

## Firm Snapshot

### Focus

### Fund III

### Platforms

### Add-ons

### Team

Software

\$800M

18

21

40+

7 Fund I; 10 Fund II; 1 Fund III

11 Fund I; 10 Fund II

1:1 Investment vs. Ops.

## Platform Investment Criteria



### Software Category

- Specialized / vertical application software IT
- Infrastructure and DevOps / DevTools software
- Information / data / analytics software



### Business Profile

- \$5-30M revenue, majority of which is recurring
- Proven unit economics and gross margins but flexible on current profitability
- Location agnostic across North America and Europe



### Deal Type

- Primarily focused on majority recapitalizations; will consider minority growth capital investments
- Founder-owned businesses and institutionally-backed companies
- Willing to evaluate complex situations (carve outs, take privates, etc.)

## The Resurgens Approach

Our approach is grounded in a clear commitment to actively driving value creation across each of our portfolio companies. We don't adhere to a "one-size-fits-all" playbook—every company has its own unique challenges and opportunities. With that in mind, we have assembled one of the largest and most experienced operating teams, relative to our fund size and number of portfolio companies, that leverage their experience to drive operational improvements in conjunction with management. Key focus areas include:

Investment in Products/R&D

Alignment of World-Class Talent

Go-to-Market and Operations Support

M&A Strategy Execution

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# Resurgens' Current Portfolio

## OFFICE SPACE

[officespacesoftware.com](http://officespacesoftware.com)

### RTP initial investment

**date:** November 2019

**Realization:** partial recapitalization of the business in Jan. 2022 by Vista Equity Partners

**OfficeSpace Software** offers a cloud-based platform for workplace and visitor management.

## GitKraken

[gitkraken.com](http://gitkraken.com)

### RTP initial investment

**date:** August 2020

**GitKraken** (f.k.a. Axosoft) provides cross-platform Git productivity and collaboration tools for developers, including GitKraken Client, Git Integration for Jira, and GitLens for VS Code.

## ENERGYCAP

[energycap.com](http://energycap.com)

### RTP initial investment

**date:** March 2021

**EnergyCAP** provides energy management solutions for government, education, and commercial sectors. Clients use its platform for utility bill processing, energy data tracking, greenhouse gas monitoring, benchmarking, budgeting, forecasting, and achieving sustainability goals.

## AgencyBloc

[agencybloc.com](http://agencybloc.com)

### RTP initial investment

**date:** October 2021

**AgencyBloc** provides agency management software for independent insurance agencies, offering an industry-specific agency management system and CRM, along with commissions processing and sales automation tools.

## superna

[superna.io](http://superna.io)

### RTP initial investment

**date:** March 2022

**Superna** provides unstructured data management, protection, and security solutions for scale-out network-attached storage systems, designed to help IT teams efficiently manage and safeguard data.

## Add-ons and Criteria

## Greetly

Greetly was acquired by OfficeSpace in May 2023

### Current Add-on Acquisition Criteria:

- Workplace management software focused on space and move management, visitor management and/or conference room booking
- Workplace / tenant experience solutions

## bigbrassband

BigBrassBand was acquired by GitKraken in August 2021

## GitLens

GitLens was acquired by GitKraken in October 2021

## CodeSee

CodeSee was acquired by GitKraken in May 2024

### Current Add-on Acquisition Criteria:

- Git Productivity, Compliance and Analytics

## Wattics

Wattics was acquired by EnergyCAP in August 2022

### Current Add-on Acquisition Criteria:

- Utility bill mgmt. and energy analytics solution (European customer base preferred)
- Sustainability reporting

## Formfire

FormFire was acquired by AgencyBloc in July 2022

## radius

Radius was acquired by AgencyBloc in November 2022

### Current Add-on Acquisition Criteria:

- Agency mgmt. / CRM and sales and marketing automation products
- Insurance contracting and licensing, quoting and enrollment, illustration, and other ancillary products

## DEFENDX Software

DefendX was acquired by Superna in December 2023

### Current Add-on Acquisition Criteria:

- Data mgmt., governance, orchestration and security solutions focused on unstructured data and hybrid IT environments

# Resurgens' Current Portfolio

## Case IQ

[caseiq.com](http://caseiq.com)

RTP initial investment date: April 2022

**Case IQ** provides case management software to support workplace investigation teams across industries to address cases spanning ethics and compliance, HR, fraud, security, complaints, etc.

### Add-ons and Criteria



WhistleBlower Security was acquired by Case IQ in October 2023



Lexegrity was acquired by Case IQ in January 2025

#### Current Add-on Acquisition Criteria:

- HR-focused and other vertical specific case management solutions
- Issue intake solutions
- GRC solutions

## wellspring

[wellspring.com](http://wellspring.com)

RTP initial investment date: June 2022

**Wellspring** provides SaaS solutions for innovation and IP management, supporting best practices across the global R&D market. Its software helps academic institutions, corporations, and government agencies research, develop, and commercialize new technologies.



IP Pragmatics was acquired by Wellspring in February 2023



Sopheon was acquired by Wellspring in February 2024

#### Current Add-on Acquisition Criteria:

- Innovation management products
- Tech scouting/data products
- Patent renewal service providers

## knack\*

[knack.com](http://knack.com)

RTP initial investment date: June 2022

**Knack** offers a no-code application development platform that allows businesses to build applications with drag-and-drop tooling.

#### Current Add-on Acquisition Criteria:

- API/Integration suite
- Application components (reporting, visualization, OCR, etc.)
- Form builder solution

## mcim

[mcim24x7.com](http://mcim24x7.com)

RTP initial investment date: December 2022

**MCIM** provides end-to-end maintenance, operations, and facility management software for mission-critical facilities, most notably data center environments.

#### Current Add-on Acquisition Criteria:

- Facility mgmt. (FMS), enterprise asset mgmt. (EAM) and/or computerized maintenance mgmt. (CMMS) software, particularly for critical infrastructure environments
- Data center infrastructure management (DCIM) software
- Commissioning and site selection solutions / data products focused on the global data center market

## DETECHTION

[detection.com](http://detection.com)

RTP initial investment date: June 2023

**Detection Technologies** provides remote asset monitoring and optimization software for the upstream and midstream oil and gas industry.



EZ Ops was acquired by Detechtion in July 2024.

#### Current Add-on Acquisition Criteria:

- Remote asset monitoring, optimization, or field mobility focused on upstream and midstream oil and gas

# Resurgens' Current Portfolio

## Add-ons and Criteria



**Valant** offers an EHR and practice management software platform for behavioral health professionals in solo and group practices.

[valant.io](https://valant.io)

**RTP initial investment date:** November 2023



ProHealthDesk was acquired by Valant in July 2024.

### Current Add-on Acquisition Criteria:

- Revenue cycle mgmt. offerings focused on behavioral health
- Adjacent practice mgmt. / EHR products in sub-segments such as substance abuse, ABA, etc.



**Avantra** is an observability and automation solution to help companies manage their SAP environments more effectively and efficiently.

[avantra.com](https://avantra.com)

**RTP initial investment date:** September 2024

### Current Add-on Acquisition Criteria:

- IT infrastructure and data governance solutions focused on SAP



**Relay** provides K-12 school districts with a workflow solution to document school-based services, verify compliance with government standards, submit Medicaid claims, and drive visibility and insights.

[relayhub.com](https://relayhub.com)

**RTP initial investment date:** October 2024



Educational Advantage was acquired by Relay in May 2025.

Timberline was acquired by Relay in November 2025.

### Current Add-on Acquisition Criteria:

- School-based service documentation and Medicaid billing solutions
- Adjacent software solutions with a focus on special education departments or other specialized services (mental health, nursing, speech, PT, OT, etc.)



**Movemedical** provides a software platform to enable medical device manufacturers to better manage their field inventory, surgical case scheduling and billing, and the “order-to-revenue” lifecycle for high-value, consumable medical devices.

[movemedical.com](https://movemedical.com)

**RTP initial investment date:** October 2024

### Current Add-on Acquisition Criteria:

- Supply chain and inventory management solutions for medical devices, serving both medical device manufacturers and/or healthcare providers



**OrgChart** is a leading organizational chart automation and workforce planning solution, built for HR professionals and the people leaders they support. OrgChart simplifies the complexity of HR work, providing unparalleled visibility into an organization's personnel, and surfacing valuable insights for strategic decisions about future organizational structures.

[theorgchart.com](https://theorgchart.com)

**RTP initial investment date:** January 2026

### Current Add-on Acquisition Criteria:

- Workforce planning
- Compensation management
- Performance management

# Realizations



[invmetrics.com](http://invmetrics.com)

**RTP initial investment date:** June 2017  
**Realization:** sale of business in Dec. 2022 to Confluence, backed by Clearlake and TA Associates

**Investment Metrics** provides investment performance analytics and reporting solutions for the institutional investment industry, enabling professionals to analyze and report on over \$10 trillion in assets with accuracy and efficiency.



InvestorForce was acquired by Investment Metrics in a carve-out from MSCI in October 2018



Style Analytics was acquired by Investment Metrics in December 2020



[castellanbc.com](http://castellanbc.com)

**RTP initial investment date:** May 2018  
**Realization:** sale of business in July 2022 to Riskonnect, backed by TA Associates and Thoma Bravo

**Castellan Solutions** is a global provider of business continuity software and services. Its configurable SaaS applications help businesses mitigate risk, manage recovery, and safeguard operations, employees, and brands.



Clearview was acquired by Castellan in December 2018



Avalution was acquired by Castellan in April 2020



[verityplatform.com](http://verityplatform.com)

**RTP initial investment date:** May 2019  
**Realization:** sale of business in Oct. 2025 to TMX Group

**Verity** (f.k.a. MackeyRMS) provides SaaS-based research management software and financial data services for buy-side investment professionals, including asset managers, hedge funds, and asset owners.



InsiderScore was acquired by Verity in December 2020