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Partnering With Software Companies People Love

SOFTWARE FOCUSED

CULTURE OBSESSED

Five Elms is the ideal partner for leading B2B software and tech companies

We invest \$4-40 million in companies with \$2-20 million in revenues. Minority or majority investments, growth capital or liquidity for founders and early investors.



IDEAL PARTNER FOR FOUNDERS

We specialize in partnering with founder-owned, bootstrapped businesses, working alongside management to accelerate growth and continue to build industry leading businesses. We take partnerships seriously and will work our tails off to help you succeed, but never take ourselves too seriously. Our relaxed, open, and honest working style is one of the reasons we've been successful earning founders' trust and a seat at the table in profitable businesses where additional capital is optional.



B2B FOCUS

We exclusively invest in B2B software and internet-enabled companies. This specialization has helped us build an unmatched network and



ANTI-VALLEY APPROACH

We love billion dollar outcomes just as much as everyone else, but don't believe in "unicorn or bust". We don't push companies to grow at all costs or raise mega rounds of capital - that mindset increases founder dilution and reduces the landscape of exit scenarios where everyone wins. We like managers to have both significant equity stakes and significant option value as to what outcomes can be a win.



RESOURCES AND VALUE-ADD

Our firm and Growth / Operations Support Team have been purpose-built to optimize key functions in a bootstrapped organization (e.g., sales,

deep domain expertise. Founders can supplement their industry knowledge with our experience in helping accelerate growth, overcoming positive and consistent challenges tied to scale, and de-risking the path to a successful exit for all stakeholders.



CULTURE IS CRUCIAL

Our best performing companies are obsessed with company culture - it's crucial to their success. We look to build on existing culture and don't meddle in day-to-day operations.

marketing, finance, recruiting). Our goal is to provide you the resources and expertise to supplement your already successful organization and to assist in more rapidly achieving organizational goals.



WE HUSTLE

Much like the companies we back, we aren't the incumbent behemoth in our industry - we try harder.

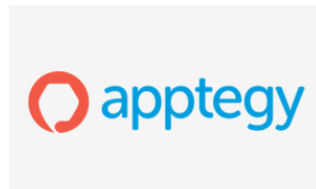
Portfolio



(<https://www.servicefusion.com/>)

Dallas, TX

SaaS provider of field management solutions for services companies



(<https://www.apptegy.com/>)

Little Rock, AR

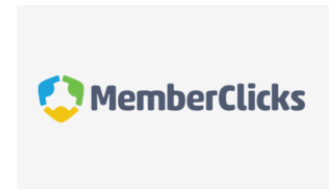
SaaS provider of communication and content publishing solutions for K-12



(<https://www.fieldagent.net/>)

Fayetteville, AR

SaaS and tech-enabled retail auditing solutions for CPG and retail



(<https://www.memberclicks.com/>)

Atlanta, GA

SaaS provider of association management solutions



(<https://www.panopta.com/>)

Chicago, IL

SaaS provider of cloud and hybrid infrastructure monitoring solutions



(<https://www.hubb.me/>)

Vancouver, WA

SaaS provider of event management solutions



(<https://www.crelate.com/>)

Seattle, WA

SaaS CRM and applicant tracking solutions for talent agencies



(<https://www.passageways.com/>)

Lafayette, IN

SaaS provider of collaboration solutions for boards and employees



(<https://rfp360.com/>)

Kansas City, MO

SaaS provider of RFP and proposal management solutions



(<https://www.playvox.com/>)

Orlando, FL & Manizales, Colombia

SaaS provider of omnichannel quality assurance solutions



(<http://smartwarehousing.com/>)

Lenexa, KS

SaaS-enabled warehousing and logistics solutions provider



(<https://get.goreact.com/>)

Salt Lake City, UT

SaaS education platform that simplifies video-based coursework



(<http://powwr.com/>)

Newtown, CT

SaaS provider of forecasting and CRM solutions for utilities



(<https://saylent.com/>)

Franklin, MA

SaaS provider of payment data and marketing solutions for banks



(<https://www.springventuregroup.com/>)

Kansas City, MO

Operates and builds consumer insurance exchanges



(<https://thepetlosscenter.cc>)

Dallas, TX and Miami, FL

Pet death and memorial solutions for veterinarians and consumers



(<https://www.selectquote.com/>)

Kansas City and San Francisco

Comparison shopping for life, auto, home, and senior health insurance

Select Prior Investments



(<https://bookly.co/>)



(<http://www.orderup.com>)



(<https://getflywheel.com/>)



(<https://trackforce.com/>)

Acquired by KPMG

Salt Lake City, UT

SaaS provider of online tax and accounting services for SMBs



(<https://www.sitehawk.com/>)

Acq. by Sphera (Genstar Capital)

Nashville, TN

SaaS provider of EHS & compliance solutions for manufacturers



(<http://epis.com/>)

Acquired by Private Equity Firm

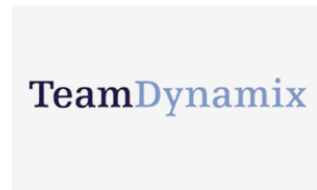
Salt Lake City, UT

SaaS provider of power market modeling solutions

Acquired by Groupon

Baltimore, MD

Software & mobile enabled food delivery platform



(<http://www.teamdynamix.com>)

Acquired by Private Equity Firm

Columbus, OH

SaaS provider of ITSM, PPM, and resource management solutions



(<http://www.spi-global.com>)

Acquired by ePLDT

Content outsourcing services in the legal, publishing, and healthcare verticals

Acquired by WP Engine (Silver Lake)

Omaha, NE

Workflow management and managed Wordpress hosting



(<http://www.fxcm.com>)

IPO (NYSE:FXCM)

New York, NY

A leading online foreign exchange trading platform



Acquired by HARMAN International

Technology-based product engineering outsourcing services

Acquired by Private Equity Firm

Paris, France

SaaS provider of field management solutions for security guards



(<http://www.gocatapult.com>)

Acq. by Mercator (Warburg Pincus)

Lenexa, KS

SaaS provider of rate management and ocean logistics solutions



Acquired by Asurion

Leading US provider of consumer product protection programs



The Flywheel team was excited to move into a new office to support its ~200 employees and growing!



Your Team

B2B Software Expertise + Connections + Value Add

We help solve the growing pains common to companies in high-growth mode: developing and prioritizing growth strategies, recruiting complimentary members to the team, growing a process-driven sales organization, institutionalizing financial infrastructure, business development / partnerships, and accessing the capital markets.



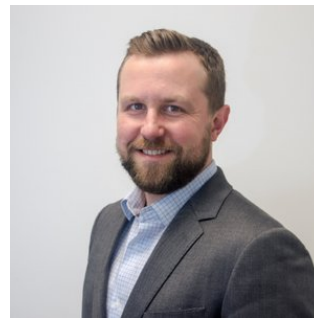
(/fred-coulson)

Fred Coulson



(/joe-onofrio)

Joe Onofrio



(/ryan-mandl)

Ryan Mandl



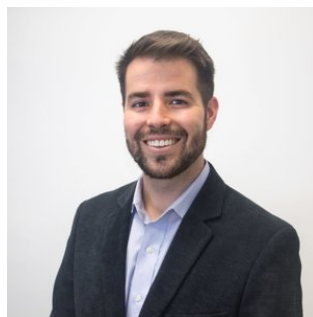
(/tom-kershisnik)

Thomas Kershisnik



(/stephanie-brown)

Stephanie Brown



(/austin-gideon)

Austin Gideon



(/kim-gordon)

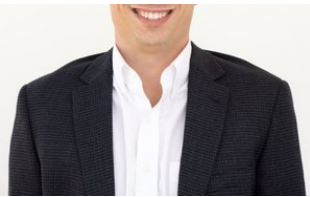
Kim Gordon



(/kristin-wantland)

Kristin Wantland





(/michael-rockhold)

Michael Rockhold



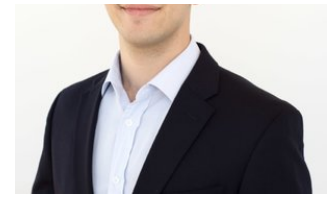
(/maren-hansen)

Maren Hansen



(/tristan-locke)

Tristan Locke



(/renato-morais)

Renato Morais



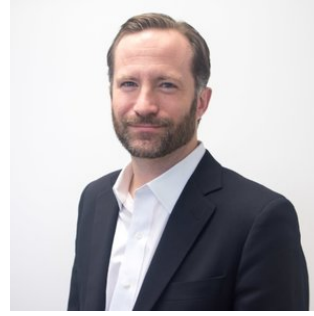
(/pat-mccalin)

Pat McClain



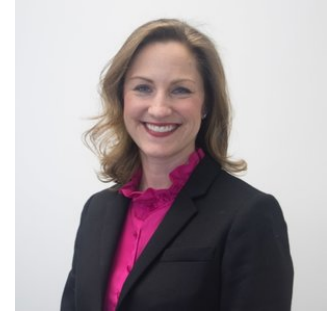
(/kalie-mccollaugh)

Kalie McCollaugh



(/duncan-mcentyre)

Duncan McEntyre



(/laura-wildman)

Laura Wildman



(/tyler-hilleman)

Tyler Hileman



(/erica-hangauer)

Erica Hangauer



(/kristin-rosberg)

Kristin Rosberg



(/alex-stancati)

Alex Stancati



(/maria-oreste)

Maria Oreste

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