

Augmenting the deal pipeline for a European family office



- Deal origination
- Proactive opportunity tracking
- Buy-side advisory

Business need

- The private equity arm of a multi-family office was looking for regular support to augment its deal pipeline in Western Europe.
- It mandated us to develop and manage a master deal origination tracker of companies in the lower mid-market space on an ongoing basis.

To develop and manage an ongoing tracker of potential target companies in Western Europe.

The client outlined three key reasons for selecting RocSearch:

- Our ability to rapidly deploy experienced and highly pedigreed investment advisory teams.
- Our proven deal origination capabilities and flexible client-centric engagement models.
- Our extensive exposure in the European lower mid-market space.

Approach & Methodology

- The dedicated team set up for the client created a Master Deal Dashboard of family and founder-owned businesses in the client's focus sectors, sourced from a combination of market-leading databases, several league tables and other relevant ranking and award directories.

Using our comprehensive RocEye approach, we created a master deal dashboard, through which we could update the client about 10-20 new promising opportunities every week.



- The dashboard was a comprehensive and live universe of companies in the lower mid-market space across select geographies of Western Europe.
- It would be updated with new opportunities every week and every year for the latest financials and ownership of target companies.
- Each week, we would share 10 – 20 high-potential targets across sectors, matching the client's investment criteria.

Business outcomes

- The deal pipeline tracker provided the client with a steady stream of potential targets every week.
- During the tracker's six-month deployment, the client successfully held second-round meetings with four targets.
- The exercise saved the client 1,000+ analyst hours.

During the tracker's six-month deployment, the client successfully held second-round meetings with four targets, thus saving 1,000+ analyst hours.

About RocSearch

Founded in 1999, RocSearch has been a pioneer in empowering our clients to overcome challenges and realize their goals. Our strength is delivering research and advisory solutions through managed and dedicated teams that produce the expert intelligence our clients require to gain a true competitive advantage.

We draw on proven expertise to deliver consistent value across all types of business requirements: ranging from digitization and analysis of business, financial, or customer data to the provision of 'act-on' insights for the most challenging business problems.

Our longstanding client relationships bear testament to the enduring value we create, alongside our consistent reliability and absolute discretion. We take great pride that many of the brightest global companies rely on us to help them achieve top-line growth, operational efficiency and increased profitability.

www.rocsearch.com



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