

Board & Investor Reporting Enhancement

VIP SOLUTIONS CASE STUDY

VIP

BACKGROUND

Our Private Equity sponsor wanted consistent formatting, content, and structure from their portfolio's board and investor reporting. Their portfolio's management teams provided inconsistent and under-sophisticated materials, leaving heavy burdens on the private equity to prepare content for board and investor consumption.

OBJECTIVES



Develop standardized objectives for three-party communication (Board, Investor, Management Team)



Implement format of consistent slides, tables, and charts to enhance trust with audiences



Identify consistent, reliable data sources to inform content



Identify realizable timelines for consistent content preparation



Train portfolio companies to prepare decks that deliver consistent and timely reporting

SOLUTIONS



Developed standardized content across multiple portfolio companies, tying together strategy, execution planning, performance, and health



Implemented consistent, reliable reporting to meet three-party needs



Trained staff to maintain consistent and timely reporting

Private Equity
INDUSTRY

10
EMPLOYEES

\$35M
ANNUAL
REVENUE

Consistent, reliable reporting helped our client
ENHANCE CREDIBILITY WITH INVESTORS
and inform their decision making on asset trajectories.

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EXAMPLE BOARD REPORT TABLE OF CONTENTS

This table of contents outlines the standardized and consistent pieces of content included in the PE sponsor's board reporting decks. Our team trained the PE's portfolio company leaders to utilize this format for all reporting decks.

Board Reporting Preparation

Purpose	Deck Slide	Commentary
STRATEGY What are our lifecycle Goals?	Value Enhancement Plan	3-5-year plan outlining the longer initiatives that will get us to the value proposition we are looking for from this investment
EXECUTION What are we doing to meet our goals?	Operational Activities	Outlining a plan to achieve 90/120/365-day goals and the drivers tell us how we are progressing towards those short-term objectives
PERFORMANCE MEASUREMENT What does the data tell us? Do performance level indicators support our ability to achieve the goals?	Key Sales Performance Indicators	Highly visible metrics that show the biggest drivers of performance
	Key Product Cost Performance Indicators	Highly visible metrics that show the biggest drivers of performance
	Income Statement Vs. Budget & Prior Year Analysis	Summary level of financial performance relative to ratified budgets.
	Summary YTD Income Statement	Summary comparative reporting using current performance vs benchmarks utilized in assuming acquisition value.
HEALTH Do we have the capital and cash flow to support our goal pursuit?	Balance Sheet and Cash Flow Reporting	Asset, Liability, Cash visibility

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