

# Private Equity Investment

## US-based Global Private Equity Firm

>8

years of partnership

~\$48bn

AUM supported

c.50%

time savings, to be redeployed on critical tasks

Complete ownership of portfolio monitoring

### CLIENT CHALLENGES

- » The client is a leading US-based PE firm investing globally. Our partnership with the client started in 2008, with 8 FTEs supporting 1 fund, which has now grown to 32 FTEs supporting 5 funds
- » A significant portion of the client's in-house resources were allocated to intensive research and analysis tasks, diluting its focus on critical and high-value tasks
- » The client also had aggressive deal sourcing and closure targets, but lacked bandwidth to rapidly scale up the investment process while continuing to closely monitor its existing portfolio of investments
- » High costs and lack of continuity associated with engaging consulting firms for diligence engagements drove the client to set up an offshore team that could undertake preliminary due-diligence on identified targets and also support its teams on portfolio turnaround initiatives

### OUR APPROACH

- » Understood the client's requirements, ranging from lowcomplex quick turnaround projects to high-complex multiweek assignments
- » Set up a team of 8 analysts with balanced skill sets across business and financial research
- » Developed templates and methodologies for conducting standard research tasks, in consultation with the client
- » Engaged with the client at multiple levels – project execution, team management and account management – to ensure smooth transition and alignment

### IMPACT DELIVERED

- » Set up a client-dedicated offshore team with a mandate to undertake rigorous research and analysis tasks, enabling the client to focus on deal execution
- » Staffed the offshore team with consultants hired from top-tier strategy consulting firms to provide valuable insights during due-diligence assignments
- » As a result, offshore team was well equipped to start contributing on complex diligence assignments from day one
- » Over time, the offshore team assumed full responsibility of portfolio performance monitoring and reporting

#### 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.