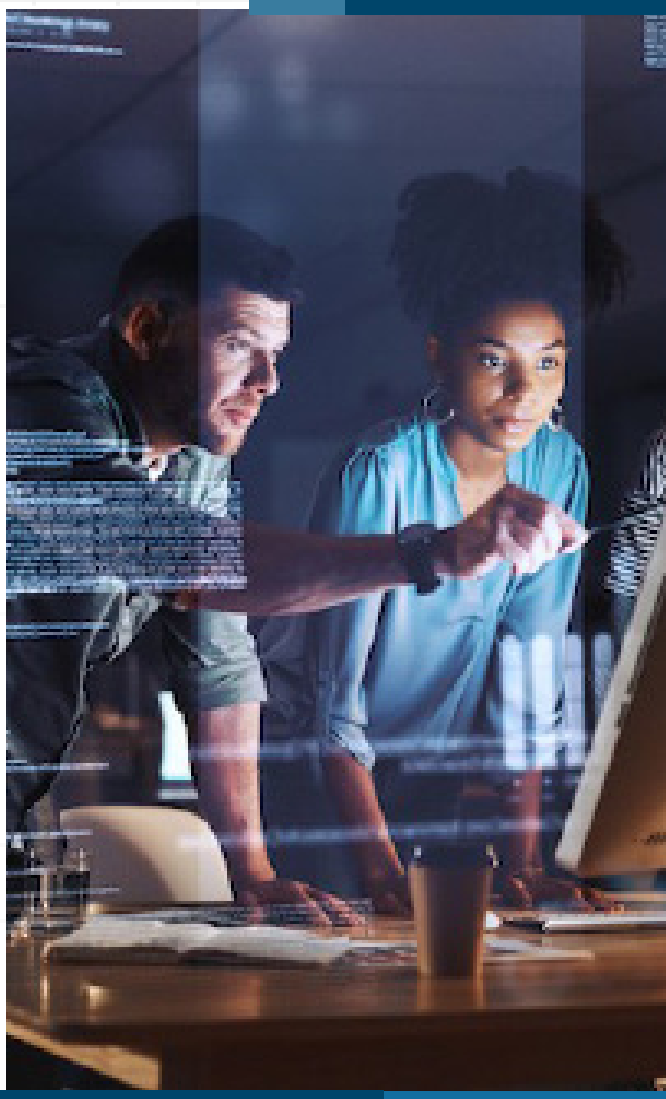
The Private Equity Playbook for IT Success.

A Guide to Managed IT Services Across Your Portfolio.



Braver® Technology Solutions
A New Charter Technologies Company

www.bravertechnology.com

Strategic Managed IT

The Key to Private Equity Growth, Security, and Scalability

Explore how a strategic approach to IT can become your competitive advantage.

Private Equity (PE) success is measured by growth, scalability, and return on investment—but too often, IT is an afterthought in the equation. When acquiring a new company, firms move quickly to assess financials, operations, and legal matters, but what about the technology infrastructure that powers it all?

Disparate systems. Unknown cybersecurity risks. Incompatible platforms. Hidden costs. These are just a few of the challenges PE firms face when onboarding a new portfolio company without a cohesive IT strategy in place. This guide is your playbook. Whether you're acquiring your first company or managing a portfolio of twenty, this guide will help you understand the critical role IT plays in value creation. From streamlining operations to securing data and standardizing systems, Managed IT Services are no longer a luxury—they're a necessity.

Braver Technology understands the complexities of managing IT across multiple portfolio companies. As a trusted IT partner, we provide a seamless, nationwide, and fully integrated IT solution tailored to the needs of PE firms. Our expertise in IT standardization, security, and scalability ensures that every portfolio company benefits from enterprise-grade technology while maintaining operational independence. With a proactive approach to cybersecurity, compliance, and IT governance, Braver delivers a strategic advantage, helping PE firms streamline operations, mitigate risks, and enhance the overall value of their investments.

Through our comprehensive Managed IT Services, Strategic Consulting, and Nationwide Support Network, Braver Technology empowers PE firms with the technology infrastructure they need to drive growth, efficiency, and long-term success.

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CHAPTER 1

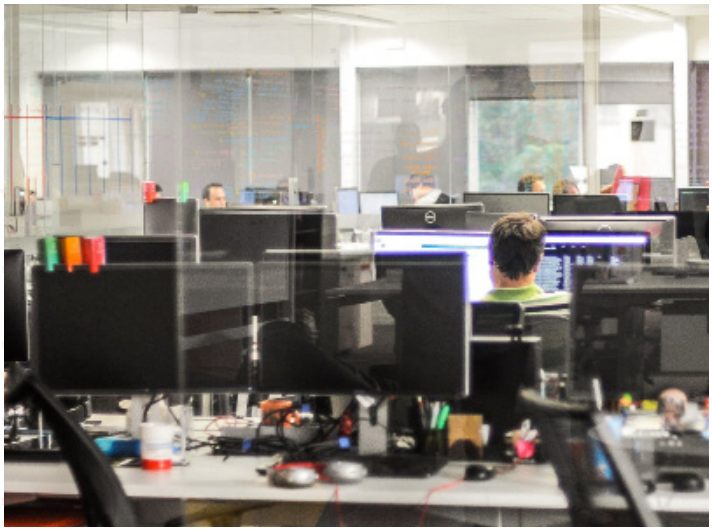
The IT Challenges of Private Equity Firms

SECTION 1

The Unique Nature of Private Equity IT Needs.

Understanding the Landscape.

Private Equity (PE) firms operate under a distinct set of pressures and priorities compared to traditional businesses—especially when it comes to technology. Each acquisition adds a new layer of complexity, and IT must keep pace with the speed, agility, and scale demanded by the investment lifecycle. Here's how PE firms face unique IT challenges:



A DIFFERENT APPROACH TO IT STRATEGY

Transactional mindset: Unlike traditional businesses that evolve their IT slowly over time, PE firms often make rapid, high-impact decisions. IT must be able to scale, consolidate, or divest quickly based on the firm's investment goals.

Shorter timelines for value realization: The focus is on maximizing enterprise value as efficiently as possible, which means technology can't be an afterthought, it must be a key driver from day one.

Portfolio-wide thinking: PE firms aren't managing just one business, they're orchestrating a network of companies that need to work together, share best practices, and often align on tools and systems.

THE SPEED + COMPLEXITY OF ACQUISITIONS

Fast-paced transitions: PE deals move quickly, and technology assessments often lag behind financial, operational, and legal reviews, creating risk.

Inherited IT environments: Each new acquisition brings its own set of hardware, software, vendors, and unknowns. Some systems may be outdated, unsecure, or entirely incompatible with the rest of the portfolio.

Disruption risk: IT downtime, integration issues, or security lapses during onboarding can delay value creation and damage trust with stakeholders.

AGILITY WITHOUT COMPROMISING SECURITY OR COMPLIANCE

Need for flexibility: PE firms require IT frameworks that can adapt to rapid changes, whether onboarding new companies or preparing a business for exit.

Compliance complexity: Each portfolio company may be subject to different regulatory requirements (HIPAA, SOC 2, PCI, etc.), which makes maintaining compliance across the board a major challenge.

Cybersecurity risk: Fast integrations, decentralized systems, and lack of standardization can leave PE firms exposed to breaches, data loss, or reputational damage if security isn't baked in from the start.

Technology as a Value Multiplier:

In the private equity environment, technology is no longer just a support function, it is a strategic asset and a key lever for driving value creation across portfolio companies. The IT decisions made early in an acquisition directly impact scalability, operational efficiency, and profitability.

By prioritizing IT as part of your investment strategy, Private Equity firms can significantly enhance the value of each acquisition and position their portfolio companies for a smoother, more profitable exit.

HOW IT IMPACTS SCALABILITY, EFFICIENCY, AND PROFITABILITY

SCALABILITY

A modern, standardized IT infrastructure allows portfolio companies to grow rapidly without reinventing the wheel each time. Cloud-based systems, integrated platforms, and scalable support models enable quick onboarding and expansion.

EFFICIENCY

Streamlined workflows, consolidated systems, and centralized IT support reduce redundancies and operational costs. Automation and optimized processes create leaner, more agile businesses.

PROFITABILITY

Reducing tech-related overhead, minimizing downtime, and improving team productivity all lead to stronger margins. IT becomes a value generator, not just a cost center.

REAL-WORLD IT PITFALLS THAT REDUCE ROI

INCOMPATIBLE SYSTEMS

Disparate CRMs, ERPs, and communication tools can slow integration and create inefficiencies post-acquisition.

CYBERSECURITY GAPS

Unknown vulnerabilities inherited during M&A events can lead to costly breaches, regulatory fines, or reputational damage.

SURPRISE COSTS

Hidden legacy infrastructure issues, unsupported software, or insufficient bandwidth often surface after acquisition, eating into expected returns.

HOW MODERN IT STRATEGIES BOOST ENTERPRISE VALUE

STRATEGIC IT MANAGEMENT

Outsourcing IT through Managed Services provides expert support, consistent performance, and predictable costs across the portfolio—freeing up resources to focus on growth and value creation.

MODERN, SCALABLE INFRASTRUCTURE

Upgrading to cloud or hybrid environments improves flexibility, mobility, and efficiency, while centralized support and monitoring streamline operations and simplify integration across companies.

BUILT-IN SECURITY AND COMPLIANCE

Upgrading to cloud or hybrid environments improves flexibility, mobility, and efficiency, while centralized support and monitoring streamline operations and simplify integration across companies.

SECTION 2

Common IT Challenges During Acquisitions

Acquiring a new company brings exciting opportunities, but it also introduces a host of IT challenges that can quickly derail integration plans if not properly addressed. From incompatible systems and legacy technology to security gaps and compliance risks, these issues can slow down operational alignment, increase costs, and threaten the overall success of the deal. Understanding the most common IT pain points during acquisitions is the first step to building a more streamlined, scalable, and secure portfolio.

INHERITING DISPARATE SYSTEMS AND INFRASTRUCTURE

Mismatched hardware and software: Each acquisition comes with its own mix of outdated, incompatible tech that hinders integration and efficiency.

Lack of documentation or internal IT support: New companies often lack organized IT records or dedicated staff, leaving gaps in system knowledge and support.

Varied platforms (Microsoft vs. Google, cloud vs. on-prem, etc.): Differing ecosystems make collaboration, migration, and standardization more complex and resource-intensive.

SECURITY VULNERABILITIES ACROSS THE PORTFOLIO

Legacy systems with outdated security: Acquired companies often use unsupported or unpatched systems that open the door to cyber threats.

No centralized security protocols or visibility: Without a unified security framework, PE firms struggle to monitor and enforce protection across their assets.

Increased cyber risk as new companies are acquired: Every acquisition introduces new unknowns, often with weak cybersecurity postures that put the whole portfolio at risk.

COMPLIANCE HEADACHES AND DATA PRIVACY RISKS

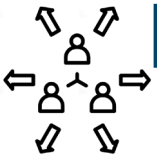
Challenges with HIPAA, PCI, SOC 2, GDPR, and industry-specific regulations: Each company may fall under different compliance mandates, making unified governance a challenge.

Varied compliance maturity across entities: Some businesses have robust policies; others have none, creating inconsistency and exposure.

Risk of fines and legal action due to noncompliance: Noncompliance can lead to costly penalties, reputational damage, and delays in transaction timelines.

Operational Inefficiencies + Hidden Costs

As Private Equity firms onboard new acquisitions, the hidden costs of fragmented IT operations often surface quickly. What initially seems like a functioning IT setup can mask a web of inefficiencies—misaligned vendors, overlapping software tools, and inconsistent support structures. These issues not only strain budgets but also hinder integration efforts and limit scalability. Without a unified IT approach, firms risk eroding portfolio value through lost productivity, duplicated costs, and operational friction. Identifying and addressing these inefficiencies early is critical to unlocking true value across the portfolio.



FRAGMENTED IT SUPPORT AND VENDORS

UNALIGNED MSPS OR INTERNAL TEAMS

Each acquired company often comes with its own IT provider or internal team, creating a patchwork of support with inconsistent service levels, tools, and protocols. This lack of cohesion complicates oversight and undermines operational efficiency.

NO STANDARDIZED METRICS / DELIVERY

Without shared KPIs, SLAs, or processes, there's no clear way to measure IT performance across companies. This makes it difficult to benchmark success, enforce accountability, or deliver a consistent experience for users and stakeholders.

VENDOR AND SLA MANAGEMENT

Managing a variety of contracts, renewal dates, and support agreements across multiple vendors is time-intensive and error-prone. It introduces risk, increases admin overhead, and limits the ability to optimize costs or performance at scale.

TOOL OVERLAP AND LICENSING WASTE

REDUNDANT TECH STACKS

Portfolio companies often use multiple versions of email platforms, collaboration tools, CRMs, or file-sharing apps. These disjointed systems can't easily integrate, causing communication gaps, inefficient workflows, and missed opportunities for consolidation.

LICENSING WASTE ACROSS ENTITIES

Duplicate or idle software licenses frequently go unnoticed, quietly draining IT budgets. Without centralized license tracking, firms pay for tools they don't need or fail to fully leverage those they have.

LOST VOLUME DISCOUNTS

When licensing decisions are made independently, firms forgo the benefits of enterprise-level deals. A centralized procurement strategy allows PE firms to negotiate better pricing, gain access to advanced features, and streamline vendor management.

SLOWED INTEGRATION AND PRODUCTIVITY LOSSES

DISRUPTION FROM DOWNTIME

Acquisition transitions often come with IT delays—system migrations, access issues, or reconfiguration mishaps—that create costly downtime and stunt early momentum for new leadership and staff.

CROSS-TEAM TECH INCOMPATIBILITY

Departments using incompatible systems can't collaborate effectively. When sales, ops, or finance teams across entities can't share data or workflows, productivity and alignment suffer.

DELAYED ACCESS TO KEY TOOLS

New stakeholders may face long wait times to get onboarded into core systems like ERP, CRM, or communication platforms. These delays reduce visibility, slow decision-making, and impact early-stage integration success.

ACQUISITION IT CHECKLIST

YOUR BLUEPRINT FOR SCALABLE, SECURE GROWTH

Technology can be the engine behind a successful acquisition or the anchor that slows it down. For private equity firms, overlooking any aspect IT during due diligence can lead to costly surprises, delays, and security risks. This Acquisition IT Checklist will help you assess, align, and optimize IT from day one, ensuring smoother transitions, scalable growth, and stronger returns.

IT DUE DILIGENCE

- ☐ Evaluate IT infrastructure health and scalability – Review systems, performance, and capacity for future growth.
- ☐ Identify technology risks and legacy systems – Look for outdated hardware, shadow IT, or unlicensed software.
- ☐ Verify compliance obligations – Confirm alignment with HIPAA, PCI, SOC 2, or other relevant regulations.

CYBERSECURITY POSTURE

- ☐ Assess existing cybersecurity controls – Review endpoint protection, firewalls, MFA, and data encryption.
- ☐ Evaluate threat exposure and incident history – Look into past breaches, phishing attacks, or known vulnerabilities.
- ☐ Protect sensitive data during transition – Ensure secure handling of customer, financial, and health-related data.

INFRASTRUCTURE COMPATIBILITY

- ☐ Review system compatibility with portfolio standards – Assess operating systems, platforms, and architecture.
- ☐ Determine cloud vs. on-prem infrastructure – Identify what can be migrated or integrated into existing environments.

STANDARDIZATION + CENTRALIZATION

- ☐ Plan for system unification – Create a timeline for migrating email, collaboration tools, and servers.
- ☐ Map out consolidation or segmentation needs – Decide what should be merged, kept separate, or phased out.

IT COST ANALYSIS + EFFICIENCY

- ☐ Look for vendor and tool overlap – Identify duplicate software or underutilized licenses.
- ☐ Find opportunities for cost savings – Explore volume licensing, cloud cost optimization, or support contract rationalization.

SCALABILITY + GROWTH READINESS

- ☐ Evaluate IT's ability to scale – Ensure infrastructure can handle user growth, geographic expansion, or M&A plans.
- ☐ Check for modern, efficient systems – Look at automation, integrations, and cloud-native solutions for back-office efficiency.

CHANGE MANAGEMENT + USER ADOPTION

- ☐ Prepare communication and training plans – Reduce friction with timely support, onboarding, and clear messaging.
- ☐ Anticipate cultural resistance – Work with leadership to drive adoption and smooth operational transitions.

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CHAPTER 2

Bridging the Gap with the Right IT Partner

SECTION 1

The Case for a Managed IT Services Approach

Benefits of having a centralized partner across all portfolio companies

Bridging the IT gap across portfolio companies begins with choosing the right technology partner, one that understands the speed, complexity, and strategic nature of private equity operations.

A Managed IT Services approach offers the structure, consistency, and foresight needed to support aggressive growth strategies while maintaining control over technology costs and outcomes. By partnering with a centralized provider, PE firms gain faster onboarding and smoother integrations across acquisitions, ensuring that every company brought into the fold meets a baseline of security, support, and performance.

This unified approach enables more predictable budgeting and proactive technology management. Instead of dealing with reactive issues and scattered

support, firms benefit from strategic oversight, continuous monitoring, and forward-thinking planning. IT becomes a catalyst rather than a roadblock, allowing stakeholders to focus on scaling value rather than fixing fragmented infrastructure.

A core strength of this model is standardization. Consolidating email tenants, unifying domains, and aligning network infrastructure allows portfolio companies to operate under a shared IT architecture that promotes visibility and collaboration. Over time, this reduces operational risk and enables smoother data sharing, compliance enforcement, and platform integration.

At the same time, flexibility remains critical. The right IT partner doesn't force a one-size-fits-all solution but adapts to the unique needs of each company. Whether a business requires a standalone environment or benefits from shared services across the portfolio, an experienced MSP can tailor solutions that align with short- and long-term goals—balancing autonomy with efficiency, and innovation with stability.

> In Private Equity, speed and precision matter, partnering with the right Managed IT provider bridges the gap between acquisition and operational excellence, turning technology into a catalyst for scalable growth, seamless integration, and accelerated returns.

SECTION 2

IT Standardization + Integration for PE

Streamlining systems across portfolio companies.

In the world of Private Equity, achieving operational efficiency and scalability across portfolio companies is essential for delivering returns.

One of the most effective ways to drive value is through standardized and integrated IT strategies. Rather than allowing each acquired company to maintain its own fragmented systems, PE firms can create a unified IT ecosystem that streamlines operations, accelerates onboarding, and improves long-term outcomes.

Standardization isn't about forcing a one-size-fits-all model

It's about creating a cohesive, flexible foundation that supports both individual company needs and overarching business goals. Whether consolidating email tenants for easier communication, optimizing infrastructure for better performance, or implementing shared cybersecurity protocols, a centralized approach reduces complexity and increases control.

When IT is unified across companies

Onboarding new acquisitions becomes smoother and faster. Costs become more predictable, vendors easier to manage, and performance easier to track. IT becomes a proactive force for growth instead of a reactive burden. By customizing strategies to fit unique business models while aligning technology decisions with broader PE objectives, firms unlock real economies of scale—and ultimately, better returns.

THE VALUE OF STANDARDIZED IT IN PRIVATE EQUITY COMPANIES.

ACCELERATED ONBOARDING AND INTEGRATION
A standardized IT playbook enables faster setup of new acquisitions, getting teams productive and aligned sooner.

CONSOLIDATED COMMUNICATION SYSTEMS
Merging email tenants and platforms improves collaboration, reduces confusion, and supports unified branding across the portfolio.

OPTIMIZED INFRASTRUCTURE
Centralizing and upgrading network environments improves performance, reduces downtime, and enhances security.

FLEXIBLE AND SCALABLE SOLUTIONS
IT models can be tailored to each company's unique size and structure while still aligning with the broader PE roadmap.

COST REDUCTION THROUGH SCALE
Standardization allows PE firms to negotiate better licensing terms, eliminate redundancy, and reduce operational overhead.

PROACTIVE AND STRATEGIC IT MANAGEMENT
Centralized support and consistent monitoring reduce risk, improve planning, and turn IT into a lever for growth and value creation.

CHAPTER 3

The Braver Advantage

The Future of IT in Private Equity—Why Braver Technology is the Preferred IT Partner for Private Equity Firms.

One Partner. Unlimited Potential.

The Power of a Centralized Managed Service Provider for the Private Equitity Firm Portfolio.

Private Equity firms are increasingly centralizing IT operations under a single Managed Services Provider and for good reason. Managing multiple portfolio companies demands uniformity, security, and scalability at every level. Partnering with one trusted MSP eliminates fragmentation, accelerates integration, and ensures consistent compliance across the board.

At Braver, we specialize in supporting Private Equity with nationwide coverage, 24x7 live help desk support, and flexible, customized solutions built around your acquisition strategy. Our centralized IT model bridges the gap between investment and operational excellence—streamlining daily support, enhancing cybersecurity, and delivering proactive technology management to keep every company in your portfolio running at peak performance.

CO-MANAGED IT + CUSTOMIZED FLEXIBILITY

Not every company in your portfolio has the same IT requirements, which is why our co-managed IT services offer the best of both worlds—supporting your internal IT staff or serving as a full-service outsourced solution. Whether you need us to run everything or simply supplement your existing resources, we'll customize a plan to fit your structure and goals.

- Collaborate with your in-house IT for enhanced coverage
- Fill in knowledge gaps or staffing shortfalls
- Flex support up or down depending on business needs
- Gain access to 24x7x365 help desk and infrastructure monitoring
- Eliminate downtime and maintain operational efficiency

STRATEGIC STANDARDIZATION & SCALABILITY

To compete in today's fast-moving market, you need an IT environment that's cost-effective, scalable, and designed to grow with your business. We help unify infrastructure across your portfolio companies—simplifying systems, optimizing workflows, and enhancing communication.

- Streamlined onboarding and system integration post-acquisition
- Cloud migration and infrastructure alignment
- Unified communications and VoIP solutions
- Website hosting, application development, and digital modernization
- Regular strategic reviews to align IT with your business goals

One Partner. Unlimited Potential.

SECURITY THAT NEVER SLEEPS

Cybercriminals don't keep business hours, and neither do we. Our layered cybersecurity approach keeps every endpoint, server, and user under constant protection with real-time monitoring and threat response. Whether it's preventing intrusions, stopping ransomware, or locking down remote access, Braver builds a hardened environment around your data and your business.

- 24x7x365 proactive threat monitoring
- Managed Detection & Response (MDR)
- Endpoint security and firewall management
- Patch management and vulnerability mitigation
- Incident response and disaster recovery planning

COMPLIANCE CONFIDENCE ACROSS YOUR PORTFOLIO

Compliance is more than just checking boxes, it's about protecting your reputation and reducing risk across all your companies. Our certified team ensures your technology is always aligned with the latest industry standards and government regulations. Whether you're navigating HIPAA, SOC 2, or other frameworks, we make audits painless and proactive.

- SOC 2-certified policies and procedures
- Risk assessments and documentation
- Audit prep and ongoing compliance management
- Regulatory alignment (HIPAA, CMMC, etc.)
- Secure data handling and privacy controls

ONE STOP IT SOLUTIONS FOR PRIVATE EQUITITY

Managing multiple portfolio companies requires consistency, security, and scalability across the board. Braver delivers comprehensive IT services through a centralized model designed specifically for Private Equity firms. From daily support to strategic guidance, our all-in-one approach ensures every business under your umbrella runs smoothly, securely, and efficiently.

MANAGED IT SERVICES

End-to-end IT support that includes 24x7 help desk access, infrastructure monitoring, system updates, and executive-level technology consulting to align IT with business goals.

CYBERSECURITY

Around-the-clock protection with our 24x7 Security Operations Center (SOC). Our proactive approach includes Managed Detection & Response (MDR), vulnerability scanning, compliance management, end user training and regular risk assessments.

CLOUD & INFRASTRUCTURE SERVICES

Robust cloud migration strategies, hybrid infrastructure optimization, and ongoing security management to create a reliable and scalable IT foundation.

SOFTWARE & APPLICATION DEVELOPMENT

Tailored software solutions to automate business processes, streamline operations, and improve productivity—designed to meet the unique needs of each portfolio company.

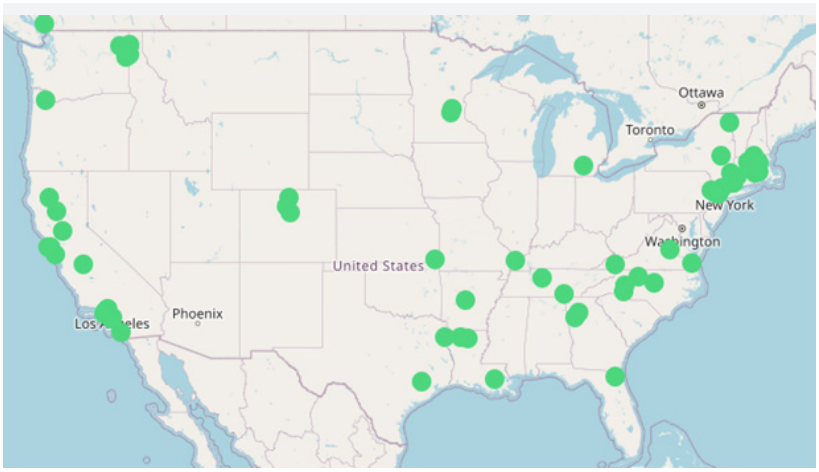
VOIP & UNIFIED COMMUNICATIONS

Modern, secure voice and messaging solutions that empower teams to collaborate efficiently across locations, platforms, and devices.

WEBSITE HOSTING AND DESIGN

Custom-designed websites backed by secure, high-performance hosting. We ensure responsive design, consistent uptime, and seamless digital engagement across all devices.

Local ‘Boots on the Ground’ with a Nationwide Presence



- Braver provides Managed IT services and solutiuons across the U.S., ensuring consistent support for all portfolio companies.
- Our “Boots on the ground” approach means local IT engineers are available whenever needed.
- We offer 24/7/365 IT support, guaranteeing rapid response times and proactive issue resolution.

Are we a fit...

Our clients operate in different industries and encompass a wide range of networks, systems, needs, and obstacles. We work very closely with our clients and spend the time adjusting, building, and perfecting their technology infrastructure. Working closely with each portfolio company to assess, design, and refine the technology infrastructure that supports their growth and integration goals.

We partner with firms that recognize technology as a driver of value creation. Our ideal clients are those ready to modernize, streamline operations, and eliminate inefficiencies through smart IT solutions. Whether it’s accelerating onboarding, strengthening security, or optimizing legacy systems, we’re committed to making IT an enabler—not a barrier—on the path from acquisition to long-term success.

Expertise in IT Integration for Mergers & Acquisitions

- Braver simplifies IT integration during M&A transitions, reducing downtime and risk.
- Our experts consolidate IT systems, ensuring smooth email tenant and domain unification.
- We develop IT roadmaps that align technology with business goals.

Customized IT Strategies for Each Portfolio Company

- Tailored IT solutions based on each company’s industry, size, and operational needs.
- Flexible network configurations: shared or separate systems depending on business requirements.
- Gradual IT consolidation strategies that minimize disruption.

Proven Success with Private Equity Firms

- Successfully implementing IT standardization across multiple industries and business models.
- Our proactive approach ensures a seamless transition to a unified IT framework.
- Provide ongoing strategic IT advisory services to help PE firms maximize technology investments.