

Fast and reliable expertise for US Private Equity firm looking at new wireless communications company in Asia

A Private Equity firm turned to Coleman for insights when they were considering moving forward with an investment deal in a new wireless communications company.

THE CHALLENGE

Closing the Knowledge Gaps

Kate is an investment analyst for a private equity firm currently managing more than \$15 billion in investment strategies. Kate handles private markets-related equity, real estate, infrastructure, and mezzanine lending, among other areas, and conducts due diligence related to her current deals.

Kate typically relied on secondary research when she initiated deals, but often encountered information gaps which made it difficult to make decisions with confidence.

Kate's firm turned to Coleman Research for immediate access to first-hand knowledge. After a review of various providers, it was clear that Coleman could better connect their analysts with the right experts to help them overcome information gaps, and verify their assumptions.

Recently, Kate was progressing on an investment deal in a new wireless communications company based in Asia. Her team heard conflicting information about the potential for the company's growth in that market.

In order to better evaluate this information and verify various assumptions, Kate reached out to Mike, her Client Manager at Coleman, with a request for consultations with five experts qualified to give her insight into the competitive landscape of the Asian wireless communications market, as well as growth projections for the industry.

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Coleman is speedy with their response and their client service is great. Mike [Client Manager] stays in constant contact with me to make sure that I get everything I need.

—Kate, Investment Analyst for a Private Equity Firm

THE SOLUTION

Speed & Dedicated Service

Within 24 hours, Mike sent Kate fifteen expert candidates, some of which were drawn from Coleman's existing network, others newly recruited for the project. Coleman vetted each of these experts over the phone to ensure that they were a good fit for her needs. Kate selected those she considered most relevant and then Coleman's call scheduling team arranged seven calls for her that week.

Mike and his team delivered the speed and breadth of expertise that Kate's investment deal required, and were responsive and proactive about ensuring Kate's project ran smoothly. Ultimately, Kate was able to increase confidence in her decision not to move forward with the investment.

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I think Coleman's biggest strengths are speed of delivery and the fit of the experts. The turnaround time is less than one day, and I've personally been very happy with the experts that I've received.

—Kate, Investment Analyst for a Private Equity Firm

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It is very important that we collect as much information as possible about our clients and their projects. This allows us to quickly respond to project requests and offer a service that is superior to our competitors.

—Mike, Coleman Client Manager

THE RESULTS

Relevant Knowledge Delivered Fast

Coleman's work behind the scenes enabled Kate to feel comfortable with the pace of her project, the relevance of the experts, and the value of her expert consultations. With Coleman, Kate and her colleagues gained valuable insights that helped them make a more informed decision.

Kate's two main priorities are turnaround speed and expert fit, especially when she or her team encounters an unfamiliar industry or company.

Part of Kate's process when working on a deal involves discussing it with company-internal advisors, management teams, and colleagues who are actively involved in the deal. By teaming up with Coleman, Kate gains unique perspective by stepping back and discussing the bigger picture or diving deeper with qualified outside experts.

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I've used some of their competitors in my work here, but I honestly prefer to work with Coleman. I use Coleman more often than the others.

—Kate, Investment Analyst for a Private Equity Firm