



Leveraging IMS to Scale and Formalize an Investor Communication and Engagement Program

See how one client, Foulger-Pratt, used IMS to deliver a consistent and personalized investor experience at scale without having to grow their team

COMPANY BACKGROUND

Foulger-Pratt is a real estate investment and development firm distinguished by its long-term focus and extensive experience executing successful mixed-use, transit-oriented projects. The firm's disciplined culture and vertically integrated platform have enabled it to develop more than 15 million square feet of commercial office, multi-family residential, and retail projects. Prior to IMS, the team at Foulger-Pratt did not have a comprehensive process in place for managing investor relations. As Foulger-Pratt began to look at scaling the business, it became clear that they would need a solution to formalize their investor communication and engagement program. According to Nicholai Lazarev, Acquisitions Associate with Foulger-Pratt team, "we leveraged the capabilities of IMS to build a strategic plan around the goal of implementing a new set of procedures and methods to operate more efficiently regarding managing investor relations and raising equity".



IMS has drastically improved the investor experience, and our investors absolutely love the improvements we've made to the subscription process.

Nicholai Lazarev
Associate, Acquisitions
Foulger-Pratt



KEY CRITERIA FOR TECHNOLOGY TO ADDRESS CHALLENGES

Looking for a solution that would accommodate the unique investment parameters of both friends and family investors as well as an outside investor base, Foulger-Pratt began their search for a technology solution that allowed their team to automate and scale the process of marketing new investment opportunities. Identifying the growing opportunities to capitalize in the crowdfunding marketplace, Foulger-Pratt sought a solution that allowed their team to organize and institutionalize a fundraising process with accredited investors. Without having a large investor relations team, it was important to find a tool that enabled investors to complete the entire subscription process electronically and without needing much involvement from the team at Foulger-Pratt after the offering went live.

FACTORS FOR CHOOSING IMS

Several factors went into the team's decision when comparing and evaluating investor management software providers. The ability to electronically manage back office operations was important to Foulger-Pratt. They needed a platform that included features such as a robust investor dashboard with online deal room, electronic documents with e-signatures, investor reporting, K-1 processing, and a tool to upload batch waterfall distributions. While the breakdown on cost per feature was important to Foulger-Pratt, a critical element was to choose a provider that truly understood and accommodated the specific needs of a CRE developer who focuses on ground up development deals. "IMS understands our business model as a developer and provides a platform that was flexible enough to meet our unique needs. IMS is a cost-effective solution that allows our business to grow and scale during the entire time period of an asset's development."



EXCEED INVESTOR EXPECTATIONS

Investor Dashboards enabled Foulger-Pratt to surpass investor expectations, simplifying the process of contributing capital to a project while saving the team time and resources



IMS has proven to be a cost effective, scalable solution that our entire organization can get value out of, from accounting to finance to acquisitions and more. Our onboarding process was extremely seamless and enabled us to begin using the platform right away.

IMS SUCCESS STORY & RESULTS

IMS has enabled Foulger-Pratt to create a process to organize and institutionalize a fundraising procedure with accredited investors that their investors genuinely enjoy using by taking a process that primarily related on spreadsheets and turned it into a modern, mobile investor experience. In addition, as a company without a robust investor relations team, IMS enabled Foulger-Pratt to stay lean and leverage their resources while continuing to grow and scale. The Investor Dashboards provide a one stop shop for investors to participate in deals and stay up to date with important documents and communications, which supports efforts to raise equity faster. "IMS has allowed us to transform the way we operate and run more efficiently."

Interested in learning more? Give us a call at 1-800-239-3398



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