

Everpure Case



**Everpure Transforms Their IR Program with
an Integrated CRM and Actionable Insights**

Leveraging Q4's Full Stack of Technology and Client Support, Pure Storage:

Dramatically improved ROI on investor outreach.

Gained a deep level of visibility into their program.

Effectively prioritized investment opportunities.

Anticipated the changing tide of shareholder positions.

A Mid-cap Technology Company With Big Ambitions

In addition to being functional and intuitive with easily accessible information, EA needed their IR site to reflect their brand personality. "We are a games company with the mission to inspire play. There should be a little bit of play in everything we do."

Their IR site needed "to be fluid" with the strong branding of their corporate site. Erin explains, "before the redesign our site looked like a different company." She says that now the site "feels like something we own. Q4 was able to make it feel authentic to EA."



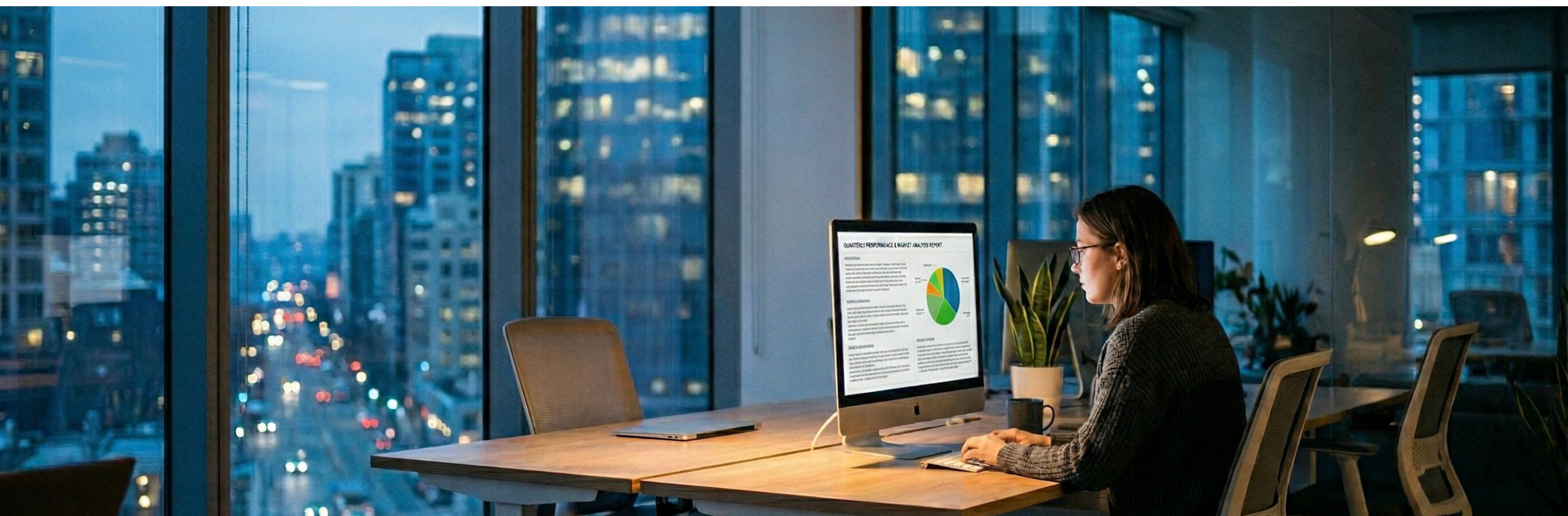
The Challenges of Streamlining Processes and Translating ROI

Pure Storage went public just over three years ago. When their new Vice President of Investor Relations, Matt Danziger (formerly IR at LinkedIn) came on board in 2017 “as an IR team of one,” he faced several challenges in coping with the IR workload. His first orders of business were to improve the efficiency of the program, the accuracy of identifying prospects, and the ability to build measurably stronger investor relationships.

With the essential belief that “everything in business is relationship-driven,” Matt’s main issues were managing Pure Storage’s inbound interest, prospecting for new shareholders, and measuring outreach ROI for his executive team. They didn’t have a reliable process for finding the right investors at the right time or tracking outreach performance, from conversations with potential investors through to investments made. Reporting on and translating the success of meetings and for “the whole ROI life cycle” was highly challenging.

Initially, Pure Storage experimented with a combination of Google Sheets and other CRMs to track and manage their entire process. But after a year of applying a piecemeal approach, Matt started looking for a more innovative and streamlined solution to simplify and optimize his outreach. He wanted something “ahead of the curve for addressing an IRO’s needs,” which could also easily and intuitively be integrated into his workflow.

As part of measuring the ROI of his IR program, Matt also sought a surveillance solution for what he described “as a lack of practical, actionable intelligence around shareholder table insights.” His previous solution gave him generic insights that were of little value. He needed more detailed analysis of who was actually interested in the company’s shares, in as close to real time as possible. Matt believed that this level of granularity into his shareholder base was what made the difference between basic IR and “good IR.”



Simplified Workflow and Actionable Intel Makes for Stronger ROI

Matt was in search of a user-friendly CRM that was designed specifically for IR professionals and could easily be integrated with the rest of his workflow. Q4 Desktop offered him all of the IR tools he needed in one platform. According to Matt: “Q4 is a one stop IR shop. There is no other industry-specific vendor who combines all the strategic needs for IR into one platform.” For Pure Storage, Q4 Desktop’s “innovative and forward-thinking” functionality was “head and shoulders above competitor platforms,” which were “difficult and confusing to use.”

It enabled them to streamline their efforts and engage better with the Street, by effectively managing all database interactions, from

investor meetings to deals in the works, email and phone correspondence, as well as roadshows and conferences. Matt also leveraged the platform’s tracking tools to easily generate detailed reports, and monitor and measure his progress.

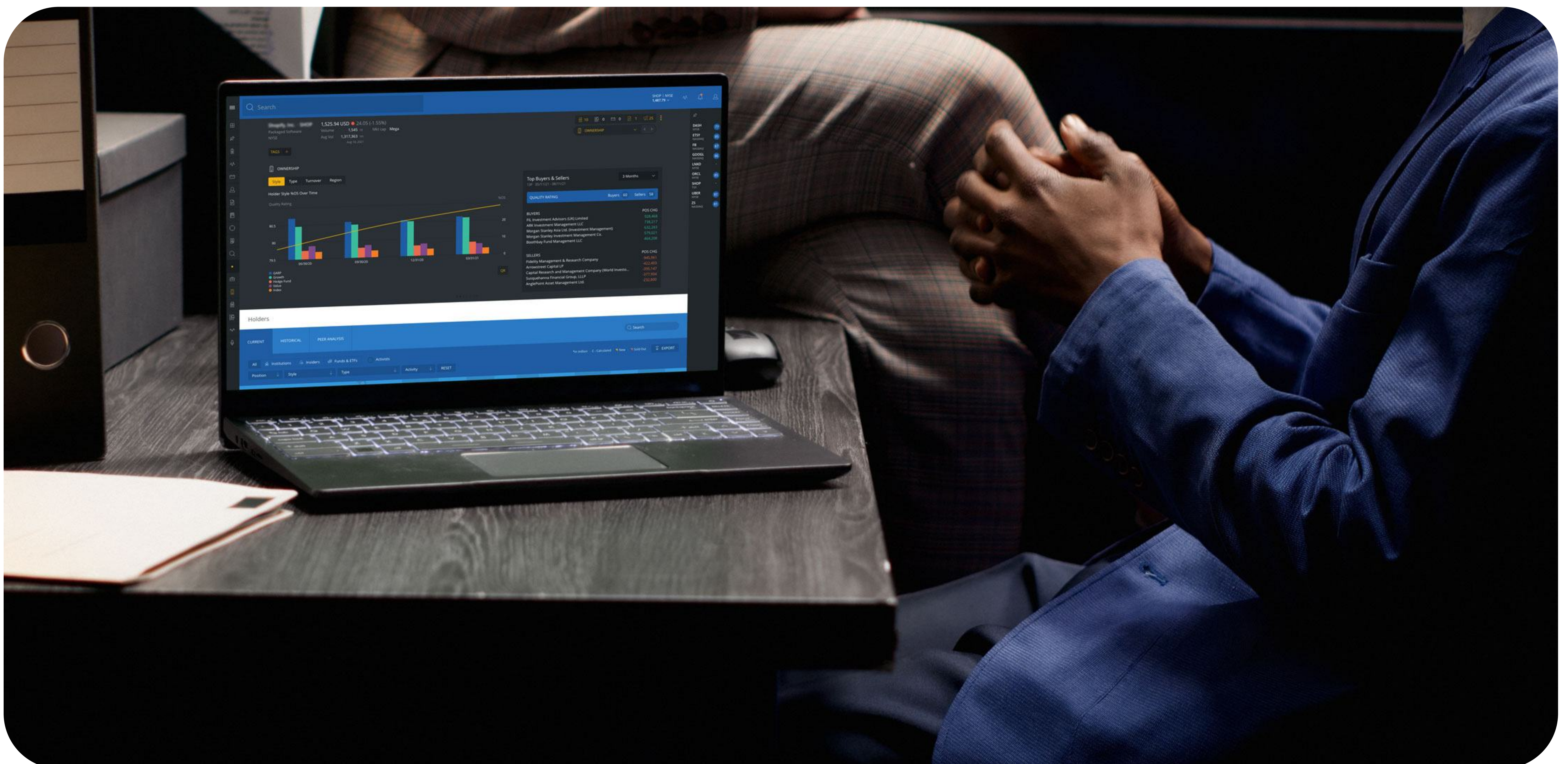


The CRM’s innovative and forward-thinking functionality is head and shoulders above competitor platforms.



Matt Danziger

VP of Investor Relations, Pure Storage





There is no other industry-specific vendor who combines all of the strategic needs for IR into one platform.



Matt Danziger
VP of Investor Relations, Pure Storage

By gaining this level of visibility into his program, he was able to decipher key insights from investor meetings and better prioritize and strategize opportunities. According to Pure Storage, this directly led to a “dramatic improvement in the ROI of investor outreach.”

Q4’s surveillance also facilitated a much greater understanding of Pure Storage’s shareholder base with actionable daily insights into his company shares. Working with Q4’s senior analysts, Matt has been able to “draw direct correlations between shareholder meetings and market moving positions afterwards.” This kind of actionable intelligence has enabled him “to dynamically track investor behaviour and stay on top of the constantly changing tide of shareholder positions, which he could then report back to his executives”.

Since using Q4 Desktop and surveillance, Pure Storage’s “all-round IR process has significantly improved,” which has resulted in their ability to show management an “overall increase in ROIs.”

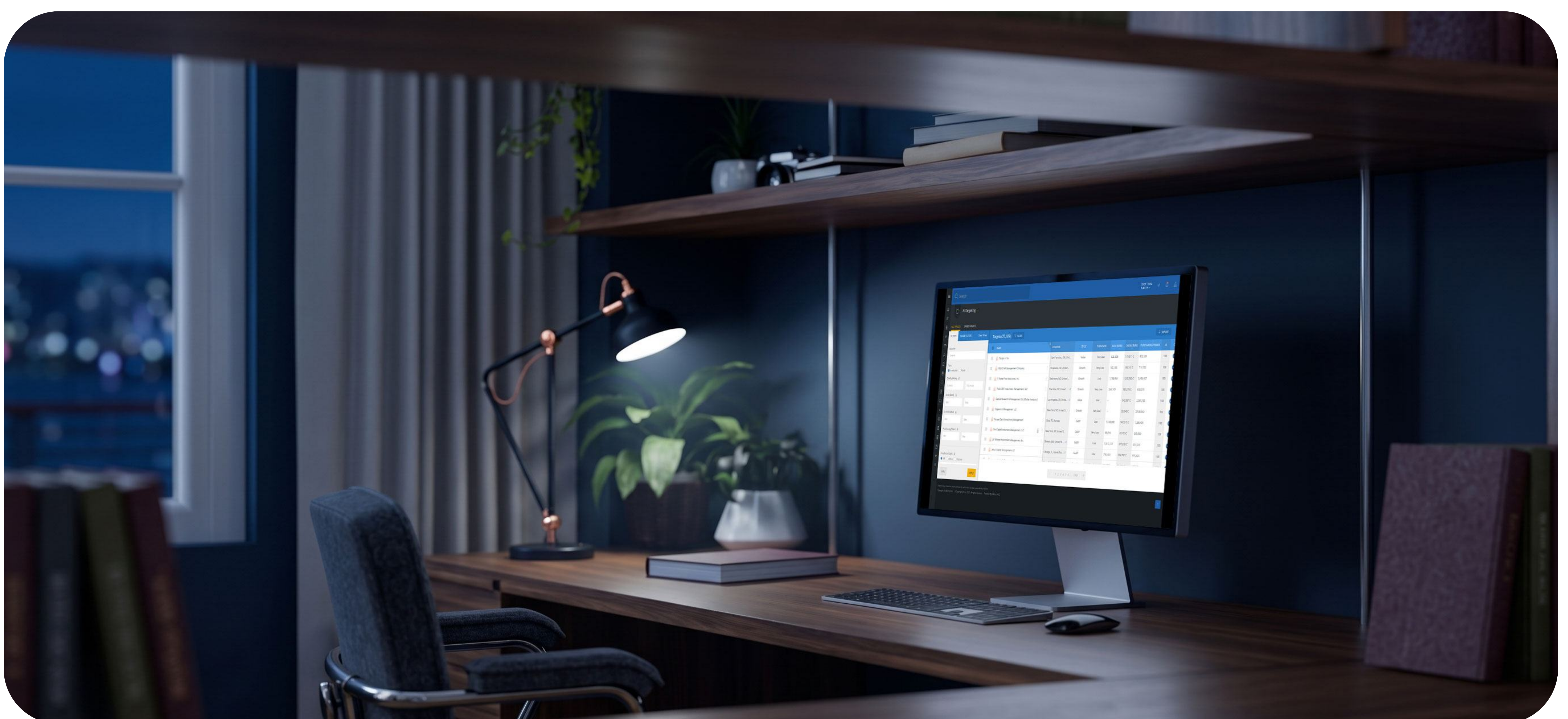


Having a partner like Q4 enables me to be truly strategic for my company ... They empower me to do my job better.



Matt Danziger
VP of Investor Relations, Pure Storage

According to Matt, “There are two ways to approach the IRO role: tactically executing IR responsibilities within the organization, or strategically connecting the dots to help the company build better relationships and ultimately achieve its vision and mission. Having a partner like Q4 enables me to be truly strategic for my company. Q4 is a great partner, because they empower me to do my job better.”





Investor Relations Platform



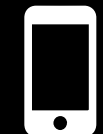
About Q4 Inc.

Q4 Inc. is the world's leading IR Ops platform, designed to unify and simplify the complex workflows between public companies and the investment community. Supporting more than 2,600 global brands, over 50% of the S&P 500, the AI-enabled Q4 Platform combines the largest amount of proprietary investor data with behavioral intelligence—helping C-suite executives and investor relations teams attract the right capital and drive premium valuations.

By unifying the entire IR lifecycle into a single, AI-enabled ecosystem, Q4 streamlines the core pillars of the profession: delivering earnings, sustaining a corporate narrative, managing guidance and analysts, and targeting investors with precision. From investor websites and virtual events to IR CRM, stock surveillance, and consensus management, Q4 provides a comprehensive suite of solutions that empowers IR teams to manage every touchpoint of their investor strategy.

Headquartered in Toronto, with a presence in New York, India, San Francisco, Boston, Mexico and London, Q4 is committed to providing the secure and compliant infrastructure that modern IR teams demand.

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