

Case example #3: We helped in the Operations / Value Creation team design for a Canadian institutional investor

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Situation

- Canadian Fund Co is an **institutional investor** with a global portfolio across industries
- Operations / Value Creation team is looking to **increase and formalize team involvement throughout deal lifecycle**, including how to build out the necessary resources to support the expanded vision
- Bain assisted Fund Co in **defining the role of the Operations / Value creation team in each stage of the investment lifecycle**



Results

- Developed **comprehensive view and high-level plan** for how to **execute the Operations / Value Creation's vision for operations involvement** across the investment lifecycle
- Achieved **alignment on approach to socialize the proposed changes** to Operations / Value Creation team roles **with the deal teams**



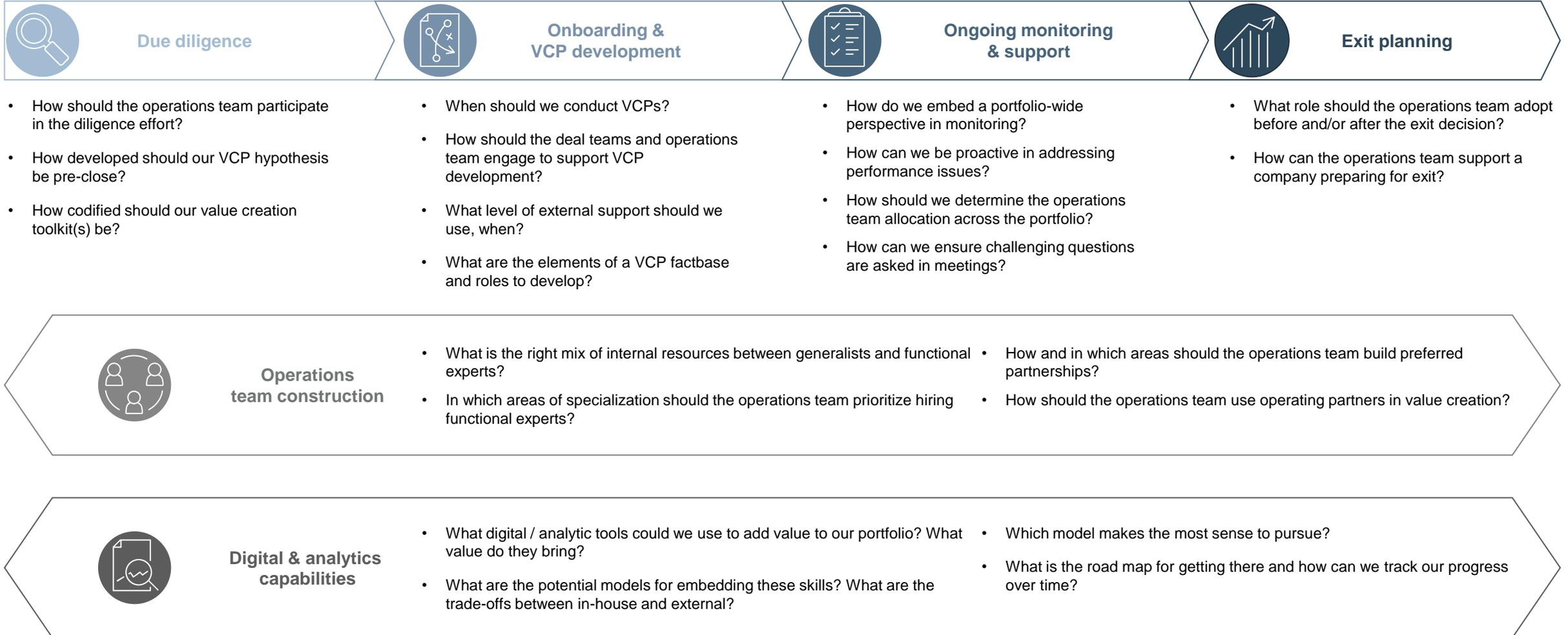
Approach

- Defined **archetypes and models for operations involvement in diligence, VCP development, VCP types, and post-decision exit process**, based on case studies of leading PE funds
- Defined a **high-level governance for ongoing monitoring**, including **defined forums, meeting cadence, and high-level meeting content**
- Co-developed the **vision for operations team role**, including determining appropriate archetypes and models, and identifying internal **examples of where the team involvement was positive or could be improved**
- Developed **materials to communicate proposed changes to the Operations team design** at the reference, summary, and executive levels

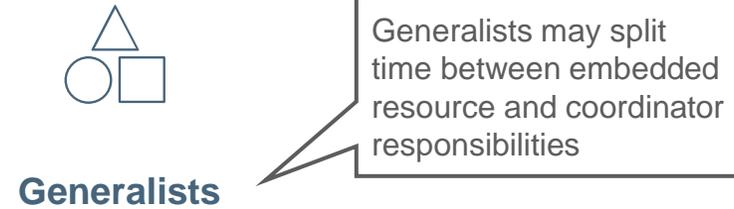


Case example #3: Through our lens on portfolio value creation, we addressed key questions throughout the deal lifecycle

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Case example #3: We recommended focus on generalist roles over functional experts based on team size and portfolio focus



	Embedded resource	Coordinator	Back-office	Front line
Role	<ul style="list-style-type: none"> Offer “boots on the ground” support to portfolio companies Advise or help develop value creation plans and actively engage with management to support execution 	<ul style="list-style-type: none"> Acts as enabling resource <ul style="list-style-type: none"> Advising companies and assisting deal teams (e.g., diligence, VCP follow-ups) Keeping “rolodex” and coordinating with external advisors/consultants Tracking best practices Supports holistic resource allocation decisions across the portfolio 	<ul style="list-style-type: none"> Supports the deal teams throughout the investment lifecycle with targeted support in functional areas of focus Typically integrated into broader value creation approach 	
Typical background	General management or consulting background, typically with line management/operating experience; may also have functional spike to complement existing team		Operating experience in relevant functional area (e.g., HR, IT), relevant to most/all portfolio companies	Operating experience in specialized functional area or industry (e.g., salesforce optimization, healthcare), relevant to some companies

Recommended approach