



THE
POIRIER
GROUP

Case Study

OPERATIONAL COST REDUCTION FOR INVESTMENT MANAGEMENT FIRM

Company Background

The client specializes in credit and opportunistic investments, including financing and restructuring solutions for mature private equity funds. They were struggling to achieve positive margins due to high operational costs, slow decision making, and non-value-add activity.

Benefits

\$1M

found in annual
direct savings

PROBLEM



The firm operated under a 'cater-to-crisis' approach with a high degree of ad-hoc requests, lack of consistency in reports and data sources, a lot of duplication and replication of work, and limited use of technological solutions to support growth. Executives were focusing on the day-to-day operations and not planning strategically. TPG was **engaged to improve their day-to-day operations while creating strategic alignment for their long-term goals.**

APPROACH



- **Back office Optimization** – Overhauled middle and back-office accountability and processes (i.e. paperwork, clearing transactions, managing partnerships and third-party investment parties)
- **Process Streamlining** – Eliminated non-value-added processes and increased cross-functional decision making to find and implement cost-saving opportunities
- **Cost Allocation Overview**
- **IT Evaluation** – Recommended tools to promote execution speed and drive accountability and transparency
- Created executive alignment with clear roles and responsibilities