

# Case Study

**Need** Immediate strategy session facilitator

**Industry** Technology-software

**Business Type** B2B

## Challenge

A PE fund principal came to us with an immediate need for a strategy session facilitator for their software portfolio company. Having recently acquired the business, the fund wanted to quickly get the portco into strategy sessions so that they could start defining long-term goals. Needing structure for these sessions, they were looking for a facilitator that was a former executive or management consultant and had software industry experience. They immediately needed someone to remotely lead the session and help the portco form and prioritize goals.

## Solution

Leveraging our founder's 20 years in private equity, we have extensive frameworks for assessing PE-grade strategic plan facilitation needs. BluWave utilizes technology, data, and human ingenuity to pre-map, assess, monitor, and maintain deep pools of strategic plan facilitators that uniquely meet the private equity standard. We interviewed the PE fund to understand their specific key criteria, and then connected the client with two select pre-vetted facilitators from our invitation-only Intelligent Network that fit their exacting needs.

## Result

Within 24 hours of the initial scoping call, the PE firm and portfolio company were introduced to two PE-grade strategic plan facilitators that had software and prior executive/management consulting experience. The client selected their ideal choice. The PE fund was able to confidently hold a strategy session for their portco that was expertly structured and facilitated, leading to clear and defined long-term goals for the company.

We connected them with an operating partner that had deep experience leading facilitation events. They were so pleased with this consultant that they have continued to utilize him for similar sessions across more of their portcos.

- BluWave's Consulting Manager