

COGENT
CONSULTING



Client Stories

iPondr Global





CLIENT: iPondr Global

DETAILS: Social Enterprise

SERVICES: Campaign design and support to a Social Enterprise seeking Impact Investments

DURATION: 3 months

THE SUMMARY

iPondr Global is launching a new digital media network to foster a more interconnected American society: iPondr.com. Created as a Public Benefit Corporation with both a profit motive and social purpose, iPondr is seeking investors to support its development and launch in 2020. It is a new “American essential” that portrays authentic life across the country; using data, blog, audio, video, photography, and e-newsletter. Weaving a genuine narrative in each programming area; from Sports and The Economy to Culture, Climate, Faith, Health, Games, and more.

Kate Mortenson, the founder, has a vast and powerful personal network and wanted to expand her investor outreach strategy. At the recommendation of Kate Wolford, the former President of the McKnight Foundation, Kate asked Cogent Consulting for their impact investing expertise to create a strong investor relations strategy. Now, iPondr Global:

- Uses state of the art investor communications materials
- Executes a strategic and targeted campaign to obtain the right kind of investors

The Situation

iPondr's founder Kate Mortenson knows how to raise money. As President and CEO of the Minnesota Final Four Organizing Committee, she not only raised adequate funding, she ran the operation to turn a \$1 million profit, unheard of in Final Four experiences. Kate has an extensive network but needed to reach the right people at the right time with the right ask. She also wanted to reach beyond her own network and build a set of compelling materials that would attract new investors. Kate needed a consulting team to work with her who would maintain the strictest confidentiality of the business model and those who are in her private network.

The Solution

FEASIBILITY ASSESSMENT OF THE IMPACT INVESTING POTENTIAL

In order to determine the potential for investments, Cogent Consulting assessed the business model, launch strategy, impact measurement plans, and other materials for feasibility to obtain impact investors. They also identified additional critical information needed for a successful campaign. The Cogent team shared their results and recommendations for action in a collaborative, respectful, and direct manner with the iPondr Global team.

CREATING A STATE OF THE ART IMPACT INVESTOR PRESENTATION

Cogent Consulting worked side by side with iPondr leadership and staff to craft effective investor specific communication materials that would provide insightful, focused content to investors. Cogent continues to be available throughout the campaign to adjust the materials based on presentation experiences.

CREATION OF A STRATEGIC POSITIONING PLAN THAT WILL GET RESULTS

Cogent Consulting reviewed the existing and prospective investor contacts iPondr intended to approach. They then used the Cogent network that includes the Twin Cities Impact Investing Ecosystem members and the expanded national Cogent networks to identify and prioritize a list of possible investors. Cogent provided advice all along the process about individualized approaches and ways to improve.

CONFIDENTIALITY GUARANTEED

Strict confidentiality is critical for iPondr's selection of consultants. The unique nature of their new products and the critical nature of the expectation of privacy of those on their lists of potential investors required the selection of a consulting firm that had an extensive reputation of confidentiality and trust. The two partners in Cogent Consulting are CFA and CAIA certified and as such follow the CFA Code of Conduct, which is required for all employees and consultants working for Cogent Consulting.

Outcomes

- iPondr Global has a feasible plan to obtain investors.
- Kate Mortenson has new knowledge about impact investing and can navigate the industry. She is able to transfer important parts of her extensive experience in grant and donation fundraising into the work of impact investing.
- Pondr Global is actively seeking investors with confidence.



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