

# Project Summary – PE Owned SaaS Company

**Industry:** SaaS / Financial Management

**Project Type:** TSA Exit & Operating Model Shift

**Duration:** 6 months

**Role:** Engagement Manager

## Challenge:

Newly acquired firm operating under TSA with tight deadlines. Core systems, finance, and reporting were tangled with the seller. Risks included platform overlap, limited visibility, and operational drag.

## Approach:

- **Led** TSA execution and exit across IT, Finance, and Sales
- **Built** integration playbook (systems, processes, governance)
- **Aligned** financial, CRM, and reporting structures for separation
- **Set up** governance, issue escalation, and interim ops models

## Impact:

- ✓ Achieved operational independence on schedule
- ✓ Avoided TSA extension costs
- ✓ Reduced system overlap and manual effort by 30%
- ✓ Delivered stable post-close operating model
- ✓ Created reusable TSA framework adopted by other portcos

# Project Summary – Investment Bank Due Diligence

**Industry:** Technology / SaaS

**Engagement:** Pre-Go-To-Market Ops & Diligence Assessment

**Duration:** 12 Weeks

**Role:** Advisory Lead (Project-Based)

## Challenge

The bank needed pre-sale diligence on a SaaS target to assess scalability, maturity, and risk. Documentation was thin, financial processes were inconsistent, and investor confidence was at stake.

## Approach

Led full operational and financial readiness assessment  
Analyzed systems, vendor dependencies, and data security  
Interviewed execs to surface bottlenecks and execution gaps  
Evaluated revenue stability, churn exposure, and contracts  
Built a GTM readiness matrix and prioritized remediation plan

## Impact

- ✓ Identified key compliance and operational risks shaping deal terms
- ✓ Flagged \$1.2M in value erosion risks from deferred and hidden costs
- ✓ Delivered a maturity scorecard and 30/60/90 roadmap
- ✓ Equipped the bank with an investor-facing risk profile to drive decisions

# Project Summary – National Law Firm

**Industry:** Legal Services

**Engagement:** IT Ops Assessment & Risk Identification

**Duration:** 9 Weeks

**Role:** Advisory Lead

## Challenge

The firm faced growing operational and compliance risk due to aging infrastructure, poor visibility, and fragmented IT practices. Leadership lacked a clear view of maturity, vendor sprawl, and future readiness.

## Approach

- **Conducted** full-scale IT and infrastructure assessment across five domains
- **Interviewed** IT, finance, and legal ops to map system dependencies
- **Identified** legacy systems, unmonitored backups, and unmanaged endpoints
- **Scored** operational maturity and delivered a risk-ranked remediation plan

## Impact

- ✓ Uncovered \$750K+ in cost avoidance through vendor/tool consolidation
- ✓ Flagged critical systems without backup or recovery protocols
- ✓ Identified license non-compliance with financial exposure
- ✓ Delivered 30/60/90 roadmap to stabilize ops and guide future IT spend

# Project Summary – Mid Market SaaS

**Industry:** Tax Automation

**Engagement:** GTM & Sales Ops Transformation

**Duration:** 5 Months

**Role:** Embedded Strategic Advisor

## Challenge

Leadership needed to accelerate GTM maturity to hit growth targets and prepare for IPO readiness. Sales, marketing, and customer success operated in silos with unclear funnel ownership and inconsistent metrics.

## Approach

- Led cross-functional initiative to redesign the full Lead-to-Cash process
- Implemented ABM-aligned funnel with Salesforce integration
- Built forecasting and scoring models tied to buyer behavior
- Created unified GTM dashboard across marketing, sales, and retention

## Impact

- ✓ Increased pipeline visibility by 35%
- ✓ Reduced sales cycle time by 22%
- ✓ Improved forecast accuracy from  $\pm 35\%$  to  $\pm 10\%$  over 3 quarters
- ✓ Established scalable GTM cadence for sustained growth

# Project Summary – Global Media Company

**Industry:** Media & Publishing

**Engagement:** Single View of Customer (SVC) Transformation

**Duration:** 6 Months

**Role:** Program-Based Advisor

## Challenge

A PE-backed media company with 1,300+ magazines faced fragmented systems, manual workflows, and no unified CRM. Leadership lacked a consolidated view of publisher and advertiser relationships, slowing growth and increasing inefficiency.

## Approach

- **Facilitated** leadership workshops to define vision and outcomes
- **Mapped** lead-to-cash processes and advertiser/publisher journeys
- **Assessed** CRM requirements, ran build-vs-buy analysis, shortlisted vendors
- **Designed** initial product model and Customer 360 framework

## Impact

- ✓ Created unified roadmap for CRM and Customer 360
- ✓ Identified cost savings through system consolidation
- ✓ Improved publisher/advertiser visibility and experience
- ✓ Positioned BVM for scalable growth with integrated systems and data

# Project Summary – Field Services & Construction

**Industry:** Industrial Services / Infrastructure

**Engagement:** ERP Implementation & Compliance Ops Restructure

**Duration:** 6 Months

**Role:** Project-Based with Embedded Oversight

## Challenge

Post-acquisition growth outpaced operations. Systems were fragmented, compliance exposure was high, and siloed data created bottlenecks in finance, procurement, and field ops.

- **Approach Led** ERP implementation (Microsoft Dynamics) to unify finance, procurement, and HR workflows
- **Redesigned** compliance protocols to meet OSHA and DOT standards
- **Developed** playbooks for Procure-to-Pay, Hire-to-Retire, and Work Order-to-Invoice
- **Improved** cross-functional visibility through dashboards and automation

## Impact

- ✓ Built auditable ERP foundation across core ops
- ✓ Reduced OSHA recordables by 30% with improved compliance
- ✓ Shortened procurement cycle times, improved invoice accuracy
- ✓ Enabled leadership to monitor KPIs in real time

# Project Summary – National Environmental Solutions Company

**Industry:** Sustainable Waste / Environmental Services

**Engagement:** IT Procurement Transformation

**Duration:** 12 Months

**Role:** Embedded Strategic Advisor



## Challenge

PE-backed transformation required disciplined IT procurement and vendor management. Legacy contracts, siloed processes, and limited spend visibility created risk and inefficiency.



## Approach

- **Designed** category management and sourcing strategies
- **Standardized** Source-to-Pay governance and playbooks
- **Negotiated** MSAs/SOWs with key vendors (Tangoe, SHI, Genpact)
- **Implemented** vendor tiering, risk assessments, and KPI dashboards



## Impact

- ✓ Identified multi-million-dollar IT savings
- ✓ Improved procurement governance and compliance
- ✓ Reduced contract and renewal risk
- ✓ Built scalable procurement model aligned to PE value creation