

Accelerate Value Creation across Private Equity PortCos

Build stronger operations across your firm without building more infrastructure.

Williams Lea transforms portfolio operations for private equity sponsors and their holdings without the cost and complexity of building additional internal teams.

Through our Centres of Excellence, we orchestrate specialist expertise, smart technology, and agile delivery to drive growth and portfolio value.

Turn Operational Excellence into Portfolio Value

Williams Lea future-proofs firms through scalable, tailored support that enable them to achieve their target internal rates of return (IRR).

Our portfolio-wide Master Service Agreements (MSAs) streamline capability deployment across holdings, driving operational consistency and boosting exit valuations.

Core Drivers for PE Firms

1. Growth

Accelerating

- Market penetration
- Capacity and capability creation
- Pitch-to-close speeds

2. Synergy

Harmonising

- Administrative workflows
- Operations across portfolio investments
- Standardisation and shared services

3. Efficiency

Reducing

- Fixed overheads
- Agency recruitment dependencies
- Unstandardised labour spend

Specialist Support, without the Additional Overhead

Access specialised expertise, tech-powered services, and anytime-anywhere support so internal teams can focus on customers and business priorities.

Business Support

Improve how work gets done. Make critical operations more efficient, resilient, and scalable.

- Administrative support
- Intelligent document processing
- Tech-enabled presentations
- Insights and analytics

Backoffice Transformation

Modernise the enterprise engine room. Enhance how work moves through the system.

- Finance SSC
- Domain operations
- Workflow redesign and automation

Creative and Marketing

Boost brand recognition and recall. Create, activate, and scale customer engagement.

- Creative and content
- Campaign operations
- Brand-consistent scale

Workplace and Office Services

Elevate the workplace experience. Take care of the details so teams can focus on higher-value work.

- Print and mailroom
- Reprographics
- Front-of-office services
- Workplace support

Scale Operational Excellence with our Centre of Excellence

Williams Lea's dedicated Centres of Excellence (CoE) handle non-core, specialised operational tasks so your deal teams and portco leaders are free to focus on revenue and strategic growth.

Our European onshore CoE infrastructure in Leeds and London, alongside global hubs (Wheeling, Columbus, India), deliver 24/7/365 support.



See the Transformation in Action

Global investment institutions trust us as their transformation partner because we consistently deliver proven operational execution, strict regulatory compliance, and guaranteed performance across the world's most demanding financial environments.

\$30M+ Annual Cost Savings and 400+ FTE CoE Deployment for PE Buy-and-Build Strategy

The Challenge

Following an aggressive buy-and-build M&A strategy, a private equity-backed financial services firm faced severe operational friction across 30+ acquired locations. Interoperability issues, fragmented systems, and rising staff attrition threatened to stall post-acquisition value creation. With rapid expansion increasing operational exposure and security risks, the sponsor needed a scalable operating platform to:

Consolidate back-office functions

Reduce blackout periods

Protect portfolio margins without
disrupting ongoing business operations

The Approach

Williams Lea partnered with the firm and its PE sponsor to build a high-capacity, 400+ FTE dedicated CoE operating within a secure two-site business continuity framework.

We executed a comprehensive process-mapping exercise across 300+ operational steps, embedding risk-grid controls, automated data masking, and modular RPA solutions to streamline high-volume workflows. To ensure seamless transition governance, we deployed client-integrated training modules and a centralised solution database to eliminate data blackouts during system consolidations.

The Impact

The operational overhaul delivered:

\$30 million+

cost savings annually, driving direct EBITDA expansion for the PE sponsor

\$10 million+

worth of potential exposures prevented

\$780K

cost savings per annum through localised RPA and BOT solutions

150+

process improvements that increased quality from 99.50% to 99.95%

81 NPS

with a 94% client satisfaction rating

5 days to 3 days

reduction in the blackout period

This created a resilient, highly scalable platform that empowered the sponsor to execute further bolt-on acquisitions seamlessly.

Ready to Optimise Efficiency and Accelerate Exits?

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