

USECASE.SPOTLIGHT



Kepis & Pobe, a private investment company focused on the natural resources sector, protects its valuable data, reports, and legal contracts with Vitrium's protectedpdf.

Organization:

Kepis & Pobe

Industry:

Private Investment

Location:

Vancouver, Canada

Professionals: 8

Key Challenges:

1. Control distribution of valuable investment related information to avoid unauthorized file sharing and intellectual property theft
2. Protect sensitive contracts from confidentiality breach
3. Find a cost effective solution that meets company document protection needs

Key Benefits:

1. Provide seamless access to investment related materials while still protecting valuable information
2. Able to track distribution of investment related information as a way to mitigate risk and gauge potential counter-party interest through document analytics

About Kepis & Pobe

Kepis & Pobe is a Canadian based private investment company focusing on the natural resources sector. The principals of Kepis & Pobe have financed and acted as executive management/directors of over US \$12 billion of market capitalization. The firm leverages its unique global network to incubate early stage companies with exceptional assets and management. The firm's relationships and knowledge provide the foundation for uncommon risk-reward opportunities and returns.

Generating Revenue

Kepis & Pobe targets investments encompassing the acquisition, exploration, and production of large hydrocarbon reserves. The firm is engaged in 3 to 6 deals at a given time, reviewing up to 20 a year. The firm closes 2 to 3 of these deals per year by launching new companies, each typically worth \$10mn to \$50mn at inception. Because of the high value of these deals, it is imperative that Kepis & Pobe has the right processes and protection measures in place to protect its documents. Any breach of information or leakage could be worth hundreds of millions of lost value for the company.

The Need for Protection

With every deal that Kepis & Pobe is involved in, there is significant documentation moving between investors, lawyers, consultants, and clients. This includes term sheets, legal contracts, employment agreements, scientific data, etc. related to the investment. Information is being distributed externally through email and cloud-based websites in PDF format. The partners at Kepis & Pobe produce about two hundred of these types of PDF documents each year. While the number of documents being distributed is relatively small, the value of each document is significant.

Documents are extensive, containing up to 400-500 pages in a single document, and are expensive to produce. Seismic data, for example, can cost millions of dollars to acquire. A single legal contract generated by a law firm

could cost up to \$250,000. The cost of hiring consultants to produce reports is also high.

Costs aside, there is tremendous value in the investment deals that the information supports. "These type of agreements (once signed) could represent multi-billion dollar market cap companies once they are taken public," says Clayton Brown, partner with Kepis & Pobe, "If the information falls in the wrong hands, it could mean the difference between winning or losing a deal. And with so few deals each year, to lose one due to a lack of protective measures in place on our documents would be monumental." This is why controlling distribution became a focus for Mr. Brown when he joined the organization as a partner.

Before protectedpdf

Prior to using protectedpdf, Kepis & Pobe was sending out valuable and sensitive information with no protection strategy in place. There have been cases in the past where documents got leaked to competitors and deals that Kepis & Pobe had been working on were usurped or copied by a competitor.

Kepis & Pobe considered different solutions, including commonly used virtual data rooms. "These are virtual spaces where investors can come in and review all data related to a deal. Virtual data rooms can be overly expensive for a smaller firm like us," explained Mr. Brown. Instead of having a hosted data room, Mr. Brown decided to look at protection solutions for their PDF documents.



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“The value is in what hasn’t happened.”

The Solution

Protectedpdf allows users to protect their PDF documents while allowing readers to seamlessly access content. Readers are not required to download special plug-ins or software in order to read the document. Protectedpdf is a flexible platform that can be deployed as a fully customizable on-site installation, or hosted by Vitrium Systems.

Why Protectedpdf?

Kepis & Pobe utilize some of the primary features of protectedpdf to protect information and control distribution of its investment related documents. “We primarily use Vitrium’s technology to grant and monitor access to our data room materials,” explains Mr. Brown.

Control and Protect

Some of the specific features of protectedpdf that Kepis & Pobe uses include copy, paste, and print control, watermarking, and computer lockdown. Copy, paste, and print control prevents readers from distributing PDF content in hard copies or other electronic formats. Dynamic document watermarking allows Kepis & Pobe to identify documents as confidential and which readers are redistributing content, discouraging unauthorized sharing of information. With the computer lockdown feature, Kepis & Pobe can limit the number of computers on which a reader may access a secured document, discouraging widespread online sharing of passwords and other login credentials.

Track

The access log within protectedpdf has given Kepis & Pobe tracking capabilities with its documents, tracking whenever a PDF document is opened and which IP address the document is opened on. Mr. Brown uses the

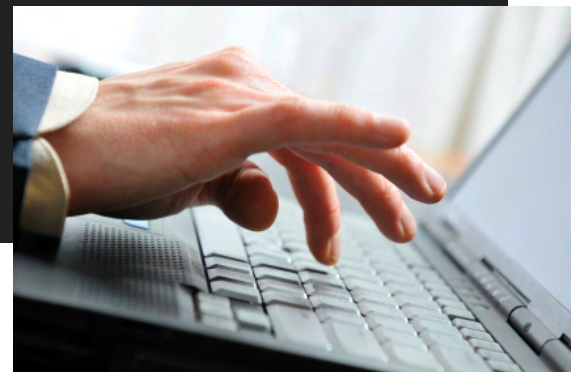
access log to see when and how often a user views a protectedpdf document. This helps him gauge the user’s interest in the particular investment deal. Using the logged IP address, Mr. Brown is also able to track where documents are being forwarded to. With this information, the partners at Kepis & Pobe are able to get a sense of user interaction with certain documents, while at the same time monitor their distribution to ensure documents are not falling into the wrong hands.

Overall Benefit

With Vitrium’s protectedpdf solution, Kepis & Pobe is able to provide confidential and proprietary information to its potential investors without worrying if it will end up in the hands of its competitors. “The value is in what hasn’t happened,” as Mr. Brown stated, “Protectedpdf gives us assurance that our investment information is securely protected and its distribution controlled. The potential loss of revenue far exceeds the investment we made into protectedpdf, as opposed to if we did not use a document protection solution at all.”

To learn more about protectedpdf or sign-up for your free trial, please visit www.protectedpdf.com or call 1-866-403-1500

“Protectedpdf gives us assurance that our investment information is securely protected and its distribution controlled.”



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more information about protectedpdf.**

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