

HOW INVESTORS ESTABLISH SUCCESSFUL PARTNERSHIPS

If you're an investor working to secure successful partnerships with top-tier portfolio companies, it's important to differentiate your firm from the other firms in the market. Great investors differentiate their firms by providing both financial and transformational capital. For investors to establish a successful partnership, it's critical to align a portfolio company's needs with the transformation capital their firm can provide. Profitable investors understand this.

Aligning Critical Needs

Alignment starts with a strong partnership between investors and their portfolio equity holders. Early in the relationship, investors bring value by uncovering the transformational requirements of the portfolio company, in order to scale beyond capital. Aligning the operational needs of the portfolio company with the complementary capabilities of the investor builds a strong partnership and creates new opportunities for growth. Investors provide critical value by:

1. **Uncovering transformational needs** - understanding what resources beyond capital companies need to scale
2. **Positioning Value** - aligning their firm's benefits and experience to the company's transactional and transformational needs
3. **Determining the keys to a successful partnership** - laying the groundwork for what's needed from both parties to deliver value in the right time period

Portfolio Companies - Keys to Successful Partnerships

Strategic investors take a deeper dive into why portfolio company leaders are looking to realize value, then align their firm's strengths to the company's transactional and transformational needs. Portfolio companies look for an investor partner who can provide:

1. **Guidance and expertise** - to achieve a liquidity event in a appropriate time frame
2. **Access to capital and resources** - to create on-going growth and scale
3. **A strong reputation of success** - to partner with a firm that has successfully driven revenue growth and scale with other portfolio companies who have faced similar growth challenges

Investor Firms - Keys to Successful Partnerships

Successful partnerships for investors start with identifying portfolio companies that need support in areas where their firm can provide the capabilities necessary to achieve consistent growth. Three things they look for to ensure this success are:

1. **Company-wide visibility** - the opportunity to uncover and consult on complex challenges quickly to drive ROI
2. **Complementary Capabilities** - the opportunity to match investor skills and capabilities with foundational gaps in the portfolio company's growth plan
3. **Opportunity to influence structures/processes** - the ability to equip portfolio companies with the foundation and discipline that fuels predictable revenue growth

Maintain Successful Partnerships

Investors have the unique opportunity to assess the complex challenges that may hinder a company's growth. They've likely helped other portfolio companies navigate growth through similar challenges. That experience gives investors the ability to define priorities and leverage their expertise and operational partnerships to provide the right combination of capital and consulting. Where investor firms find the greatest value is when they can leverage their consulting capabilities across their entire portfolio to optimize time to realization, no matter the growth stage.

ENABLE SCALABLE GROWTH ACROSS YOUR PORTFOLIO

Secure successful partnerships and support portfolio revenue targets consistently in every stage of growth.

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