

Case Study **GROWTH EQUITY**

BUILDING SOLUTIONS FOR DEMONSTRATING IMPACT

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JOURNEY

GLOSSARY

STRATEGY BUILDER

The Strategy Builder tool uses data science to prioritize strategic initiatives based on which efforts will deliver the greatest desired impact to a business.

TEAM CHARTS

The Team Charts tool helps leadership remove ambiguity by creating a clear, visual accountability structure

WINS TRACKER

The Wins Tracker tool records critical milestones and proves long-term success

CONTEXT

We partnered with a growth equity group to systematize and scale their evaluation, implementation, and management of long-term growth strategies. This firm focuses on acquiring companies in the manufacturing and supply chain industries. These acquisitions often require internal reconciliation, presenting an immediate need to gain further insight into the alignment of the identity and values of prospects.

WHAT WE DID

We calibrated their Journey Strategic Platform to perfectly sync with their internal behaviors, completing their onboarding process within 60 days. Our shared goal was to provide a platform in which they could evaluate opportunities efficiently, design and manage a portfolio of strategic plans according to evaluation results, and accelerate growth.

IMPACT

Use of their platform accelerated data gathering and revolutionized the way this group identifies its opportunities. Our client to accelerate growth beyond their initial goal of six acquisitions a year.

CHALLENGE

With business streams ranging from an evaluation and strategic consultant engagement all the way to purchasing the entire entity, this team manages multiple relationships at varying stages simultaneously. Immediate pains felt were manual and time consuming due diligence, implementation, and management.

We were asked two main questions:

How can Operations and Management create impact by de-risking opportunities sooner?

Can we track how our process impacts overall ROI?

NEEDS:

**ACCELERATED DATA GATHERING
DE-RISK OPPORTUNITIES
DEMONSTRATE STRATEGIC IMPACT**

THEIR JOURNEY SOLUTION

We built the Journey Platform to help leadership understand how to precisely implement the change they envision. This requires removing issues with reporting, implementation, and measurement of ongoing strategies.

By amplifying the due diligence and onboarding processes, we were able to mitigate risk of opportunities, provide a strategy management tool, and deliver the ability to demonstrate and prove impact.

The platform provided improvement in three key areas:

1

Ability to measure an opportunity's team alignment and capacity for change before LOI

2

Created a standard for the firm to measure operational and behavioral processes against

3

Ability to demonstrate the impact of both implemented strategies and the acquisitions themselves

FEATURE 1

SCALABLE ASSESSMENTS

Behavioral assessments are key when understanding the current state of operational maturity within prospects. Because this data can be hard to quantify, pinpointing leadership values, identity and capacity alignment among prospective acquisitions can often be left until after the deal has been finalized.

These assessments allowed our client to:

- Identify opportunities earlier by uncovering behavioral alignment or lack there of earlier on in the due diligence process
- Validate and demonstrate “gut feeling” with objective, quantitative data within 3-4 hours
- Avoid behavioral pitfalls and wasted time on ill-fitting opportunities

Compare Manufacturing and Supply Chain Prospects

By uncovering the behaviors, philosophy and alignment of decision makers with qualitative data, our client was able to accelerate their due diligence process by 3x, identify opportunity earlier, and avoid wasted time.

Can they scale?

Understanding a company’s capacity to change, adapt, and grow, enabled the group to stop using resources on ill-fitting prospects and build applicable strategies for real opportunities instead.

FEATURE 2

STRATEGY BUILDER & TEAM CHART TOOLS

After streamlining the due diligence process, implementation and ongoing management of multiple strategies was our next focus.

With the Journey Strategic Platform, they now have a strategy builder to input, prioritize, and run various integration strategies across acquisitions and, given the behavioral assessments, can predict growth accordingly.

We provided a team chart tool to view leadership of various initiatives, track progress from afar, and have proof of the wins within each business.

Business Standard Created

Creating an organizational standard to measure against, they are now able to prioritize strategies with company goals, varying levels of maturity, and cultural differences in mind.

Operational Overview

With six acquisitions a year, this client needed insight into the management of various initiatives along with the ability to track how they affect on KPI's.

FEATURE 3

DEPARTMENTAL COMPARISONS and YEAR-OVER YEAR ANALYSIS

Finally, we unlocked features for ongoing management, post-close.

Now that teams had a full 360 of each opportunity and their own business standard to measure against, they needed a way to track incremental growth and an easy way to report back to investors.

With departmental comparisons and YOY analysis, leadership gains granular clarity into what is working and what isn't, enabling them to alter strategies accordingly.

Manage Ongoing Strategies

Six new businesses a year means integrating and managing a lot of efforts at once. Journey enables them to create, track and alter strategies across their own company or prospective and acquired businesses.

Demonstrate Impact

Proving financial and communal impact without data from before, during and after strategic implementation was a felt challenge. The creation of both a home for this data and a designated report generator provided leadership with a way to articulate specifics with ease.

WHAT THE CLIENT SAYS

"In the world of growth equity, we've got to move fast. We've got to create a growth strategy together and implement it quickly."

On the Assessments

"The assessments set us up for the onboarding process, **accelerate our due diligence process, and build trust** with our client from the onset. Those assessments are great for sourcing, for deciding if an opportunity is a good fit."

On Strategy Builder and Team Charts

"The first 90 days are really critical. These customizations, in particular, organize what we are going to do in finance, what we are going to do legally and operationally. **It integrates our strategy for growth on a tactical level.**"

On Comparisons & Year Over Year Analysis

"Being able to demonstrate the impact of their investments, means they're more likely to bet on the next one. **Three weeks into using the tool we were already seeing results we wanted to share with our investors.** They don't need to be in the weeds with us, but for them to one have source to log into and get the highlights, here's the strategy we're putting into place, here are the KPI's we are measuring, and here's where we are in the timeline is huge."

CONCLUSION

We partnered with a growth equity firm to see if we could help them identify opportunities that were right for them, implement growth plans quicker, and then report that back to investors. We can summarize these initiatives as follows:



STREAMLINE

- Simplify and modernize your onboarding processes.



RANK BASED ON IMPACT

- Have a tool that allows you to input strategies on your roadmap and prioritize based on the impact you need to generate.



ELEVATE INVESTOR EXPERIENCE

- Deliver cloud-based reporting that ties resource allocation to its affect on the business.

PARTNER WITH US

- * Access custom growth planning tools
- * Evaluate the operational and behavioral health of your business or a client's business
- * Uncover blindspots hindering leadership decision making and constraining ROI

SaaS tools for informed decision making.

Contact

Sales

Rusty Goodsell

615-406-8227

www.journeysystem.com

rustyg@neworchard.com