

Transforming Private Equity Governance



Governance Challenges

For private equity firms, a strong governance framework is more important than ever. Effective oversight and partnership with portfolio companies helps firms implement transformational initiatives that drive growth and mitigate risk.

Two key factors underpin the success of these value building strategies. Clearly, reporting that is consistent, readily accessible and actionable is now table stakes.

Of equal importance is the need to facilitate collaboration that focuses on goals and establishes trust between stakeholders at all levels of the business.

Most firms, however, still rely on disparate tools to execute governance initiatives.

Dashboards and reports are built using everything from rich business intelligence applications down to spreadsheets and slides.

Communication between teams takes place predominantly via email, messaging, over the phone and through in-person meetings, often resulting in high travel costs and lost productivity.

Multiple versions of documents reside in multiple places, and data can be scattered across a range of systems, leading to further inefficiencies.

CafeX answers these challenges with one secure governance solution in the cloud.

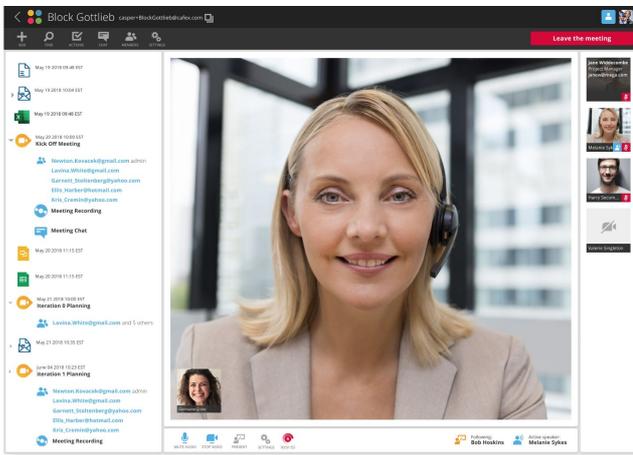
Data-Driven Governance

Business intelligence and collaboration seamlessly combined in one cloud platform



One Closed-Loop Journey

From the office or when mobile, firm managers and their portfolio companies can access CafeX's cloud application to track the performance of key initiatives, create actions, meet live and collaborate effectively as a team to drive transformational activities.



KPI and Initiative Tracking

Portfolio managers can identify a consistent set of key performance indicators for each company, define associated actions, assign owners and keep this information current in one platform.

Easy Real-time Collaboration

Stakeholders can meet live simply by clicking a web browser link on their computers and mobile devices or by dialing in over the phone. Teams can communicate using HD voice and video, text chat and screen sharing.

For improved productivity, a virtual assistant can take care of scheduling meetings, inviting participants, uploading content and other administrative tasks.

Secure Content Sharing

With CafeX, participants have documents, conversations and other information at their fingertips in one place. Content can be uploaded from users' devices or linked securely to third party sources, including cloud storage repositories, CRM systems, messaging tools and email platforms.

Business Intelligence Reporting

CafeX provides a reporting API that enables firms to extract activity data and build rich visualizations in popular business analytics services like Microsoft Power BI.

Performance can be monitored using a consistent set of reports updated frequently. Dashboards and heat maps give a snapshot of business health. Trending graphs help firms take proactive measures to address potential gaps. Managers can drill down further on at-risk KPIs to perform root cause analysis of associated initiatives.

Actual YTD vs Plan		\$ in millions				Actual / Plan		
Company	Bookings	Revenue	EBITDA	Opex	>99%	75% - 99%	<75%	
Company A	17.2	16.8	17.3	10.4				
Company B	26.7	29.4	50.7	10.6				
Company C	43.3	38.7	43.7	12.4				

Compliance and Audit Trail

Meetings are recorded and transcribed for playback and compliance purposes. User activities within CafeX's collaboration platform are also tracked to preserve an audit trail.

To learn more, reach us at www.cafex.com.