CAPABILITY STATEMENT, PRIVATE EQUITY SPONSORS

iB Consulting USA

Independent diagnostics of how a portfolio company is governed, how its management team decides, and how it performs, before close or inside the first hundred days, with help putting the findings into practice. Independent evidence at a fixed fee on a fixed timeline.

FOR Sponsors and operating partners | **WHEN** Pre-close or first 100 days | **FEE** Fixed at engagement | **SIZE** Small business, SBA WOSB

Mel K Meier, DBA
PRINCIPAL

2007
Examining organizations under the Baldrige framework since

50+
Organizations examined under the framework

2023
Appointed Master Examiner, state performance excellence program

2017
Firm established, woman owned since founding

Core competencies

1 Portfolio company diagnostic

Compares what the operating documents prescribe with what the management team does in practice, using the Baldrige Excellence Framework, a management survey, and interviews. Findings and a roadmap with named owners.

About 30 days, inside the first hundred days.

2 Pre-close management read

The same examination scoped to the diligence window. Who makes the pricing, hiring, and capital decisions in practice, and what to watch after close.

Scoped to the diligence calendar.

3 Implementation support

Hands on help for the management team to put the roadmap into practice, with owners, milestones, and check ins against the hundred day and value creation plans.

Monthly, scoped to the roadmap.

4 Board advisory and executive sessions

A retained advisor or independent board member for portfolio company boards, with board pre read review and an annual decision quality pulse. Sessions on governance and decision making under pressure.

Single sessions or a twelve month retainer.

> **Custom engagements.** The four areas above are the most common requests. Any other need can be scoped with the fixed fee and timeline set in writing before engagement. To learn more about other services, including governance and policy review and culture assessment, visit ibconsultingusa.com/private-equity.

What sets the work apart

- Examiner led. The principal has examined organizations under the Baldrige framework since 2007, was appointed Master Examiner in 2023, and conducts every engagement personally.
- Two sources of evidence on every finding, the documents and data, and the people doing the work. Where they differ, the difference is reported as an opportunity with an owner.
- Fixed fee and fixed timeline, set before engagement. The report belongs to the sponsor, and no product or follow on sale is tied to any recommendation.
- **Confidential by design.** A confidentiality agreement or NDA is signed before any document changes hands. Survey responses are aggregated, and client confidentiality is protected.

Common uses

- Diligence on the management team before close, inside the deal calendar.
- A baseline the hundred day plan and the value creation plan can be measured against.
- Ahead of an add-on acquisition, an independent second reading of how the platform team decides.
- Leadership transitions, a new CEO or CFO, or a board that wants an outside read.
- Putting the roadmap into practice after the diagnostic, on one company or across the platform.

Registrations and certifications

SAM.gov	Active registration, UEI HK53V4DXAXL9
SBA WOSB	Certified woman owned small business
State of Nebraska	Registered contractor, Vendor ID 2814313
Nebraska DED	CDBG Certified Administrator
Tennessee Go-DBE	Certified Woman Business Enterprise
Insurance	Certificates available on request

Engagement paths

- Engagement letter with the sponsor or the portfolio company, scope and fixed fee set in writing before work begins.
- Start with one diagnostic on one company, then implementation support with the management team, or retained advisory on one company or across a platform.
- Fixed fee set at engagement, invoiced by milestone. No hourly billing. Travel at cost, capped in the engagement letter.
- **Independent.** Not an investment bank. No deal sourcing, financial modeling, or capital raising, and no lender or search firm behind the work.

Request a 15 minute scoping call

Bring the question you have, even if it is not listed above.

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