

Successfully Navigating a Complex Acquisition Through Brand Transformation

How do you pivot a brand swiftly and decisively across multiple channels? That was the challenge facing iLEVEL when an acquisition required them to align with the new parent company.



INDUSTRY

Financial Technology

HIGHLIGHTS



Transformed the brand under significant time constraints



Launched the brand **across multiple channels simultaneously**



Maintained client trust and enhanced brand recognition

Challenge

When iLEVEL, a private-capital portfolio monitoring platform, became one of three companies acquired by Ipreo, it posed a considerable branding challenge. Having been through the acquisition process before, Lauren Weiner, then iLEVEL's marketing manager, knew that she would need to act quickly in order to ease the transition and protect iLEVEL's brand equity.

"iLEVEL had a phenomenal brand identity among private capital market participants, while Ipreo, our new parent company, wasn't as well known in the space," Weiner explains. "We didn't want to lose ground, but we recognized that the story was changing."

Weiner, who was tasked with heading up the marketing function for the newly formed Ipreo Private Capital Markets (PCM) division, had to navigate big changes, as some products were sunsetted, others were repositioned, and iLEVEL transitioned from a company to a product brand.

When the news of the acquisition broke, thousands of clients would want to know how the change affected them. Weiner knew that presenting them with a brand that was visually and narratively consistent across the web, social, email, and offline channels was the key to maintaining their trust.

“ We didn't want to lose ground, but we recognized that the story was changing. ”

Lauren Weiner, Director of Marketing, Ipreo PCM

Approach

As soon as the merger was confirmed, Weiner contacted DemandLab, who had been working with iLEVEL for a year prior to the merger. "We see DemandLab as an extension of our team. They know our Marketo, our Salesforce, and our business inside out. So we didn't hesitate to pull them in when we needed to transform the brand."

DemandLab helped Weiner and her team identify all the moving parts and put together a swift plan of attack that targeted the most critical brand elements and touchpoints:

Visual brand: A fresh yet familiar brand for Ipreo PCM was crafted from recognizable elements of both the iLEVEL brand and that of the new parent company.

Key messaging: A new mission statement, boilerplate, and product positioning was developed to encompass the new solution areas and situate them within the parent company's broader goals.

Website: Navigation was tweaked, new pages were developed, and SEO was adjusted to maintain iLEVEL's current share of search while building up traffic flow for Ipreo PCM's new product areas.

Templates: Because email was an important prospecting and client communication channel, DemandLab redesigned all Marketo templates to reflect the new brand.

Client experience: Redirects and Marketo landing pages were ingeniously deployed so that every client was greeted with a seamless login experience and a familiar and reassuring interaction with the site.

Challenge

- Data quality:** Because of their hands-on approach to investing, Venture Capital (FFVC) needed to go beyond financial statement data and access diverse data sets that enable them to ask smart questions of their portfolio companies.
- Data collection:** FFVC has close to 100 companies in their portfolio, and their deep level of involvement with each company required the collection, aggregation, and parsing of detailed financials on a regular cadence.
- Data utility:** With data arriving irregularly and being stored in a variety of locations and formats, gaining a complete and detailed view of the firm's portfolio financials and individual company performance is challenging.
- Reporting:** Communicating actionable, data-driven insights to internal and external audiences is critical, but keeping up with reporting demands and requirements can be a hugely time-consuming.

Solution

- iLEVEL provides qualitative metrics and KPIs that are specific to each company and its industry type.
- iLEVEL streamlines the process for collecting data from their portfolio companies on a regular basis.
- iLEVEL creates a single source of truth that's accessible and actionable in real time on mobile, tablet, and web portal.
- iLEVEL generates a range of reports including LP presentations, portfolio company insights, and auditor and evaluator submissions.

Result

Within three months, the iLEVEL implementation team had customized a platform that consolidated historical data for FFVC's portfolio companies and captured the metrics and data points the firm needed on an ongoing basis.

The firm now has a means of collecting and using a wide range of qualitative metrics and KPIs, which supports their proactive approach to investment and value creation.

"iLEVEL has alleviated one of our major pain points—collecting, aggregating, and parsing financials on a regular cadence," explains Alex Katz, Partner and CEO of FFVC. "It helped us make the data accessible and actionable in real time across multiple platforms, so that we can see when companies are lagging or exceeding, take action, and provide effective counsel."

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▲ IPREO CASE STUDY

CASE STUDY: MIDDLE-MARKET PRIVATE EQUITY FIRM

Quick Facts

Customer: A middle-market private equity firm. Visit www.valuations.com/clients/ for a complete list of iLEVEL™ clients.

Challenge: Request to accelerate performance reporting, streamline quarterly portfolio reviews and expedite the valuation process for investments through effective organization of data from portfolio companies.

Solution: iLEVEL Private Capital Data Platform.

Customer Benefits:

- Reduced the time to review and validate data for monthly dashboard reports by almost 50%.
- Automated collection of portfolio company data empowered the firm to assemble, analyze and disseminate data more efficiently, streamline valuations, conduct portfolio-wide analysis and more quickly prepare fundraising materials and LP presentations.
- The iLEVEL platform provides a central repository of portfolio company data for all teams at the firm to analyze and track investments.
- Improved communication and collaboration between the firm's portfolio administration, finance and deal teams.

EFFECTIVELY ORGANIZE AND ANALYZE DATA

Middle-market Private Equity Firm Accelerates Value Creation by Deploying iLEVEL for Automated Collection and Centralized Storage of Portfolio Company Data

Challenge: A middle-market private equity firm that invests capital on behalf of its limited partners in niche businesses with solid market share, considerable growth potential and opportunities for value creation was looking to accelerate reporting, valuations and its quarterly portfolio review process. The firm's areas of expertise include food, business services, manufacturing and healthcare industries. Its mission is to achieve superior long-term returns for its investors by leveraging its experience and industry relationships.

As a data-driven organization that uses actionable insights to boost growth and create value within its portfolio companies, the firm wanted to better monitor and manage key financial data and operational KPIs of active and value investments. In order to successfully accomplish these objectives, the firm was looking for a turnkey solution that could automate the collection of financial, operational and qualitative data from portfolio companies for internal and investor reporting. They also required that various data, sometimes spread across many departments of the firm, be stored in a central repository as a single source of truth.

Data Environment Prior to iLEVEL:

The diagram shows a complex network of data sources including: Financial Statements, Operational KPIs, Market Research, and other data points, all feeding into a central hub for reporting and analysis.

iLEVEL CONTACT: 212.849.3800 | www.ipreo.com | PCM-GLOBALSALES@IPREO.COM **CASE STUDY**

▲ ILEVEL CASE STUDY

A company that was unknown in the industry now has a strong identity.

Lauren Weiner, Director of Marketing, Ipreo PCM

Result

Working closely with Weiner and her team, DemandLab had the new brand lined up and ready to deploy when the acquisition was publicly announced—just three months after Weiner reached out to the agency.

“Our team was juggling new management, integrating a new team, dealing with new products and new messaging, and the timelines were impossible,” Weiner said. “We were like salmon swimming upstream. Everything was stacked against us.”

“DemandLab had that combination of technical, design, and messaging experience we needed. They could handle every aspect of the shift without missing a beat. The public face of all three acquired companies, on every channel, was rebranded and redirected to Ipreo PCM overnight. And because the flow was so intuitive, we were able to shift the brand without alienating any clients.”

In addition to ensuring a smooth transition and generating a positive reaction to the acquisition, the rebrand succeeded in boosting awareness for Ipreo among private capital market participants.

“We had one chance to resonate,” Weiner explained. “There was virtually no brand recognition for our parent company in this space. But within a year, the community was talking about Ipreo and recognizing the value the company’s products offer their industry. A company that was unknown in the industry now has a strong identity.”

Unexpected Win

The rebrand was so successful that the re-invigorated brand has started to flow upstream and influence the look and feel of the parent company. DemandLab has since begun working with Ipreo to create presentation and promotional materials that capture some of the energy and modernity of the hybridized brand created for the Private Capital Markets division during the transition.

“We’re the acquired company, but because we made it our priority to build a strong and consistent brand, the parent company has taken our lead. It made them see what was possible. It raised the bar for everyone.”

PROJECT INSIGHTS

To manage change and roll out a new brand swiftly and effectively:

- Get everything lined up behind the scenes in staging sites and sandboxes. Test rigorously, then “flip the switch” so the new identity goes live simultaneously across channels.
- Put the client experience first. Think about the most frequent touch-points, such as login and support pages, and focus on making those areas as intuitive and familiar as possible to ease the transition.
- Brand re-alignment requires a nuanced understanding of your industry, your business strategy, and your marketing infrastructure. Make sure your agency partner has conducted a thorough discovery process and is fully immersed in your world.
- Don’t forget the technical dimension. While creativity is important in reshaping the brand, technical expertise (in marketing automation, CRM, and integrated apps) is paramount when disseminating it across multiple channels and market segments.
- Think small. Small tweaks can have a big impact when they’re intelligently conceived and consistently applied. The Ipreo PCM brand alignment was subtle, but it was enough to send a clear and positive message.



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