought in a consultant to customize the platform for their business, but the resultant instance didn't effectively track their client hierarchies or provide timely information on their clients and investments. The firm found Altvia on the Salesforce AppExchange and ultimately deployed and configured it to:

- Consolidate investor data onto a single location
- Store data in an orderly and efficient manner
- Delineate between venture and hedge fund client

Read the full case study here <https://altvia.com/case-study-crosslink-uses-aim-for-fund-management-database/>

More software success stories

- ▶ RCP: <https://altvia.com/case-study-rcp-gets-insightful-data-through-enhanced-reporting/>
- ▶ Edge Natural Resources: <https://altvia.com/case-study-edge-natural-resources-investor-relations/>
- ▶ IVP: <https://altvia.com/case-study-ivp-streamlines-fundraising-with-altvia/>

Pivot from problems to solutions

Prior to engaging in any product demonstrations, you should determine your biggest pain points across firm functions and build a list of high-level requirements. Next, zero in on how each provider will partner with you to help you solve your identified problems.

"Altvia has a lot of experience with what works and what doesn't work. They are a good governor for what is realistic versus what is possible, and they helped us start small and grow into a system that has allowed us to scale while institutionalizing our processes and staying true to our core competency of investing in the lower middle market."

—Michael Plainter, Plexus Capital



CASE STUDY

Phoenix Equity Partners Optimizes Operational Efficiency with Altvia





Phoenix Drives Efficiencies With CRM Functionality

Due to ongoing growth and a drive to optimize efficiencies, Phoenix Equity Partners pursued a new cloud-based CRM platform after 20 years on a system with limited functionality. Realizing the importance of using an industry-standard CRM platform and one that was designed specifically for Private Equity, the firm selected AIM. With Altvia's deep business and IT expertise, Phoenix Equity was able to:

- Easily replicate their business processes in a more simplified workflow
- Operationalize the firm's Private Equity experience and knowledge into an automated tool

Read the full case study here <https://altvia.com/case-study-phoenix-equity-partners-optimizes-operational-efficiency/>



CASE STUDY

Plexus Capital Paves The Way For Firm Growth With Altvia





Plexus Paves The Way For Firm Growth

With more than 30 portfolio companies, multiple transactions in varying stages of due diligence, and a diversified and growing LP base, Plexus's execution and reporting requirements were growing exponentially. They realized that they needed to ensure both consistency of data across all their reporting platforms and process rigor to their deal flow, execution, and portfolio oversight. So, they began researching fund management software to help. Plexus chose AIM from Altvia because it's a CRM solution specifically designed for Private Capital Markets. The solution quickly delivered results, with Plexus reporting more efficient deal flow, due diligence, portfolio, and overall fund management processes.

Read the full case study here <https://altvia.com/case-study-plexus-paves-the-way-for-firm-growth/>

More solutions success stories

- LFM: <https://altvia.com/case-study-lfm-uses-altvia-to-maximize-deal-sourcing-integrations/Gro>
- ClearVision: <https://altvia.com/case-study-clearvision-equity-uses-private-capital-platform/>

*Become a firm of the **future***

To get more tips like those presented in this ebook and understand the steps you need to take to think beyond today, contact **Sales**. Or, go to altvia.com for more information or to watch our recorded webinar.

