

We helped a Family Office rationalize cost of Marketing, Strategy and Research for all its directly invested portfolio companies

About Client

Client is a US based family office having direct investments in more than 20 companies across the globe. Portfolio management is client's responsibility

Client Situation

Client had directly invested in more than twenty companies of varying sizes; some as small as apps being developed to some mid-sized chemical businesses supplying to global Oil and Gas conglomerates. Being on the board of all these companies, client was looking for a single vendor who could bring consistency of quality for projects related to Marketing, Strategy, Fund-raise, Exits and M&A. Client also wanted to bring down the costs of having a separate research function in each of its portfolio companies and apply learning of one project done for any portfolio company to be applied to other portfolio companies

Our Solution

We set up a 3 member specialist offshore team to assist with the Research, Marketing and Strategy projects for all portfolio companies. We also set up a different centralized team for online and social media marketing. Typical projects that team handled:

- Finding out buyers of business/Exit opportunities
- Exit strategy
- Valuation comps
- Content marketing
- Product strategy
- Market strategy
- Lead generation
- Board meetings content preparation and support

Outcomes

- **90% savings in cost:** A centralized offshore team was established at one-tenth of the cost, that it would have required for client to even have a single member doing research work in each of its portfolio company onshore
- **Knowledge transfer between portfolio companies:** Learning from one project in any portfolio company could seamlessly be replicated for another portfolio company
- **70% reduction in cost of common functions:** A single team led to savings for common functions like publishing, editing, digital marketing and content
- **Multiple Exits over 5X RoI:** Our efforts led to 5X plus exits for multiple portfolio companies for the client