

# CASE STUDY

## Vital GTM strategist to accelerate growth

**INDUSTRY:** Financial Services

**BUSINESS TYPE:** B2B

### CHALLENGE

A managing director came to us with a critical need for a growth strategy consultant for their financial services company. After several years of holding the company and experiencing annual organic growth, the PE firm was looking to accelerate growth within the portfolio company by reevaluating their GTM strategy. With a desire to grow the top line, the managing director had a crucial need for a growth strategist who could help drive revenue through the improvement of the sales process and close rate while leading the analysis of overall go-to-market and growth options.

### RESULT

Within less than 24 hours of the initial scoping call, the PE firm and portfolio company were introduced to a select few PE-grade strategy consultants that specialized in evaluating growth in the financial services sector. The client selected their ideal choice, and the PE firm was able to confidently drive an excellent outcome without wasting or cost. With the strategy consultant's guidance, the portfolio company was able to implement an organic strategy to increase revenue and grow the company.

### SOLUTION

Leveraging our founder's 20 years in private equity, we have extensive frameworks for assessing PE-grade GTM & growth strategy needs. BluWave utilizes technology, data, and human ingenuity to pre-map, assess, monitor, and maintain deep pools of growth strategy consultants that uniquely meet the private equity standard. We interviewed the PE firm to understand their specific key criteria, and then connected the client with the select pre-vetted independent consultants from our invitation-only Intelligent Network that fit their exacting needs.

“ BluWave connected us with a top tier sales consultant, who understood working with LMM companies and driving change in a hands on way, while also delivering strategic insights

- Managing Director at PE Firm