


Case Study:

Edge Natural Resources Is On Top Of Their Game With Investor Relations

"I wanted to be ahead of the game and ensure a smooth process and investor experience."

Stacie Moore
Partner & CFO

ENR OVERVIEW

 LOCATION:
Dallas, Texas


 INVESTOR TYPE:
Private Equity




 INVESTMENT STAGE:
Growth Equity

 FOUNDED:
2015

 # OF EMPLOYEES:
10

PARTNERSHIP SUMMARY

 IMPLEMENTATION

-  **Data Management**
-  **Business Intelligence**
-  **Secure Engagement**

 YEAR IMPLEMENTED:
2015

 # OF USERS:
7

ABOUT EDGE NATURAL RESOURCES

Edge Natural Resources is an energy private equity firm focused on opportunities in upstream exploitation and development with aggregate commitments from a diverse base of foundations, endowments, and family offices. The firm is experiencing strong momentum and as they grow, so do their operations and investor demands.

THE CHALLENGE

To help solve these growth challenges, management applied 25+ years of combined private equity experience in selecting a solution to help consolidate, organize and integrate their workflows and fund management along with investor communications. Their most recent experience included managing 300+ investors across multiple funds.

This experience was brought over to Edge Natural Resources with careful evaluation of cloud-based CRM solutions that could integrate with backend accounting systems as well as front-to-back solutions.

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THE SOLUTION

“What led me back to AIM was a good experience and its ease of use. The decision really came down to people – who you know, who you wanted to help you succeed,” shares Stacie Moore, Partner, and CFO, of Edge Natural Resources.

In addition to AIM, Edge Natural Resources also selected Correspond Investor Edition to simplify investor communications like capital calls and document splitting as well as ShareSecure to manage the volume and coordination of investment materials. By implementing this integrated solution from the beginning, Edge Natural Resources has gained a competitive advantage.

“The business needs involved the information and manner in which we touch our LPs – communicating with investors in a seamless way that’s accurate and efficient. I wanted to be ahead of the game at Edge Natural Resources and ensure a smooth process and investor experience,” comments Moore.

In relation to the onboarding experience, the implementation process involved a dedicated project manager and support team to ensure adoption, data integrity and training.

“When working with the implementation team of Altvia, this team really wanted to know our goals and workflows and then understood the end game so I could get to where I needed to be,” shares Moore. And with a prescriptive approach calibrated to Edge Natural Resources, the process was streamlined and effective by sharing best practices and providing customized training.

With this foundation in place, Edge Natural Resources plans to expand applications for the system and optimize processes with current private equity specific modules and workflows.

What are the most important benefits? “Time and investor perception,” comments Moore. For example, Edge Natural Resources gains significant time savings when distributing a capital call through a more automated, integrated workflow. And to service the number and breadth of investor demands, the firm provides a high touch investor experience with consistent communications, reliable reporting, and timely investment materials.

The derived benefits represent a partnership. “I do think that people make decisions differently and I make decisions based on relationships. I could tell that relationships are important to everyone I’ve dealt with at Altvia. The people I work with actually care – care what I think and want to make me successful. And that to me is very important, more so than if you have all the bells and whistles – you can get that eventually anyway. But having the people who care is more important. I want to have someone that I can count on.”