

## Eight Cross-Portfolio Accelerants

Ways to leverage opportunity across your entire Private Equity (PE) portfolio

1

Pi

Performance  
Indicators

### Visualize Cross-Portfolio Operational Performance

Line up operational performance across all current investments — starting with data normalization, key performance indicator (KPI) baselines tied to investment thesis, and standardized, easy-to-interpret operational performance dashboards for Board meetings, monthly Management reviews, and day-to-day progress checks. Cross-portfolio performance visibility provides a standardized scorecard for in-house Operating Partners to collaborate with Management, ensure your investment is progressing as planned, and helps your team to provide precise, timely support within investment partnerships by seeing operations across the entire portfolio. **Benefit | Timely, Informed Decisions**

2

ELL

Executive Lessons  
Learned

### Share Lessons Through A Peer-To-Peer Executive Conference

Get Management together to cross-pollinate promising ideas, share ways PE ownership boosts growth, and even allow peers to commiserate a bit on current challenges. This format provides a non-threatening environment for Management to learn from each other. Your Executive Partners will appreciate the introductions, learn from on-going discussions, and gain novel perspectives — directly from their peers. Most conferences have to be structured with initial introductions provided by PE Leadership. If there's value in the conversations, these peer-to-peer discussions will take on a life of their own and your PE team gets a glowing reputation as a strong connector thoughtfully supporting Management. **Benefit | Portfolio Management Inspiration**

3

Ms

Marketing & Sales

### Leverage Marketing Drivers and Sales Relationships

Comparing notes across the portfolio holds the potential to accelerate inbound and outbound lead generation, select investment-worthy marketing SaaS applications, share brand development expertise, and accelerate omni-channel content generation. For firms in similar industries or offering complementary products & services, looking for cross-selling opportunities within combined customer relationship management (CRM) platforms may uncover a hidden pool of new customers, connecting Sales with new referrals. There's also opportunity to professionalize Sales Teams with a Top Performer Archetype (TPA) model — supported by lean business development processes, practical sales metrics, data-driven prospecting, and sales effectiveness training. **Benefit | Increased Revenue**

4

Pmo

Project Management  
Office

### Manage Across Projects and Knowledge Bases

A cross-portfolio PMO reinforces project management discipline and prescribes your own PE collaboration approach spanning across varying timelines, deliverables, risk profiles, and resource allocations. Your own in-house PMO brings all the opportunities, collective wisdom, and risk-mitigating actions into one view. This structure also ensures only the most value-creating engagements see the light of day and all stakeholders (PE Leadership, Management, and Operating Partners) have full disclosure on progress toward investment thesis milestones and problems slowing the team down. A customized cross-portfolio PMO supports Management's productivity by providing sharable business templates and cutting out redundant activities, too. **Benefit | Disciplined Organizational Learning**

## Eight Cross-Portfolio Accelerants *continued*

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5

Sc

Supply Chain

### Optimize Supply Chain Functionality and Cost Base

Looking into shared spend categories is a worthy exercise. Portfolio firms may operate in divergent industries with unique go-to-market strategies, and yet, share a few common spend categories with cost savings potential from a strategic sourcing program. Other key supply chain components such as "make vs. buy" models, transportation & fleet management, warehousing & fulfillment protocols, and practical inventory controls could have some interesting common denominators across the portfolio. Most companies are looking to get the most out of their enterprise resource planning (ERP) systems, so, tighter collaboration could be a boon here, too. **Benefit | Cost Containment**

6

Ctp

Cross-Training  
Programs

### Extend the Reach of In-House Training Teams

Another collaboration avenue involves getting the most out of your in-house training teams and outside training partners by distributing *permissible* training media, opening up computer-based training access, and providing past reference materials to other teams now facing similar challenges. Training may focus on specific functional expertise such as software development skills, welding, or 3D printing rapid prototyping techniques. Perhaps, the teams could benefit from polishing up more generalized skills such as agile project management, talent performance coaching, or lean continuous improvement principles. There might even be cross-training advancements to be had by scheduling non-competing firms to see "a job well done" at another investment. **Benefit | Skills Proliferation**

7

Tm

Talent Management

### Push All Portfolio Firms Toward Talent Management Excellence

Perhaps, there's a chance to merge talent pools across the portfolio, broaden executive searches, and more quickly fill crucial open positions. Or, the spark may come by shoring up a firm's talent infrastructure by sharing highlights of successful onboarding programs, trade school and university partnership contacts, employee promotion & retention strategies, or even compensation structure benchmarking. Specific synergies and portfolio firm benefits will coalesce around the current level of sophistication a given Human Resources (HR) team possesses and where they need to progress to meet investment thesis expectations. **Benefit | Increased Productivity**

8

Nai

New Acquisition  
Integration

### Speed Up and Smooth Out Acquisition Integrations

Finally, Management can help each other out by sharing the highs and lows of assimilating a new business into a platform company. If your PE firm does not already have a formalized "Acquisition Playbook", help from other Management Partners speaking from experience provides building blocks to smoothing out the acquisition approach, staying ahead of problems, and accelerating integration tactics gleaned from collective past experience. Essential concerns like retaining a healthy company culture, keeping customers happy, and integrating a hodge-podge of technologies are always messier in execution than originally planned. Leveraging collective integration experiences can guard against getting lost in expensive rabbit holes. **Benefit | M&A Risk Reduction**