



**S&O Capital**

Real results. Lasting impact.

# HELPING YOUR ORGANISATION SUCCEED WITH PREMIUM PROFESSIONAL SERVICES

We are the go-to partner for regulated industries like financial services, healthcare and pharma, offering hands-on expertise in business growth and operational efficiency.

We work alongside your teams to deliver measurable, high-impact results.

# Who we are



## Elite Expertise:

S&O Capital is an international firm composed of **senior experts** with decades of combined experience in regulated industries, including financial services and healthcare.



## Confidential and Trusted Advisors:

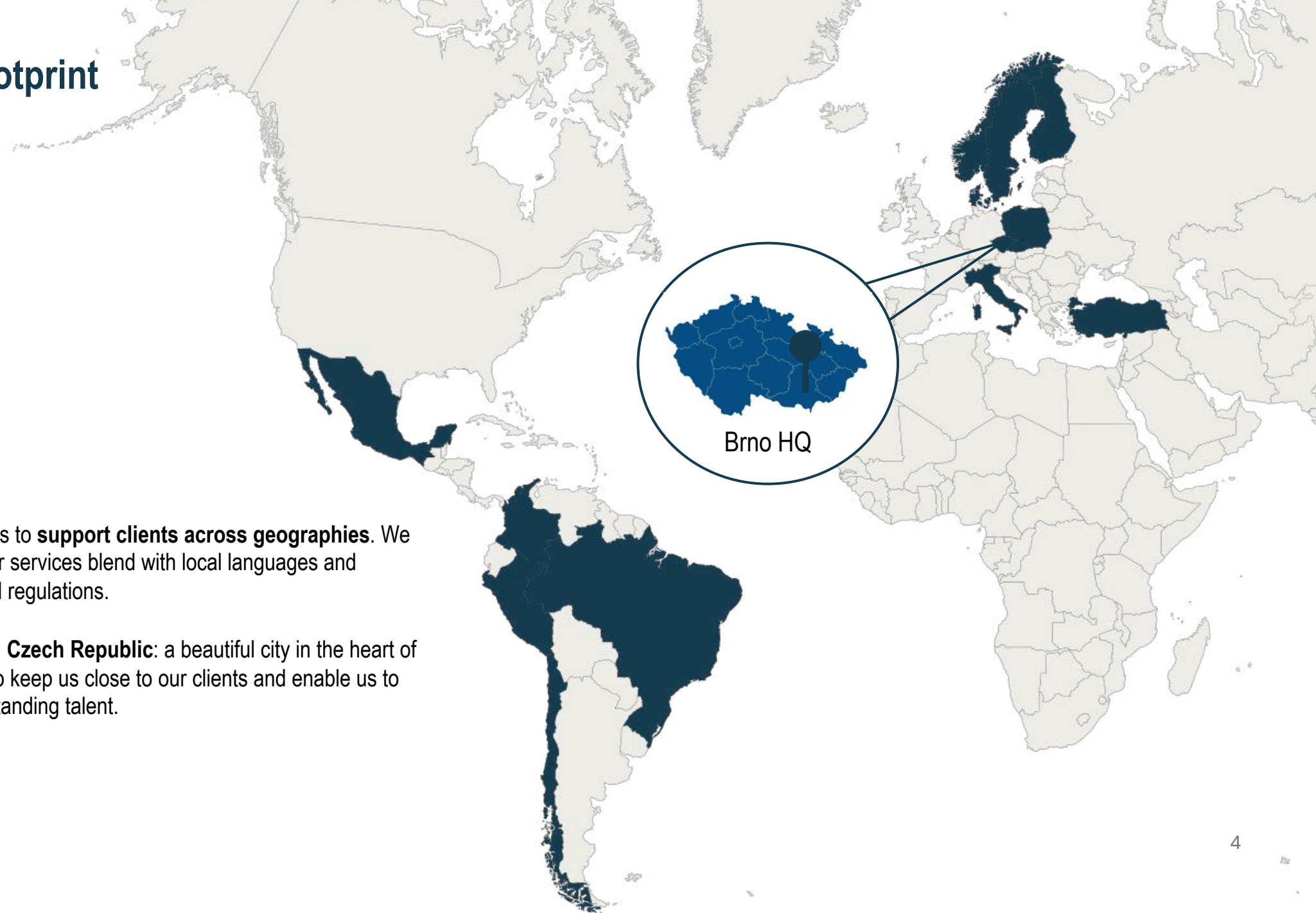
We operate with absolute discretion, acting as **trusted partners to executive teams** who rely on our guidance to execute critical business transformations.



## Hands-on Approach:

We collaborate directly with your teams, ensuring that strategies are not only formulated but also **executed seamlessly**, driving real, **tangible outcomes**.

## Geographical footprint



Our distributed model allows us to **support clients across geographies**. We take special care to ensure our services blend with local languages and cultures, and comply with local regulations.

Our headquarters are in **Brno, Czech Republic**: a beautiful city in the heart of Europe, strategically located to keep us close to our clients and enable us to strengthen our team with outstanding talent.

**“Integrity, commitment,  
impact. Our values are not  
hanging on the wall, but  
applied in everything we  
do as a team.”**

*Alessio Colantonio*  
*Chief Executive Officer*



# The value we bring

## REVENUE GROWTH

We don't just plan; **we execute**. From defining market entry strategies across EMEA to directly securing new business partnerships, **we deliver increased revenues** and tangible results.



## OPERATIONAL EFFICIENCY

By reengineering processes and coaching your teams in Project Delivery and ITSM practices, we improve workflows and reduce operational bottlenecks, **reducing time-waste and resource consumption**.

Pan-European Network

Regulated Industry Expertise

Digital Mastery

Risk Management Expertise

# THE CHALLENGES WE HELP YOU SOLVE

Revenue Stagnation,  
Operational Inefficiencies,  
Technological Debt,  
High cost of Compliance.

S&O Capital will tailor a custom solution for your organisation.

**“First we test if it should exist, then we make it better.”**

We do not pursue operational improvement for its own sake. Instead, we challenge the status quo where it matters most, using decades of delivery experience to uncover the real business need and implement targeted changes that deliver the greatest efficiency gains.

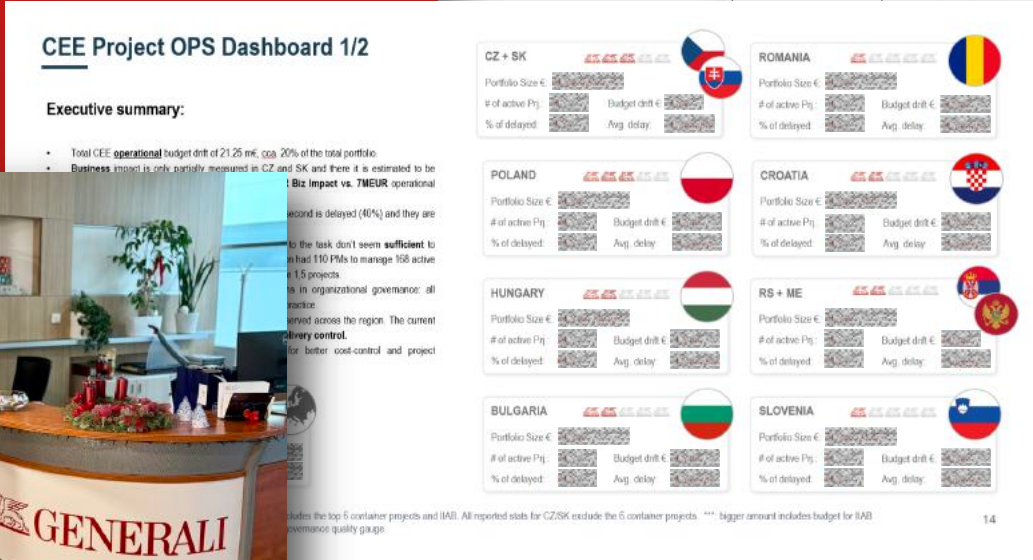
***Paolo Lamperti***

*Vice President – Global Delivery*



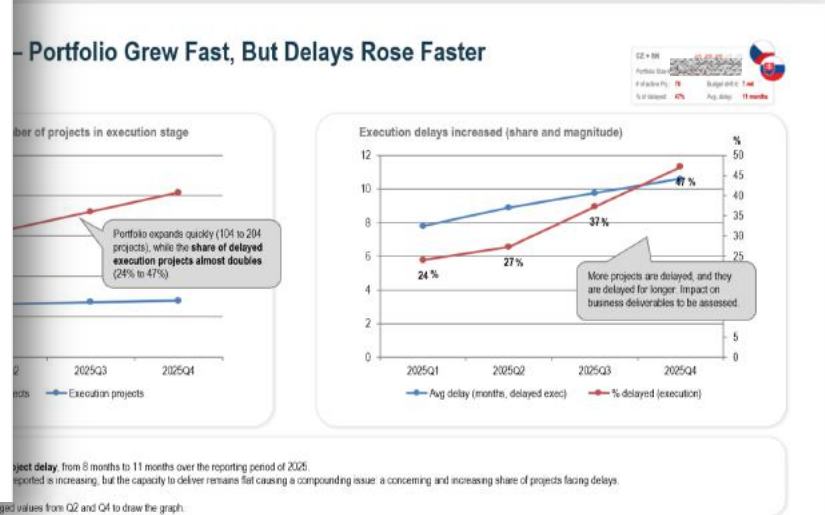
# Generali CEE: 20% improvement on project delivery portfolio across 8 Countries

With over 150 years of history, a presence in more than 50 countries, and a customer base exceeding 70 million, **Generali** are one of the world's leading insurance groups. In partnership with S&O Capital, Generali set out to improve **Project Management efficiency by 20% across 8 Countries in CEE: a delivery portfolio of hundreds of M€ in size**. The engagement also targeted a 20% improvement in Governance effectiveness and reducing ad hoc escalations, exceptions, and out of process decisions, as well as a 10% increase in Portfolio delivery predictability through increased adherence to budget and timelines.



### PROJECT'S MILESTONES

Milestone	Description	Key Deliverables
PMO Assessment Completion	Completion of the initial maturity, tool, and skill assessments, providing a consolidated overview of Overall C2 PMO performance and improvement priorities.	<ul style="list-style-type: none"> <li>PMO Maturity Report - detailed evaluation of PMO governance, processes and KPIs</li> <li>Skill Matrix &amp; Competence Heatmap - mapping of PM skill levels across portfolio</li> <li>Tool Audit Report - summary of tool usage, data accuracy</li> <li>Quick Wins - list of 5 short-term improvement actions</li> </ul>
Framework Deployment & Pilot Go-Live	Launch of the new PMO Operating Model, including delivery framework, governance cadence, and first pilot project execution under the new standards.	<ul style="list-style-type: none"> <li>Initial PMO Roadmap - prioritized improvement initiatives, timeline, and ownership</li> <li>PMO Operating Governance Model - documented structure, decision flow (RACI), meeting cadences, and escalation channels</li> <li>PMO Delivery Framework Deck - standardized templates (Project Charter, Plan, Risk Log, Status Report, Change Request Form, Closure Report)</li> <li>Governance Dashboard - first version of visual reporting on project performance, risks, and portfolio alignment</li> <li>On-the-Job Coaching - recorded coaching sessions, shadowing activities, and PM feedback</li> </ul>
Continuous Improvement Launch	Full activation of the PMO monitoring and review cycle, with dashboard-based performance tracking and institutionalized continuous improvement practices.	<ul style="list-style-type: none"> <li>PMO Performance Dashboard - report of PMO KPIs (efficiency, governance, predictability, cost savings)</li> <li>Quarterly Review Deck - standardized template with trend analysis, lessons learned, and improvement backlog</li> </ul>



# Lufthansa Group testimonial: 1.2 M€ savings in 7 months

Transporting over 100 million passengers annually, the **Lufthansa Group** is one of the largest players in aviation and transportation. With more than 115,000 employees and annual revenues exceeding €37 billion, the Group engaged S&O Capital to deliver a specific **OPEX efficiency target**: a goal we successfully achieved by optimising the ITSM processes of their international contact centre, Lufthansa InTouch.

**Client Testimonial:**

**Lufthansa**

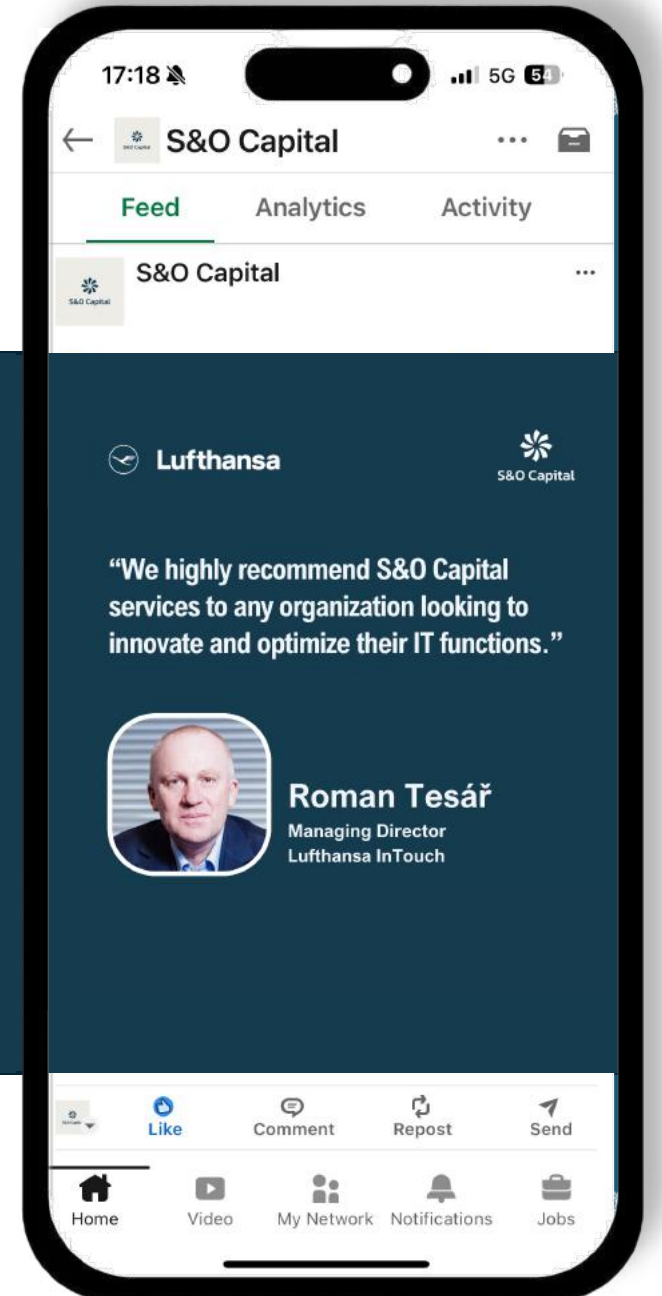
### Efficient OPEX reduction

Working with S&O Capital has been a **game-changer** for our IT Service Management. Their team of **senior experts** enabled us to adopt a more data-driven approach, leading to **significant efficiency gains** in our back office. Despite a limited timeframe, they ensured no disruption to our existing operations and applied a results-driven delivery model, easily replicable across locations.

### A data-driven approach

A key differentiating factor has been S&O Capital's ability to **approach our operational challenge from a business point of view**, using a data-driven approach to plan and execute with us an enhancement program that, in addition to operational benefits, has **increased the maturity of our internal team**.

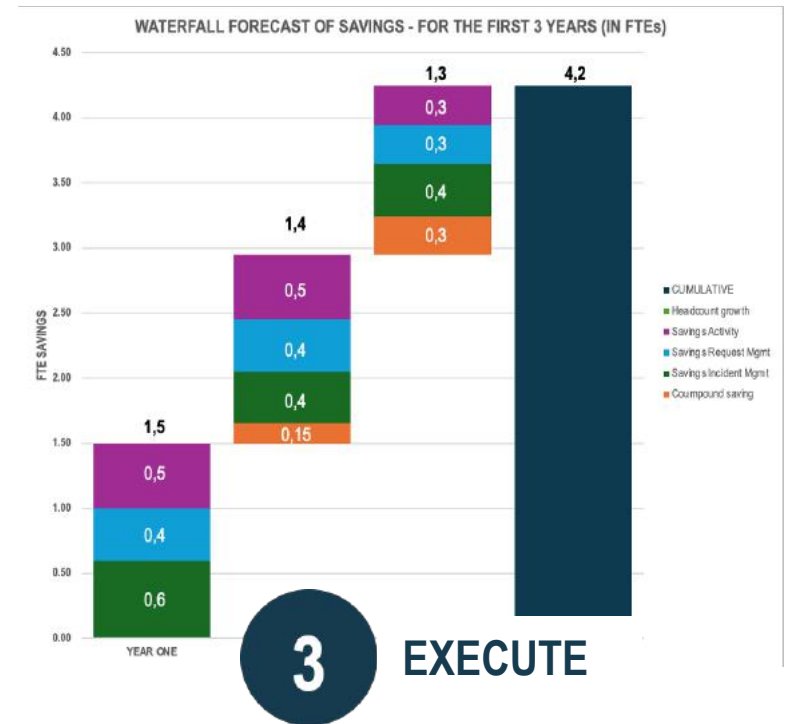
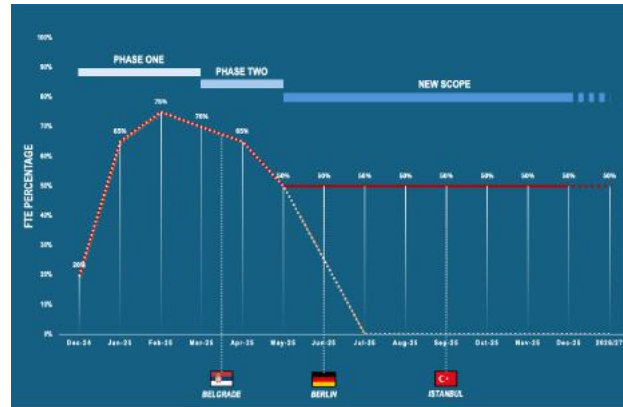
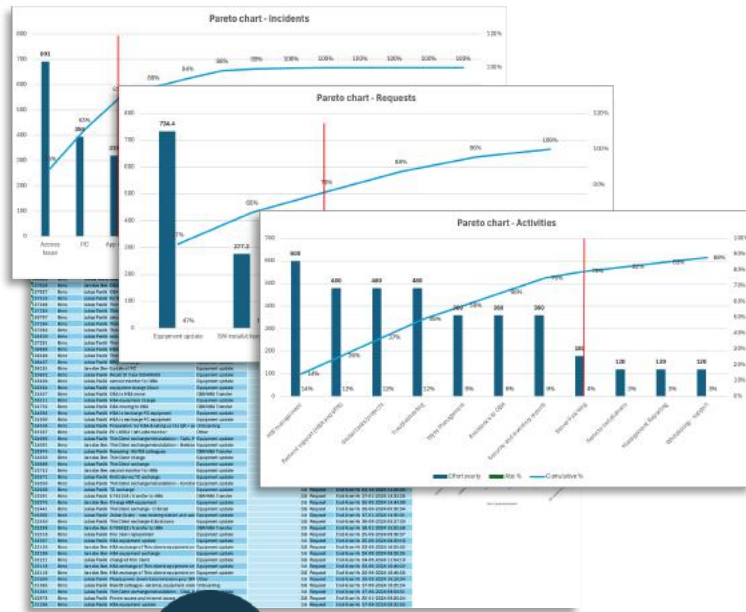
S&O Capital developed data-driven solutions that enhanced an already mature ITSM practice, driving **new levels of efficiency**, enabling **real-time access to business insights**, and creating room in the company's OPEX to **unlock growth**.



# Lufthansa Group Testimonial: overdelivering in OPEX Optimisation

The Lufthansa Group tasked S&O Capital to deliver 4 FTEs savings to their large operation centre in Czech Republic. The Group has recently acquired ITA (formerly Alitalia), the flagship carrier in Italy, and the centre in Czech Republic needed to create sufficient space in their OPEX to absorb new volumes.

Applying S&O Capital's methodology, we were able to quickly identify the areas for intervention, define a specific intervention plan and execute it. **The targeted OPEX reduction was of 1 MI. EUR in hard savings, to be realised within the same fiscal year. We exceeded targets delivering 1,2 MI. EUR.**



**1 ANALYSE**




**2 PLAN**

**3 EXECUTE**

# Leading European insurance subsidiary of Global Banking Group: Concrete Strategic Advisory

Serving approximately 80 million customers globally, our Client is a global leader in insurance and personal protection. With around 9,000 employees and generating over €36 billion in annual premium income, the company engaged S&O Capital to support their strategy definition, execution and implementation. Specifically, their NORDICS region commissioned specific support in the context of their 2025/2030 growth strategy.

\*: in compliance with NDA and commercial clauses



## Client testimonial:

Leading European insurance subsidiary of a Global Banking Group\*

### Clarity in communication

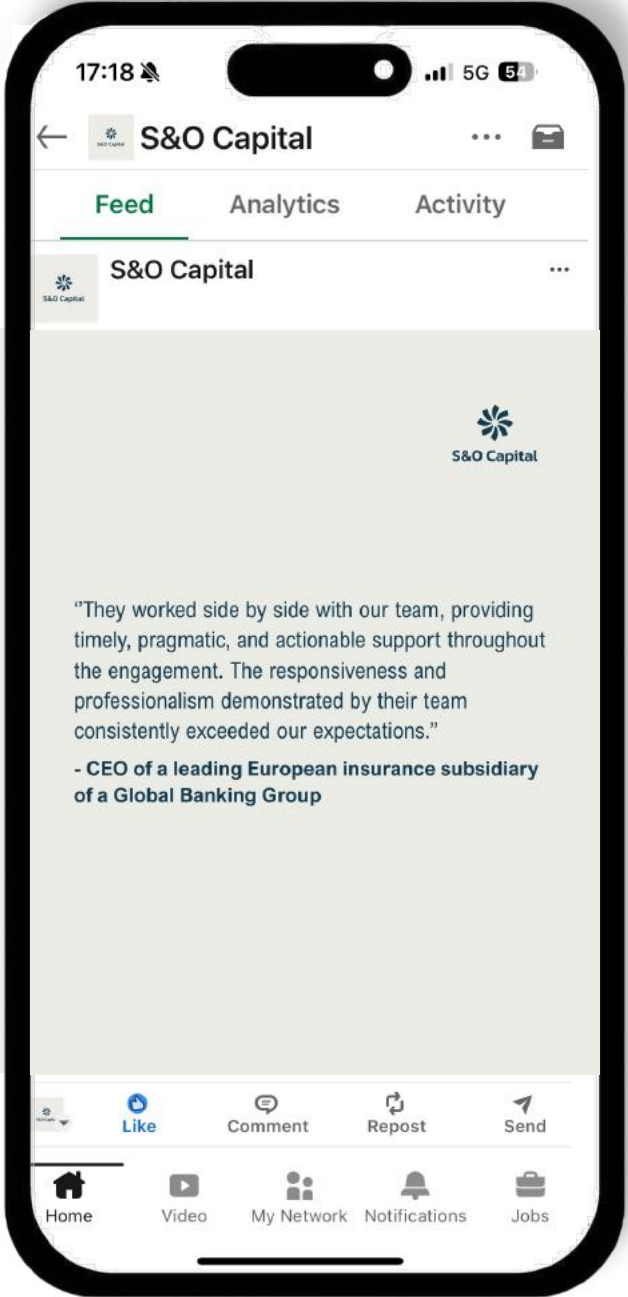
In early 2025, we engaged S&O Capital to support us in better **communication of our business strategy**, with a specific focus on investor relations. Their team played a key role in helping us **bring clarity** to our mission and develop a set of messages that communicate our value and direction effectively to shareholders and stakeholders.

### Delivery oriented

What set S&O Capital apart was not just the quality of their strategic input, but their **highly delivery-oriented approach**.

We are very pleased with the results of this collaboration and look forward to continuing our partnership with S&O Capital in the future.

S&O Capital was engaged through our transparent **retainer model**, which allowed the Client to secure flexible support as they navigated an ever-changing scope and shifting priorities.



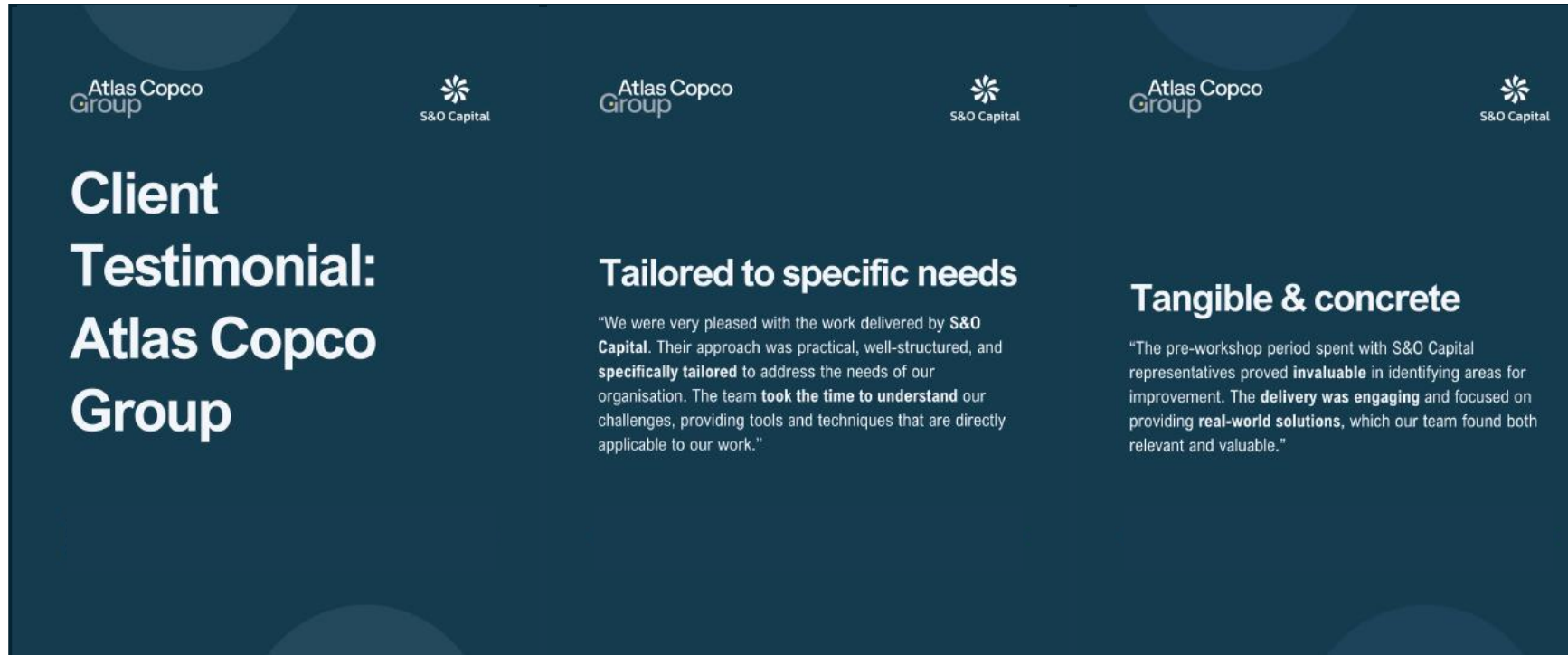
# Global banking group testimonial: Concrete Strategic Advisory

- Retainer-based engagement, mostly chosen because of:
  - Large scope of needed support and expertise
  - Low predictability of tasks and activities
  - Uncertainty of project duration
- Supported the Client on strategic decision-making and subsequent engagement with investors
- Not just advice: real, hands-on production of support materials and concrete deliverables.
- Topics ranging from "how to address low penetration rates on Creditor Protection Insurance products" to "how to reduce the time to market for micro-services based native apps".



# Atlas Copco Testimonial: Doubling Productivity of the PMO dept.

With over 50,000 employees worldwide and revenues exceeding €10 billion, the **Atlas Copco Group** is a global leader in Industrial Technology, with a strong European presence and a captive centre for F&A, R&D, and Technology located in the Czech Republic. They sought S&O Capital's expertise to **streamline processes** and **enhance project execution**.



**Client Testimonial: Atlas Copco Group**

**Tailored to specific needs**

"We were very pleased with the work delivered by **S&O Capital**. Their approach was practical, well-structured, and **specifically tailored** to address the needs of our organisation. The team **took the time to understand** our challenges, providing tools and techniques that are directly applicable to our work."

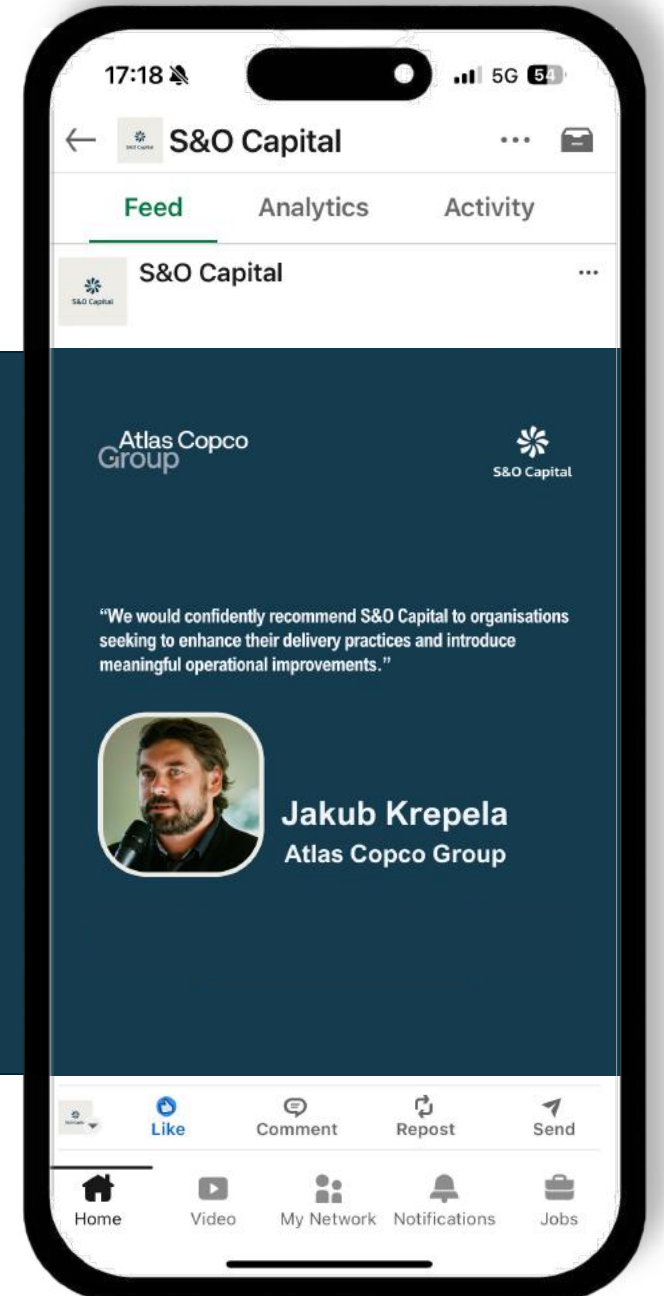
**Tangible & concrete**

"The pre-workshop period spent with S&O Capital representatives proved **invaluable** in identifying areas for improvement. The **delivery was engaging** and focused on providing **real-world solutions**, which our team found both relevant and valuable."

S&O Capital led the initiative, delivering **tailored, tangible solutions** that significantly improved outcomes, earning high praise from the client.



S&O Capital





# ENABLE YOUR TEAMS TO DO MORE WITH LESS +8,5M€

With S&O Capital's support, Atlas Copco's Project Management Organization significantly improved their project delivery capabilities, increasing project portfolio value by **€8,47 million YoY\*** through enhanced staff competencies, streamlined processes, and our hands-on execution.

\* Increase measured on the cumulative value of ongoing projects within the Company's portfolio, with less than 5% variation on team size.

# CLIENT SATISFACTION SCORE 96%

“ Tailored to our needs.”

“ [...] real action points to improve digital delivery”

“ [...] activity was aimed specifically at our company”

“Remarkable technical expertise, coupled with concrete and actionable advise.”

**“Technological innovation is not the goal, but a means to improving business performance.”**

Whether tackling legacy, reducing complexity, or driving innovation, we see technology as a means to an end. Enhanced business performance remains both the driver and the key measure of our specialised delivery.

***Massimiliano Orefice***

*Global Head of Technology*

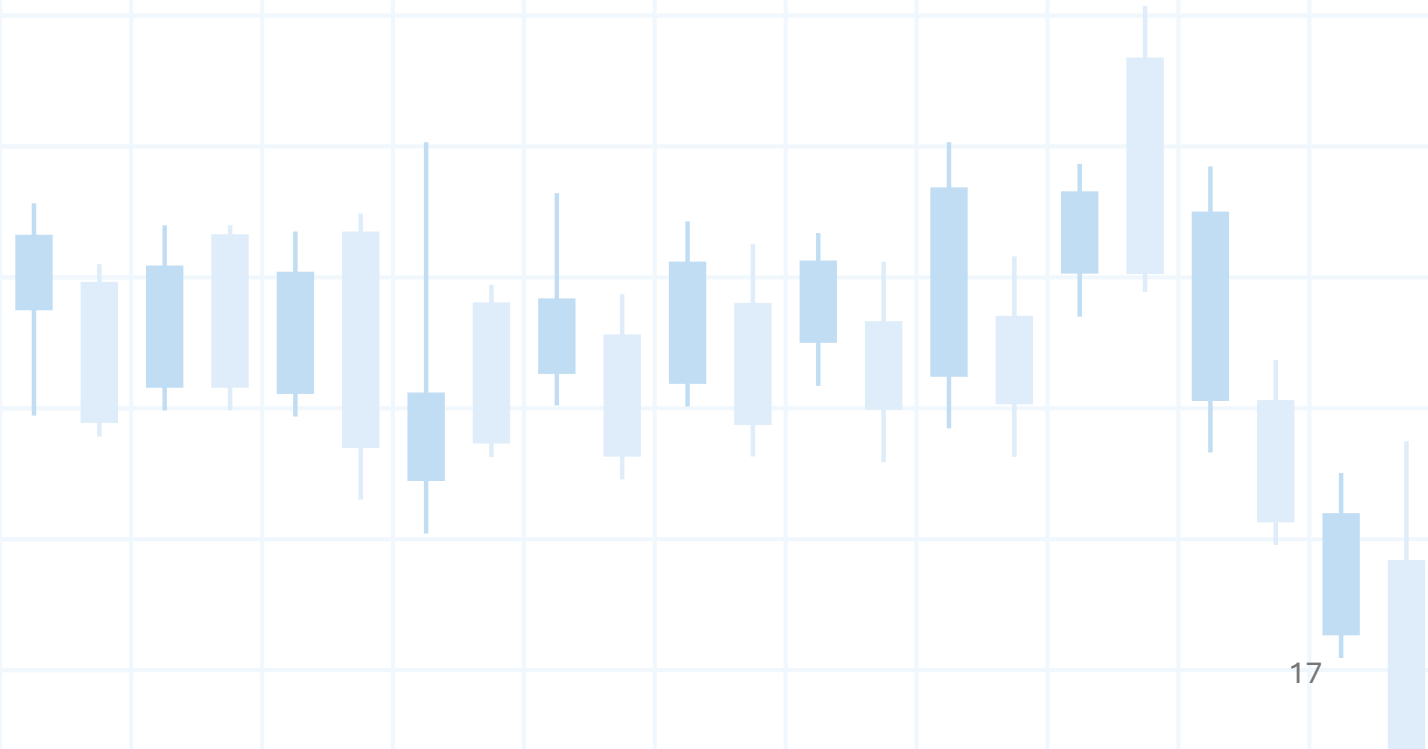


We stand behind our commitments

**Our commercials are tied to your success and concrete project milestones.**

Guided by our values, we have adopted a model that shares responsibility and reduces risk for our clients.

**Our fees are linked directly to delivery effectiveness and the value created,** ensuring full transparency, guaranteed outcomes, and alignment with our clients' priorities.



**“Quality is never a coincidence; it is the deliberate outcome of intelligent design, disciplined execution, and a relentless pursuit of improvement.”**

We don't leave excellence to chance. Every framework we design and every infrastructure we refine begins with a disciplined evaluation of purpose, compliance, and value creation. Through structured governance and targeted execution, we transform complexity into clarity, ensuring that quality is not only achieved but sustained.

***Levent Kececi***

*Global Head, IT Governance and Infrastructure*



# Why choose S&O Capital



**Elite, Senior-Only Teams:** S&O Capital's experts possess decades of hands-on experience. Our clients are supported by senior professionals from start to finish, ensuring the **highest level of expertise and execution** throughout.



**We stand behind our commitments:** Our business model ties our fees to measurable outcomes and specific project deliverables, ensuring full transparency and alignment with our Clients.



**Hands-On, Measurable Impact:** We do more than offer guidance and step away. Our specialists actively engage with your team to apply strategies that generate measurable outcomes. **We accompany you at every step, from planning to execution.**



**Exclusive Client Base:** By working with only a select group of clients, **we ensure focused, undivided attention.** This approach allows us to become true partners to our clients, providing deeper involvement and commitment than larger firms juggling numerous accounts.



**Rapid Execution, High-Quality Delivery:** Our lean teams enable **quicker decision-making and agile execution,** delivering premium-quality results—advantages that larger firms with cumbersome structures often cannot match.



**Specialists in Regulated Industries:** We are well-versed in the unique complexities and regulatory challenges faced while operating in regulated industries. We provide insights and strategies **specifically designed for high-stakes, heavily regulated environments.**



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