



Linedata

Case study

Enabling a private equity firm to digitally transform its portfolio

\$500K in IT savings and higher investment returns thanks to technology consolidation and optimization program from Linedata

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Remote working during COVID-19 underscored the importance of robust IT infrastructure and cybersecurity at our portfolio companies. Faced with an unfamiliar process and a tight timeline, Linedata helped us turn a point of concern into a position of strength, while enabling us to enhance returns and reduce time horizons.”

Managing Director, \$2B Private Credit Fund



Client Challenges

- Antiquated technology stack in the portfolio company's datacenter
- High cost of outdated, per-engagement remote support model
- Insufficient automation and integration of CRM and finance applications
- Uncertainty on best technology approach to shorten timeframe and maximize returns



Our Solution

- Detailed assessment covering private vs public cloud and API integration
- Cost modeling and workflow development to maximize efficiency and savings
- Public cloud solution based on Microsoft Azure and Office 365 with AIOps
- Dedicated onsite and 24/7 remote support on a flat-rate basis



Client Benefits

- Digital transformation, resulting in business-wide reduction in technical debt
- Strong, firmwide data protection leveraging public cloud cybersecurity features
- Enhanced data analytics, reporting, oversight, and control and fewer manual errors
- \$500K cumulative savings over five years (26% savings vs incumbent provider)



Linedata's client in this instance is a private equity firm with multiple portfolio companies at varying levels of IT maturity and stages of value creation. Management Company leadership wanted to centralize its technology to protect its investment and mitigate risk while delivering an optimized, secured, and scalable IT infrastructure.

The project began with the digital transformation of one of the firm's portfolio companies, a home security company with offices in five states. Its operations were weighted down by technology debt, costly per-usage remote support contracts, and outdated hardware/platforms. The basic office infrastructure needed nearly a full refresh, including a public cloud migration, up-to-date hardware deployment and software provisioning.

Linedata defined and delivered a full digital transformation. AIOps automated much of the IT implementation, speeding time to effectiveness while reducing cost. Training of the company's 125-member workforce – which has since grown to over 250 – was managed with relative ease, compared to the incumbent on-boarding/off-boarding process. Replacing the antiquated technology stack has enabled automation of AI/ML analysis and reporting while reducing cybersecurity risk and removing “concern over basic IT” from the management's radar.

As a Managed Services Provider (MSP), Linedata's technology experts have mapped out \$500K in IT savings over five years for this one portfolio company alone. Additional technology consolidation and transformation is underway at the PE firm's other portfolio companies. These promise to deliver similar returns, while providing performance, scalability, security, and data analytics benefits.

\$500K
in technology savings

**Flexible hybrid
cloud**
model and API integration

**Digital
transformation**
in under 6 months

Enhanced returns
and shortened
investment time horizon

About Linedata Technology Services

Our Linedata Technology Services portfolio includes Cloud, Cybersecurity and Managed Services that address the specific requirements of private equity, hedge funds and asset managers. You can focus on your core business, knowing your IT and cybersecurity requirements are in good hands.

About Linedata

With 20 years' experience and 700+ clients in 50 countries, Linedata's 1100 employees in 20 offices provide global humanized technology solutions and services for the asset management and credit industries that help its clients evolve and operate at the highest levels.