



## Customer Overview:

- ✓ A leading PE Firm engaged Profit Advisory Group to strategically source their North America spend for Wireless Services
- ✓ \$14 billion in assets under management
- ✓ Project included 26 operating companies
- ✓ Approximate spend of \$30,000,000

## Key Challenges & Objectives:

- ✓ Challenges included extensive data collection effort with multiple carriers in US and Canada
- ✓ Key objective was to reduce cost and gain greater control of the North America spend.
- ✓ Additional objectives included achieving more favorable terms and conditions through a strategic sourcing and optimization effort.
- ✓ Creating a single PE wide agreement with the major providers.

## Profit Advisory Group Solution:

- ✓ Extensive Data collection using standard Profit Advisory Group Data Collection processes. Questionnaires were created and sent out to operation companies to gain insight into the current conditions.
- ✓ Profit Advisory Group authored an RFP that was distributed to the carriers of choice.
- ✓ Projects were created to focus on the different categories areas for saving opportunities.
- ✓ Phase one focused optimizing the spend based on the user usage profiles with each carrier. Phase two focused on getting the best terms and conditions with each vendor including discounts promotions and incentives.
- ✓ Using Profit Advisory Group's proven 3 phased optimization process we able to identify billing errors, waste and purchase maximization opportunities in the current user population. Through extensive analysis of the billing data we developed an accurate user profile for each of the vendors and from there created a Strategy to right size the plans.
- ✓ PAG negotiated with 6 carriers to create portfolio wide agreements that would give single pricing for all Operating Companies.
- ✓ Profit Advisory Group insured that the vendors had proper language for on boarding of new companies and as existing companies that leave the portfolio can keep the rates until the contract expires.



## Results:

Client was able to reduce the current spend by USD \$5.8 Million annually. This was achieved by optimizing the plans and eliminating waste.

The operation Companies were able to collectively gain more favorable terms as a group.