

# Private Equity & Venture Capital

## Global PE Firm Headquartered in Switzerland

**4**  
years of partnership

**~\$10m**  
in cost savings

**+30**  
member dedicated  
desk of analysts

**5**  
client offices  
supported

### CLIENT CHALLENGES

A leading Swiss bulge-bracket asset manager was looking for an outsourcing partner to expand its investment team to cover more opportunities across US and European markets

- » The engagement began in 2008 with a team of 2 research analysts, scaling up to a team of 30 dedicated analysts in less than 3 years. Acuity Knowledge Partners has been in partnership with the client's PE FoF and Asset Management divisions since 2008
- The goal was to set up an offshore platform to support lean onshore teams globally, with the following key objectives:
  - Reducing high cost of external support from consulting firms – which was adversely impacting funds' management fees – by creating own dedicated offshore team working with fund managers
  - Reducing staff and management costs, as partnerships with consulting firms were project-based and most research tasks were still being managed internally; outsourcing partnership helped client control staffing and management efforts
  - Retaining key strengths in-house while offshoring standard analyses to free-up onshore bandwidth for deal sourcing and other high-value activities
- » Acuity Knowledge Partners developed specific skills to cover additional areas of support, thus becoming the de-facto hiring and support center for the client

### OUR APPROACH

- » Created standard methodologies to ensure consistent output and quality
- » Conducted a whiteboarding session to identify additional areas of support areas to expand the proposition
- » Operated as a central team to support over 5 client offices, thus increasing process and cost efficiency
- » Reduced due diligence/ turnaround time by 40%, thus enabling the client to increase its focus on high-value activities and newer geographies

### IMPACT DELIVERED

- » Aligned industry/ product teams to provide value-added support with strong integration
- » Ensured quick deployment of investible resources within a quick timeframe for fund marketing collaterals, target screening, deep dive industry/ market research, periodic reporting, and due diligence
- » Incorporated additional elements, such as portfolio revaluation, cash flow modeling, competitor analysis, and market updates
- » Transitioned to client's virtual environment, delivering stronger

#### About Acuity Knowledge Partners

Acuity Knowledge Partners, formerly part of Moody's Corporation, is a leading provider of bespoke research, analytics, staffing and technology solutions to the financial services sector.

Headquartered in London, Acuity Knowledge Partners has nearly two decades of transformation experience in servicing over 300 clients with a specialist workforce of over 2,500 analysts and delivery experts across its global delivery network.

We provide our clients with unique assistance not only to innovate, implement transformation programmes and increase operational efficiency, but also to manage costs and improve their top lines.

These services are supported by our proprietary suite of Business Excellence and Automation Tools (BEAT) that offer domain-specific contextual technology.

Acuity Knowledge Partners is assisted by Equistone Partners Europe, a leading private equity organisation that backs specialist growth businesses and management teams.