

Core BTS is a technology solutions and managed services provider in the network, collaboration, data center, Microsoft and InfoSec markets. Core BTS is Private Equity owned and the platform acquisition of a new investment portfolio with a plan to scale quickly and sell within 5 years.

CEO - "The best M&A integration plan I've ever seen"

CFO - "Turning Point was critical in growing our business"

Desired Outcomes

Build out a platform for a new PE investment portfolio. Core BTS seeks 3X revenue growth, 40% EBITDA growth, create operating leverage, and deploy a scalable technology portfolio to rapidly grow business organically and through M&A.

TPC Approach & Solutions

- Value stream mapping of current and future state processes to establish standard Sales, Pro-Services, and Back-Office operations
- Turning Point Consulting Software Selection & System Implementation Methodologies for ERP, Service and Reporting systems
- Deployed new Service, Sales, Financial & Reporting systems
- Turning Point Consulting M&A due-diligence/integration methodology.
- Project and Program Management
- Business Analyst support and Data Migration Lead Developer

Success Results

- Created operating leverage through successful business systems deployment and process changes
- New operating model enabled rapid integration of four acquired companies, the last one taking only 45 days
- Navigated the company through enormous change and recategorization of products and services
- Created Sales Dashboards that enabled the sales team to grow revenue

PROJECT

- Integrated Plans
- Core Team Leadership
- Led Steering Committee
- Reporting
- Communication

PURPOSE

- Assessment, Strategy & Investment Roadmaps
- Due-diligence

PEOPLE

- Fractional Leadership
- Change Mgmt. Leadership

PROCESS

- Current & Future State
- Process Transformation
- Continuous Improvement

PLATFORMS

- Strategy & Roadmaps
- Requirements
- Systems Selections
- Integrator Selections
- Contract Negotiation
- NetSuite Financials Deployment
- NetSuite OpenAir Deployment
- ServiceNow Deployment
- Salesforce CPQ Deployment
- Avalara Deployment
- Logicmonitor Deployment
- MS PowerBI Deployment



Final Outcome Update:

PE Group successfully sold Core BTS for a high valuation to a strategic buyer.

Exceptional Outcomes. Delivered.