

## NorthEdge Capital

### Streamlining ESG analysis with a custom app

When private equity firm NorthEdge began the process of expanding their portfolio from 5 to 12+ companies, they realised they needed to move away from their tradition of vast spreadsheets towards a more streamlined environmental, social and governance (ESG) analysis system. Our app development team stepped in to help them design and launch an app that would collect and present the relevant data in an accessible, easily parsed format.

#### Making ESG data more accessible

“ESG matters are a pillar of our investment philosophy,” explained senior investment executive George Potts. “It’s very important for us, very important for our investors and for the senior management here, that we demonstrate that we’re looking forward and using technology to increase the efficacy of our ESG efforts.

“We used to have a big spreadsheet for every company in our portfolio, but we’re buying or investing in four or five new companies each year, which means a lot more spreadsheets and a lot more unwieldy management of data that comes off them.”



Working with...

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### In a nutshell...

#### Who are they?

NorthEdge Capital manage a £225 million private equity fund designed to provide growth and development funding for ambitious, innovative businesses in the north of England.

#### What did they need?

A faster, more user-friendly way to record, analyse and share environmental, social and corporate governance (ESG) data.

#### How did we help?

We worked with NorthEdge to develop a custom app that allowed them to record and compare their portfolio companies' ESG progress, then export to Excel for analysts.

#### What were the benefits?

- Easier access to key ESG data.
- Increased management buy-in to ESG initiatives.
- Improved data management and data integrity.
- Ability to compare various portfolio companies with a few clicks, rather than a time-consuming manual process.

For more information about our app development services, get in touch with the team on the details below.



Want to find out more?

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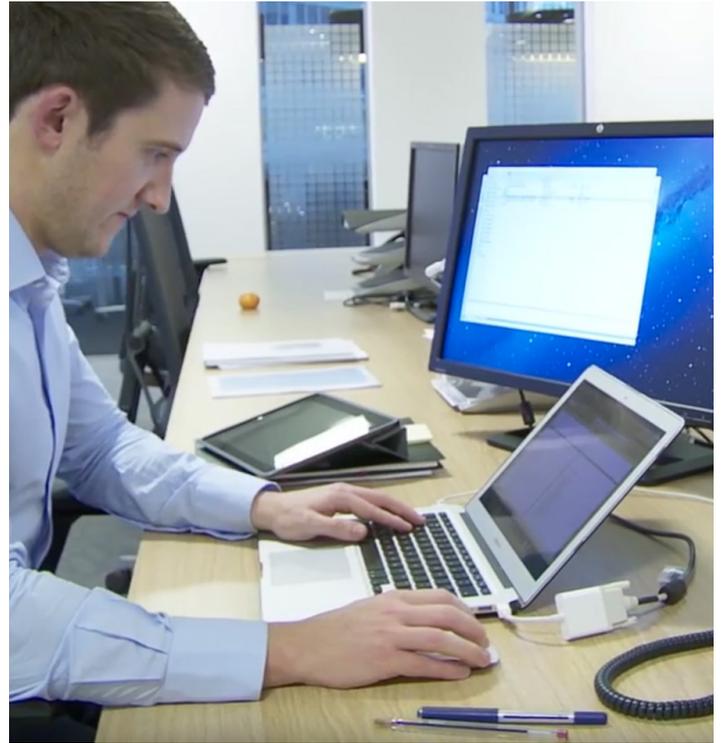
## Developing organisation-specific functionality

In order to ensure that the app dovetailed with NorthEdge's existing business practices, the team built a number of rapid prototypes, so George and the rest of NorthEdge could trial various functions and identify any gaps.

Among the functions that NorthEdge and the team scoped out after using the initial wireframe were the ability to output the results as a spreadsheet, in case anyone needed an old-style version of the ESG report; a side-by-side view that allowed analysts to see comments alongside targets and on-target measures; a summary screen for environmental, social and governance factors, as well as a cumulative total, and design changes to bring it in line with the NorthEdge brand.

"The team were very responsive," said George. "They had very strong skills both graphically and technically, everything was executed well and they helped us really get a hold of applying this to a portfolio by doing things like ensuring there was still an Excel output to capture the whole analysis. We were very pleased by how everyone worked with us."

NorthEdge were so happy with the service they received that they have even referred us to another private equity firm, OpCapita, who are now working on their own branded version of the app.



“The iterations helped the design and editing process. Running through the app you always generate new ideas, so it was a helpful process because seeing new iterations allows you to add features that you hadn't thought of before you held it in your hands.”

**George Potts, Senior Investment Executive, NorthEdge.**

## Ensuring team buy-in

Currently George is NorthEdge's main ESG app user, but they're planning to roll it out across the company's entire iPad deployment, so that partners meeting new investors will be able to talk through ESG efforts during initial meetings.

"I think the app will be helpful in getting management buy-in, and getting them to think about these very important matters in a different way," George predicts. "A large Excel spreadsheet is more of a boring proposition, whereas with the app, it's something people want to be involved in. It allows them to compare themselves with other companies and really gets people feeling like they're a part of something that other people are doing well, too."



“The Jigsaw24 team were very helpful, very responsive. They've got strong capabilities, both graphically and technically.”

**George Potts, Senior Investment Executive, NorthEdge.**

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