

bluemargin



vcp accelerator

our team

consulting team | project management office | data visualization team | data architecture team



Gold
Microsoft
Partner



gold competencies:

- data analytics
- data platform
- cloud platform
- project / portfolio management
- application integration



our experience

250+
clients

5
target verticals

11+
years

manufacturing | distribution | commercial services

SaaS | private healthcare



blue margin's vcp accelerator

Blue Margin quickly surfaces the right numbers to the right people to drive company-wide accountability to the VCP

Primary Challenges in PE:

#1: Aligning with the Management Team on the VCP

Blue Margin partners with portfolio companies to create top-of-mind awareness and accountability to the KPIs that define value creation

#2: Operationalizing the VCP Day-1

The VCP accelerator starts with an OKR dashboard to quickly put key metrics into practice and establish the roadmap to data-driven

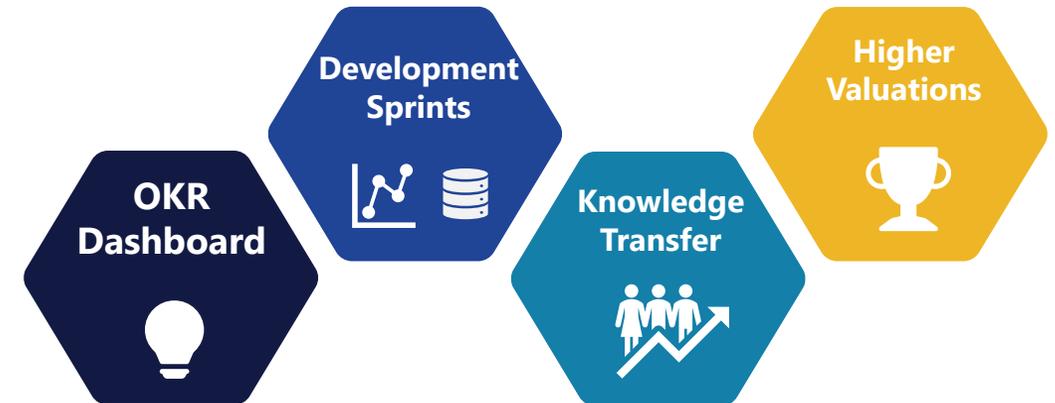
#3: Building a Culture of Accountability and Growth, Fast

BMI's best-practice industry metrics and dashboards accelerate dashboard deployment across finance, sales, and operations

#4: Maximizing Return on Investment

BI is an add-back investment that turns data into an enterprise class Data Platform and an empirical narrative to support higher valuations

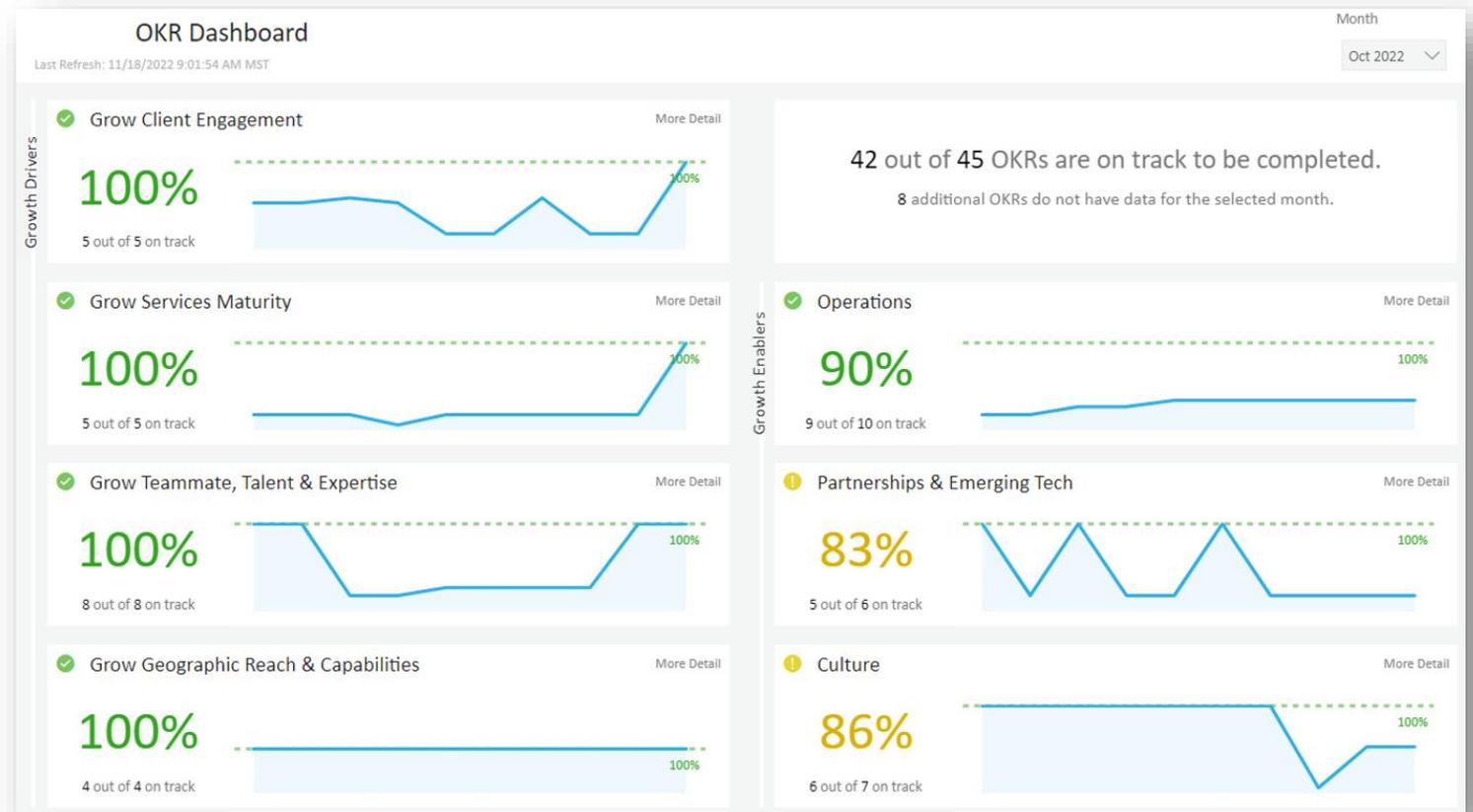
The VCP accelerator process:





phase one – rapid-deployment company scorecard

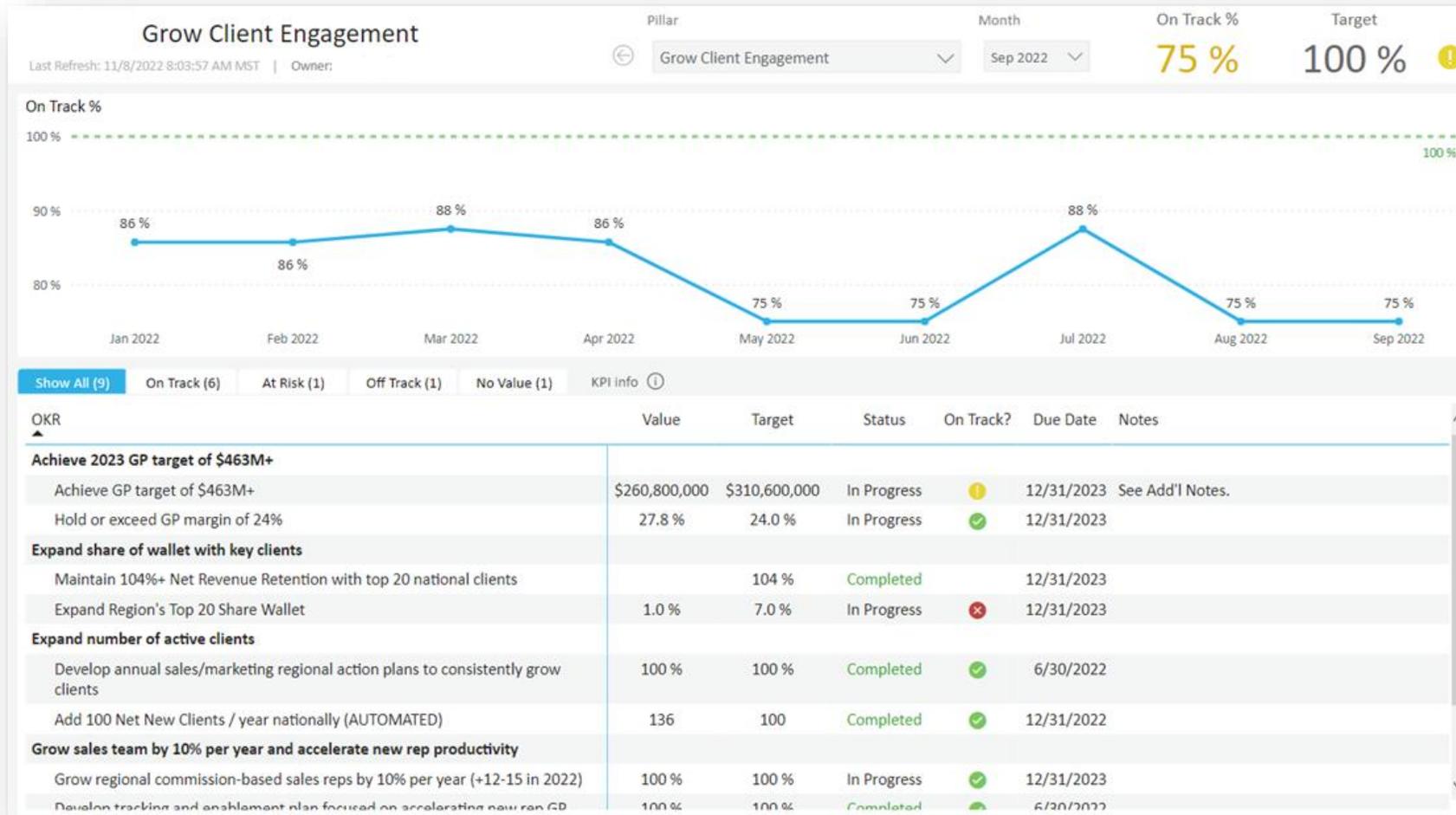
- Blue Margin's proprietary templates and architecture enable company scorecard deployment in approximately 2 weeks
- Designed to deliver immediate visibility to the board and management team, the company scorecard galvanizes alignment on the company's value drivers
- Goals and KPI thresholds are easily modified, creating a dynamic roadmap for dashboard deployment throughout the company
- As connections to source systems are built, refresh of the company scorecard becomes automatic





phase one - okr drillthrough

Each OKR Pillar includes a drill-through dashboard that shows progress against key results





phase two – development sprints



**intro
call**
~30 min



**scoping
workshop**
60 - 90 min



**proposal
review**
~30 min



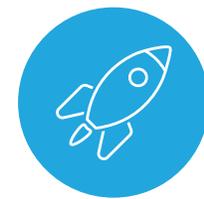
SOW



**wireframe &
architecture**
~3 x 60 min



**development
review(s)**
~4 x 60 min



**UAT &
deploy**
~60 min

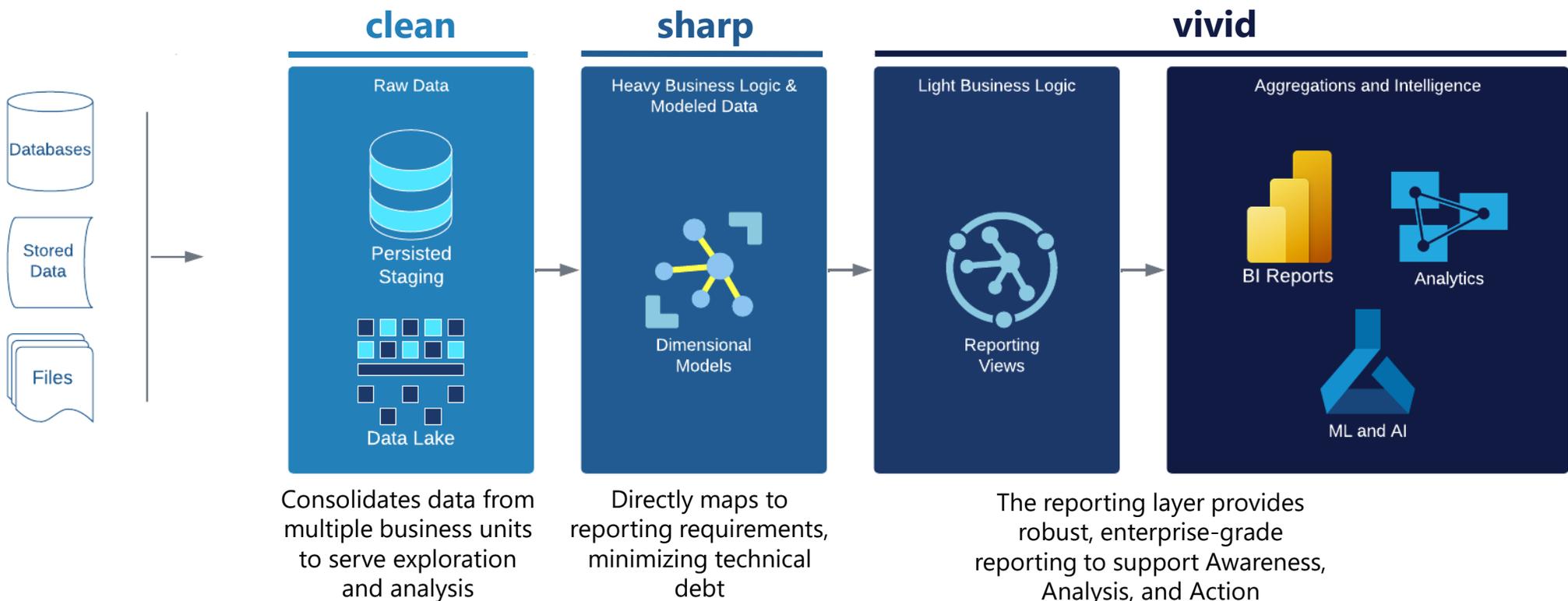
1 week

4 weeks



phase two – architecture

Uniquely tailored to midmarket companies with a mandate to scale quickly, Blue Margin's Clarity Data Architecture is modular, scalable, performant, and easy to maintain. Our methodology follows the most current architecture standards, employing a framework that is clean, consistent, and comprehensible by both business and tech professionals. Most importantly, Clarity "mirrors" the client's business model, delivering the **visibility** stakeholders need most.



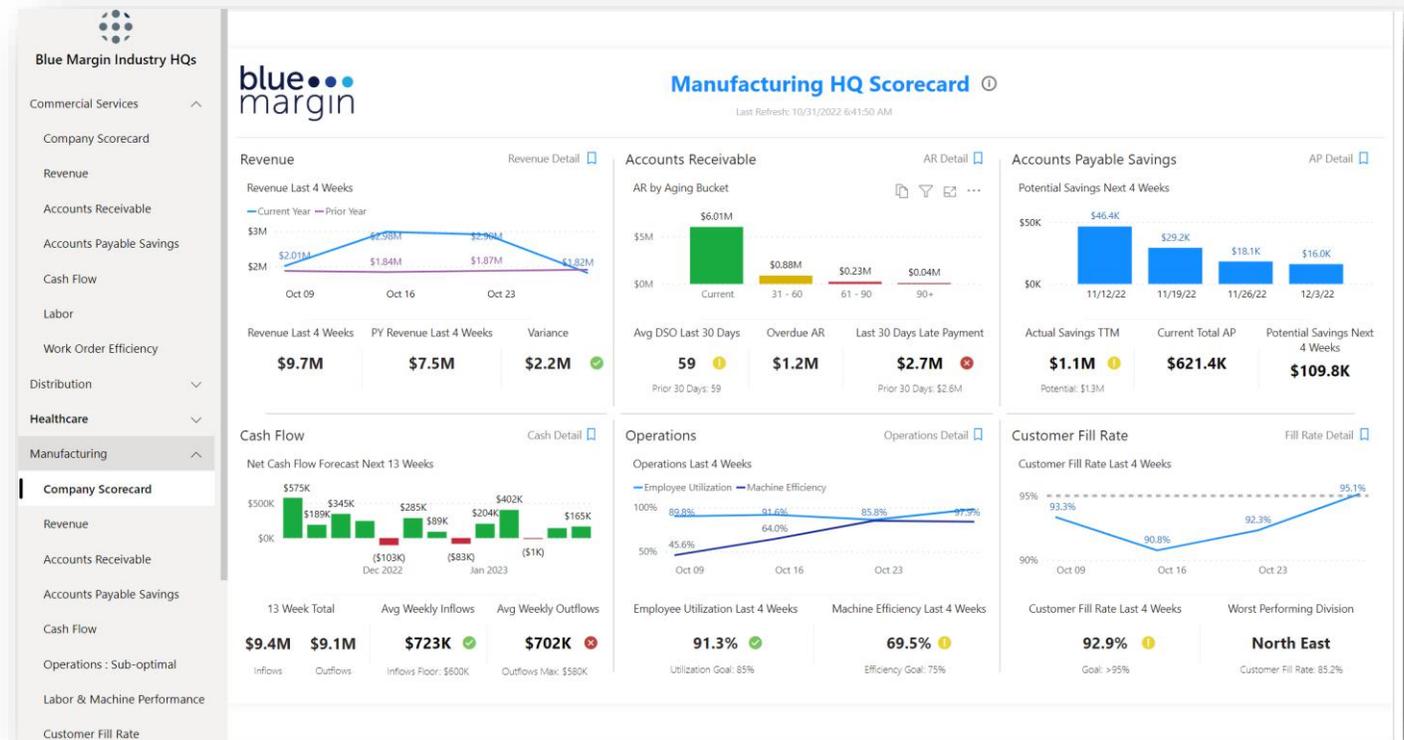


phase two – industry templates

BMI's "Industry HQs" and templates consolidate dashboarding best-practices from 250+ mid-market companies across industries.

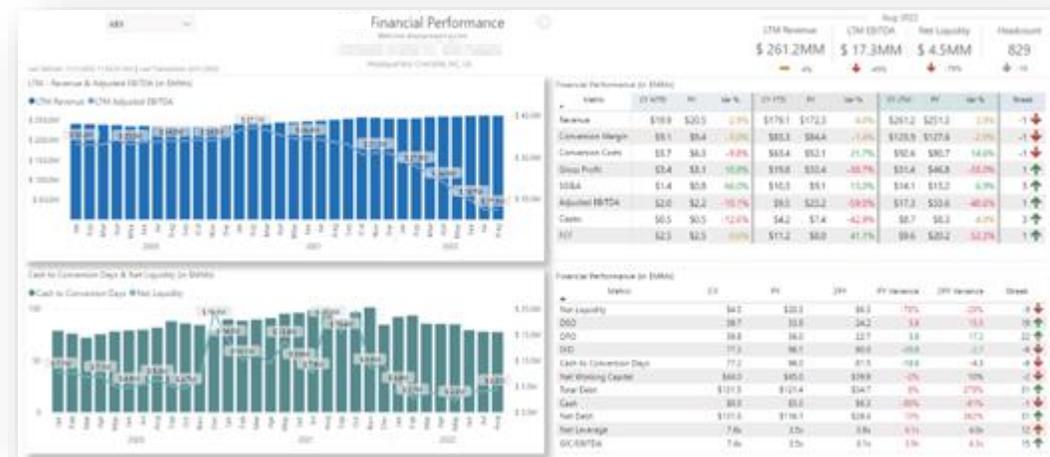
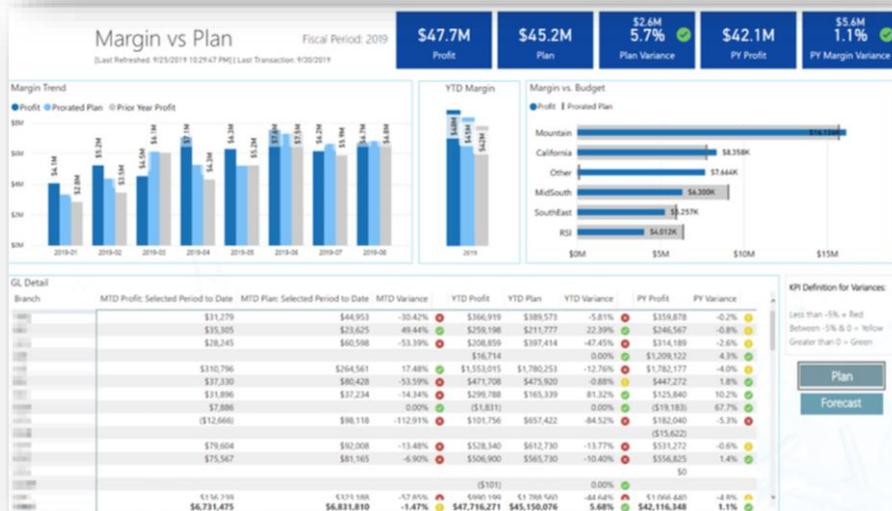
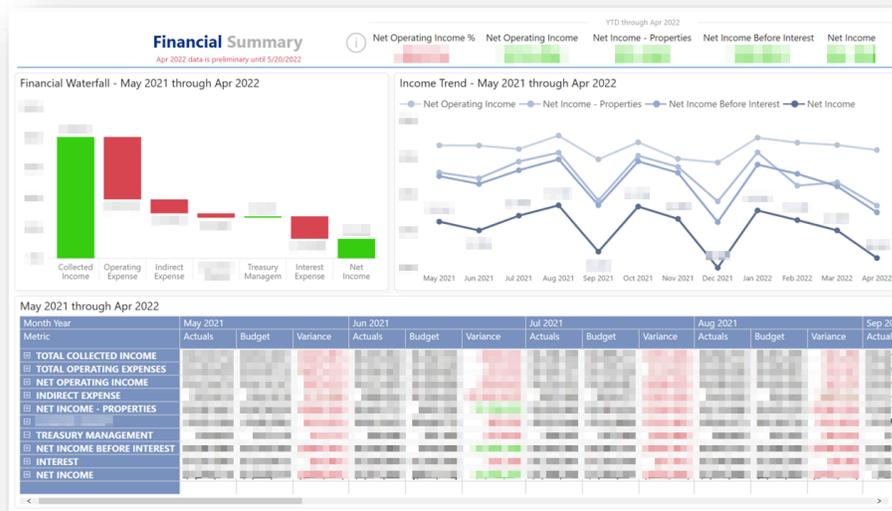
manufacturing | distribution | commercial services | SaaS | private healthcare

- Executive scorecards align deal and management teams to the most critical value drivers
- Metrics and drill-through reports can be customized to clients' specific model and VCP
- Direct connection to source systems automate data refresh
- Automated email push and full-function mobile access support top-of-mind awareness



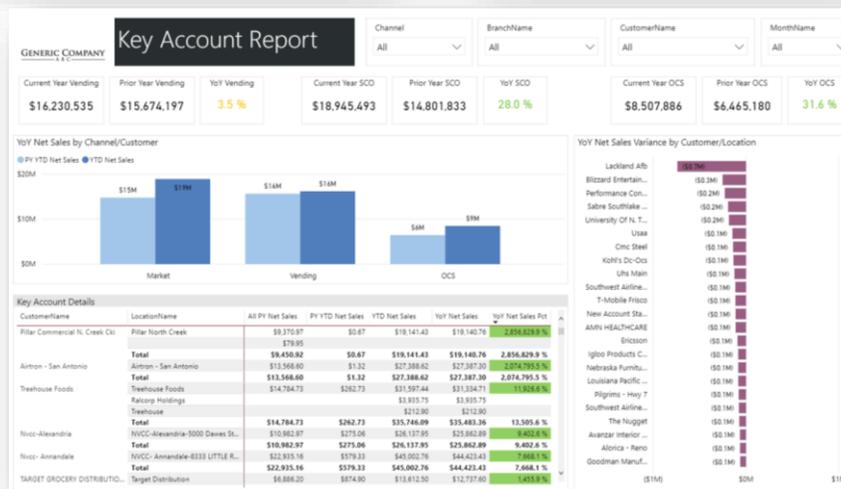
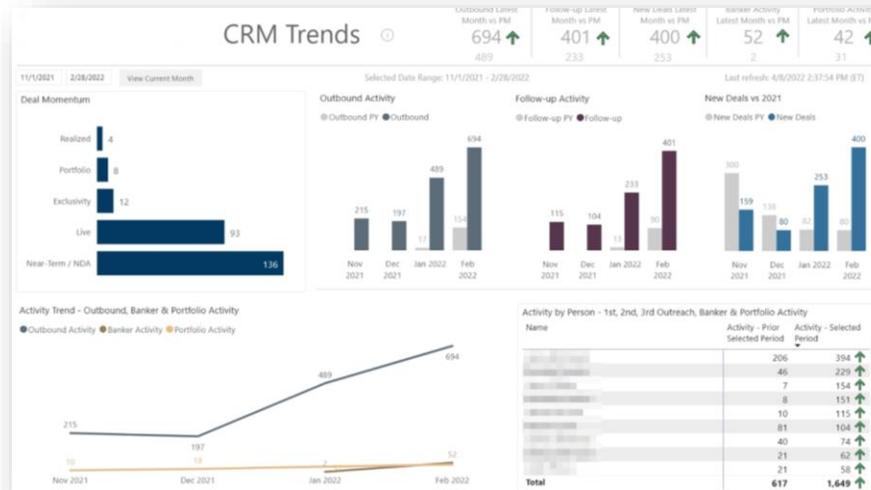
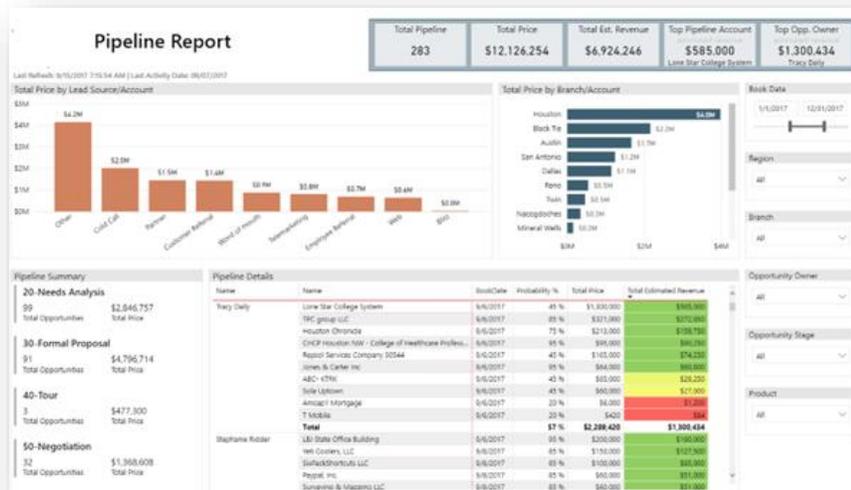


financial templates



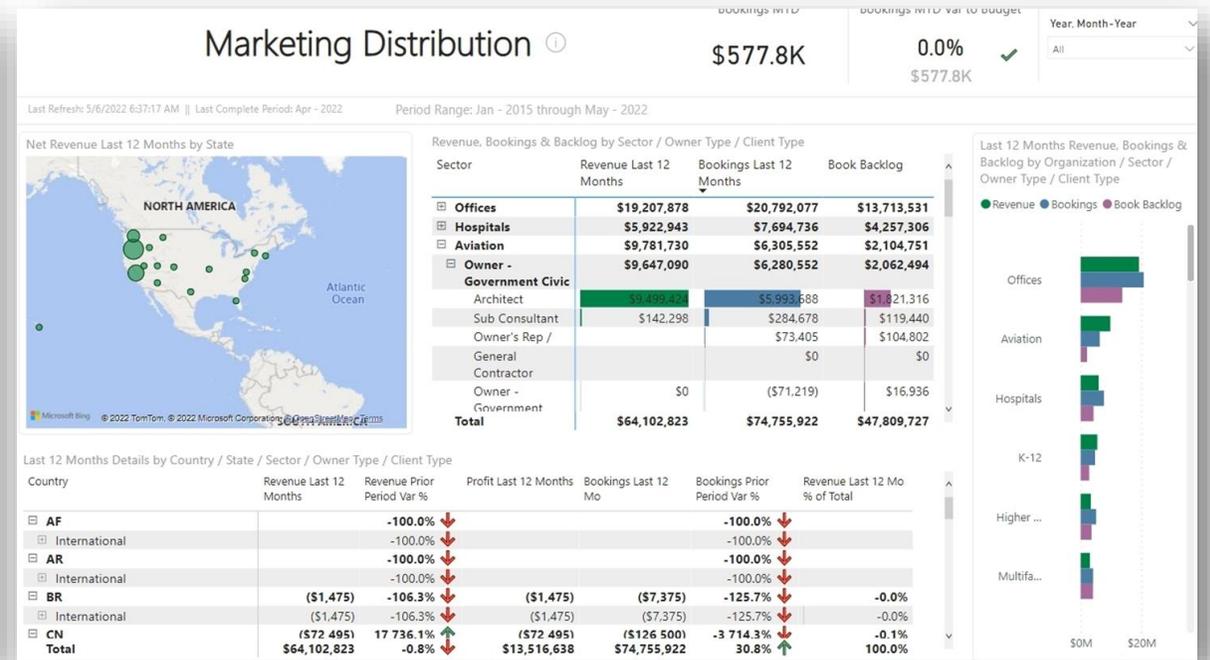
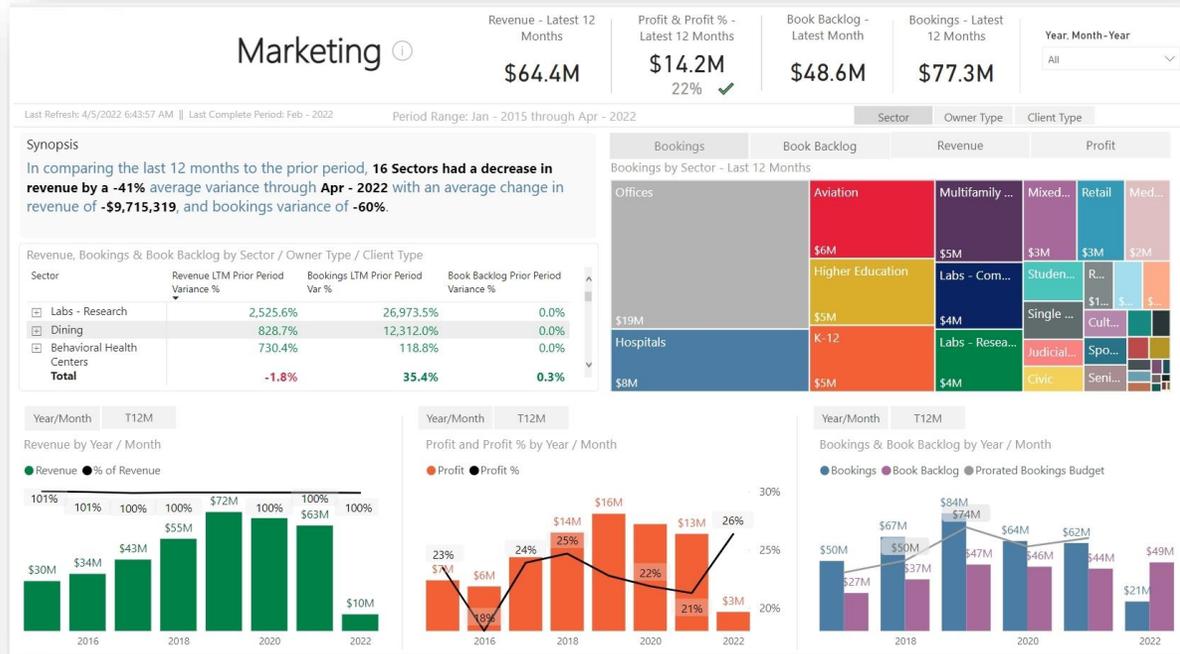


sales templates





marketing templates

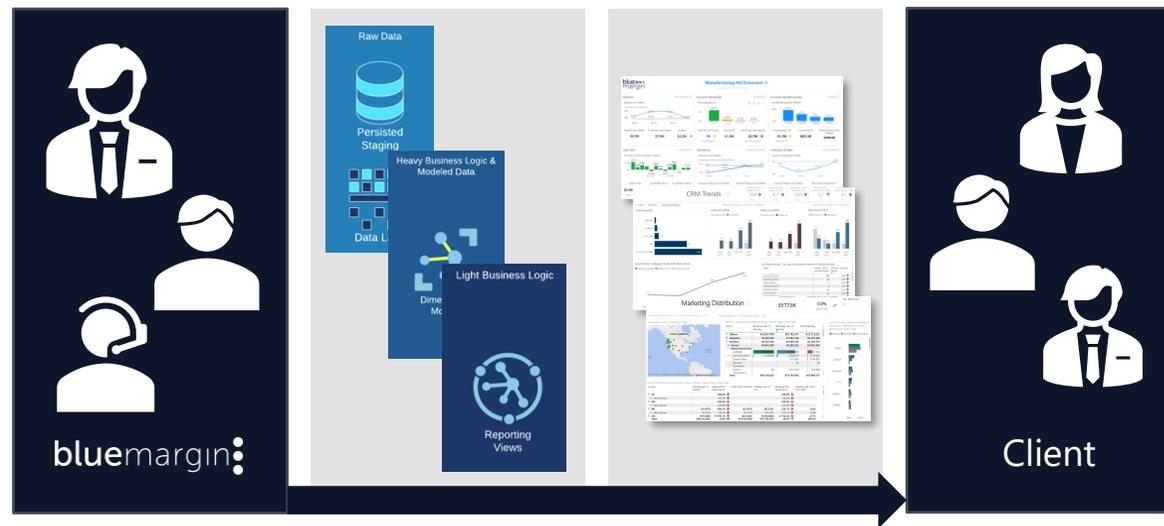




phase three – knowledge transfer

While Blue Margin can serve as your virtual data department, we identify early those elements the client wants to manage in-house. We then support knowledge transfer with:

- Hiring criteria and candidate vetting
- BMI's training curriculum, ride-along skills development, and coaching/support for client's data team
- Ongoing partnership to fill gaps and provide surge capacity
- Strategic advisory and virtual-CDO support
- Diligence and data-room support at exit





phase four – maximizing valuation at exit

To maximize return on investment, PE firms must be able to show *in real numbers* the value created, and the potential for further value creation after sale:

- Minimize discounts applied for “skeletons” and other unknowns
- Differentiate from competitors by showing mastery of the business, it’s metrics, and the value creation narrative
- Create buyer confidence through transparency and visual analytics, rather than a data room (i.e., data-dump)



let's talk

strategy first
measurable ROI
no black boxes

"Blue Margin is helping [us] operationalize the metrics-based rigor and accountability that had been lagging organizationally. Our data insight is the cornerstone to our growth, helping us *increase operating margins 4-5% and reduce turnover by 52%*"

– **Amy Freeman, COO, CoolSys**

"With better insight, we can now ID high freight costs and move between carriers to *save hundreds of thousands of dollars.*"

– **Justin Gossard, Dir Ops & IT, Equilibrium Catalyst**

"You have delighted us beyond our expectations. After reviewing the dashboards Blue Margin developed, I realized this might be the *most important thing I've been involved with in the last 5 years* in this company."

– **Bill Ganss, President, Fastener Distribution Holdings**



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bluemargin 

The logo for Blue Margin, featuring the word "bluemargin" in a dark blue, lowercase sans-serif font, followed by three vertically aligned blue dots of increasing size to the right.

