

Grow and Protect the Value of Your Portfolio

Consulting Services for Private Equity Investors



Unfiltered Consulting

We don't sugar-coat it. We quickly identify the real problems and give you honest direction on how to fix them. No spin.



Uncompromised Results

We do it right. We deliver real results with integrity to give you full confidence that things were done right. No fuzzy math.

Focus Areas to Optimize Your Private Equity Portfolio



Increase Your Revenue

We are experts in business efficiency and optimization to improve your profitability.



Reduce Your Costs

We identify broken processes that are costing you resources and money.



Protect Your Capital

Whether a turn-around or a prep-for-sale, we can help you ensure maximum ROI.

Convoko Consulting Core Competencies

Sales

Grow sales effectively. Secure greater customer wallet-share. Realign sales teams to perform and drive product and services sales.

Convoko delivers:

- Pipeline management
- Market share evaluations
- Revenue generation plans
- eCommerce plans

Sales Operations

Shorten the order to cash cycle. Maximize account profitability. Implement sustainable structures to retain customer base.

Convoko implements:

- Sales commission plan
- B2B support plans
- SFDC/CRM integration
- Customer support plans

Marketing

Convoko provides executive-level marketing support services, providing CMO leadership on demand.

Convoko manages:

- Market analysis
- Market segmentation
- IR/PR program
- Lead gen programs

Business Intelligence

Use actionable business intelligence to drive positive revenue growth and cost management within your portfolio companies.

Convoko implements:

- Data mining programs
- Actionable score cards
- KPI standards
- Big Data solutions

Convoko. Bringing [simplicity](#) and [efficiency](#) to your private equity portfolio.

Key Value Levers

Playbook Program Definition

Revenue	Increase Share	<ul style="list-style-type: none">• Drive share of wallet and customer penetration• Implement corporate accounts selling platform• Gain new customers with enhanced value platform
	Improve Sales Model	<ul style="list-style-type: none">• Implement pipeline management and value selling program• Implement inside sales and customer care model• Leverage compensation model
	Improve Price and Margin	<ul style="list-style-type: none">• Implement quote improvements program• Leverage buying power• improve costs through scale
Cost	Improve Profitability	<ul style="list-style-type: none">• Improve order dynamics and profitability• Implement customer profitability program
	Reduce CRM Costs	<ul style="list-style-type: none">• Improve CRM contract spend• Rationalize solutions
	Reduce SG&A	<ul style="list-style-type: none">• Rationalize sales models, IT operating models• Conduct productivity improvement program• Implement Marketing and IT back-office shared service models
Capital	Reduce Receivables	<ul style="list-style-type: none">• Implement integrated S&OP optimization program• Implement receivables improvement program
	Reduce Inventory	<ul style="list-style-type: none">• Implement inventory optimization program• Implement logistics management program

Convoko focuses on increasing revenue opportunities, managing and reducing operational costs and maximizing the value of capital of your portfolio companies. We optimize your sales, sales operations and marketing teams, their processes and tools – done fast and done right.

We quickly identify and solve complex business problems, optimize the performance of, and protect the value of your portfolio asset.

Get More ROI from Your PE Portfolio

Our methodology is proven. Our approach efficient.

In days, not months, we can assess the current status of a company and then deliver an actionable roadmap for success to turn-around or prepare your asset for growth and eventual sale. To learn more, about how to get the most out of your PE and VC investment portfolio, please visit our [solutions page](#).



Convoko is a proud member of the EFA network of Associates.



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We can help your business

Convoko serves the diverse market of companies who need help optimizing their business operations to become more productive and more profitable.

Contact us today to learn more about what we can do for you.

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