



Case Study:

ClearVision Equity Increases Workflow Efficiency With Altvia

"AIM on Salesforce was a big plus for me. It allows us to continue to customize as we need for future growth."

Ryan Zachary
Vice President



CLEARVISION EQUITY
OVERVIEW



LOCATION:
San Diego, California



INVESTOR TYPE:
Private Equity, Venture Capital



INVESTMENT STAGE:
Early & Late Stage Venture, Seed



FOUNDED:
2017

PARTNERSHIP SUMMARY



- IMPLEMENTATION
- Data Management
 - Business Intelligence
 - Secure Engagement



YEAR IMPLEMENTED:
2019

ABOUT CLEARVISION EQUITY

In 2017, ClearVision Equity launched its first investment. In a few short years, the firm has completed over 25 investments across a variety of Southern California industries.

ClearVision is a small, experienced team with a high success rate and currently manages about \$30 million of committed capital.

THE CHALLENGE

Before Altvia, ClearVision needed a fundraising tool to track investor information, send emails, and organize & store files. Ryan Zachary, Vice President at ClearVision, was able to accomplish that with 8 pieces of software, including Box and HelloSign. What tied the systems together were API connections, which would often disconnect if one platform had an update.

“Inevitably, an update would create a domino effect, and I would have to reconnect all the systems.” Zachary went on to say, “It became too much, I would spend quite an amount of time reconnecting the systems, and it wasn’t sustainable.” After enough times of reconnecting the platforms, Zachary knew the firm was at an inflection point, and it was time to look for a Private Equity specific solution.

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THE SOLUTION

In his research, Zachary narrowed down platforms, and Altvia was the top of the list due to the platform's customizability. "AIM on Salesforce was a big plus for me. It allows us to continue to customize as we need for future growth."

Zachary also liked that Altvia's Investor Portal, ShareSecure, was easy for their team and investors to manage documents and signature requests. "The ability to quickly update documents and files depending on the investment made it a big time saver," Zachary went on to say, "I was most impressed with the Altvia AIM to ShareSecure interoperability that I didn't see with other competitors on the market."

Zachary then connected with Altvia's Director of Solution Architecture, Christopher Wojack, "Chris came to our office in San Diego and met with us in person. He went above and beyond, answering questions regarding the platform and what implementation would look like. The whole experience allowed me to gain confidence in Altvia's ability to deliver highly customizable products specific to my use cases. "Chris was technical as well as very personable, and he knew what solutions were necessary for our firm's goals". While these three factors solidified ClearVision's partnership with Altvia, it was the appeal of the product suite working together that led to their decision.

Altvia's CRM solution, AIM, gave ClearVision a centralized database for all their investor information. Correspond Investor and Market Editions made it easy for Zachary to create and send both specific and broad emails and review delivery reports to ensure that the updates or commitments reached the right audiences. ShareSecure gave ClearVision a user-friendly LP Portal to track, share, and sign investor documents.

ClearVision Equity's final thoughts:

"Switching to Altvia's platform was not only a timesaver but also allowed us to have all our information in one place, it's the platform as a whole--I have tasks, calendars, email marketing, SPV and LP information seamlessly connected all in one place, unlike our tools previously. It has truly become my source of record on our investments."