

# Value creating solutions for Private Equity companies

## Partnering for value creation

We know as a Private Equity firm you face a complex set of challenges, from accessing centralised, accurate and timely reporting across your portfolio to prioritising digital transformation projects that create rapid value for the companies you invest in.

Imagine a world where you can access a single integrated platform to analyse data, drive insights and monitor progress across your portfolio. A world where your trusted technology partner works with you to identify portfolio companies that could benefit from 'speed to value' solutions, providing rapid return on investment & ensuring you reach your exit goals faster?

At Xpedition, we are helping businesses achieve this today. Underpinned by Microsoft Dynamics 365, Power Platform and the Azure Data Platform, we can help guide you and your portfolio companies to prioritise and implement value creating solutions, aligned to your goals from investment to exit.

**"Microsoft is partnering with Xpedition to ensure that Private Equity firms can help the portfolio companies they work with digitally transform and innovate on the cloud. Being a key Dynamics 365 Co-sell partner in Microsoft's Private Equity programme, Xpedition will ensure that firms and their portfolio companies can maximize their use of Microsoft Dynamics 365 & Power Platform, enabling them to create value, reduce costs and drive sustainable growth."**

Marie Aberly, Microsoft Business Group Director.

### You're in safe hands

- 20 years as a Microsoft Gold Partner with extensive experience in Private Equity.
- Experience helping companies align their technology roadmap with their North Star.
- A broad portfolio of solutions and services to support you and your portfolio at each stage of the PE lifecycle from investment to exit.
- A blended agile and collaborative approach to projects supporting rapid time to value & gaining stakeholder buy-in.
- A single partner for all your needs - we can help you to prioritise your investment internally and across your portfolio.

## Partnering to create value across your portfolio

### 1 Explore

Critical to the success of any initiative is having a structured set of steps to envision and plan for business transformation. Our funded ideation workshops are built on proven concepts from Boston Consulting Group, Harvard Business School and McKinsey

### 2 Plan your route

Whether it is migration planning or access to funded assessments for Data readiness or cloud migration, we partner with you and your portfolio companies, identifying the scope of any project, investment and outcomes upfront.

### 3 Visualise

For your complete peace of mind we will collaborate to develop a design prototype, or subject to criteria, a full proof of concept, to test and evaluate any solution before committing to a transformation project

### 4 Embark

Both you and your portfolio companies need to flex and adapt in response to a rapidly changing business landscape. Our unique collaborative and blended agile project approach enables flexibility and rapid time to value, building resiliency and mitigating risk to business continuity.

# Value creating solutions

## Unlock the Power of your data

Data governance and compliance are key issues for any company. We can help you and your portfolio companies to realise data as an asset and become a data driven business. We take companies on a journey from data quality and strategy to a single unified data platform, providing them with the structure to leverage predictive analytics, insights and next best actions, utilising AI and machine learning. By employing self-service analytics we can work with you to create a holistic overview of data across your entire portfolio.

## Take control of Finances

We can help you and your portfolio companies get real-time visibility of their financial performance, connecting data across all areas of their business to inform business decisions, automating processes, reducing costs and accelerating financial reporting in one cloud-based solution.

## Achieve operational excellence

Your portfolio companies can achieve increased efficiencies and faster time to market by automating and streamlining their business processes. We help them manage their financials, sales, marketing projects and operations all from within one single cloud-based application. The best part is it will grow as they grow, leveraging your investment aligned with exit strategies.

## Activate Digital Selling

Our solutions empower your portfolio companies to gain a deeper understanding of their customers and build stronger relationships, accelerating deals and increasing wins through next best actions, aligning sales and marketing processes to reduce costs and helping teams adapt to a changing environment.

## Build agile business processes

Building agile business processes empowers business users to be more productive and efficient and help to stay agile and competitive in a rapidly changing environment. The Power Platform can enable companies in your portfolio to create their own apps. We can advise on best practice and centralised governance, whilst they build low code apps or we can build these for them.

## Enable always-on Service

We empower teams within a business to drive personalised, meaningful interactions with their customers and provide an unparalleled degree of support anywhere, anytime. We will work with your portfolio companies to tailor a solution that enables their business to scale operations & optimise resources, to deliver exceptional customer experience.

## Benefits tailored for you



Pre-negotiated discounting for qualifying portfolio companies across Microsoft's cloud offering.



Potential for funded Envisioning Workshops



Access to funded solution assessments (Data Platform Readiness Assessments, Infrastructure Migration, and Business Applications Modernisation)



Preferential Xpedition rates for PE-backed companies



**20 years**  
As a Gold  
Dynamics Partner



**570+ years**  
Product  
Experience



**630+**  
Dynamics  
Projects



**60**  
Dynamics  
Professionals



Microsoft  
Partner  


Microsoft Dynamics  
Financial Services Partner  
Microsoft Dynamics  
Service Industries Partner

Gold Cloud Business Applications  
Gold Application Development  
Gold Enterprise Resource Planning  
Gold Data Analytics

**Book a discovery meeting with our PE experts today**

To learn more about Xpedition, visit:

**xpedition.co.uk**

Or contact us on

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