

PROFESSIONAL SERVICES TRANSFORMATION

Transforming a Professional Services Organization Across Multiple Acquisitions

How an operator-CEO unified a fragmented PS org across five acquisitions — doubling win rates, lifting margins 12 points, and building an operating system that scaled without heroes. Unified proposal process deployed by week 8; first win under new system by week 12.

2x WIN RATE	-40% TIME TO CLOSE	+12 pts PS MARGINS	+21 pts CLIENT NPS	+23 pts EMPLOYEE ENPS
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THE SITUATION

A PE-backed national managed services provider had acquired five companies in two years — MSP, PS firm, nearshore engineering, cybersecurity, and managed services. Revenue grew, but the PS org was running five different playbooks with no integration.

- Five acquired teams, five proposal processes, zero consistency
- Scope creep and rework were the norm — requirements gathering was ad hoc
- Margins eroding: teams underpriced to win deals, then over-delivered
- Win rates well below industry benchmarks; sales cycles dragging
- Top performers leaving — morale dropping as clarity evaporated

THE APPROACH

The initial assumption was a training problem — teams just needed upskilling. The Five Whys revealed the issue was structural: five entities, five processes, zero integration. The CEO brought in B Street Advisors as a specialized PS partner, operating under KeyDelta's VOOCs execution framework:

- 1 Discovery & Baseline**
Diagnostic across all legacy entities. Mapped every process from lead-to-close. Identified heroes, gaps, and competing methodologies.
- 2 Design & Standardize**
Unified proposal process end-to-end: requirements gathering, solution architecture, value-based pricing, and a consistent value proposition.
- 3 Implement & Operate**
New processes deployed, teams retrained, cadence installed (weekly pipeline reviews, monthly PS metrics), ownership defined at every stage.
- 4 Measure & Scale**
KPIs established. Dashboards and accountability rhythms built to survive leadership changes.

THE RESULTS — 12 MONTHS

WIN RATE 22% → 45% More than doubled	TIME TO CLOSE 68 → 40d 40% faster cycle	PS MARGINS 24% → 36% +12 pts value pricing	UTILIZATION 61% → 78% Reduced bench time	CLIENT NPS 31 → 52 Consistent delivery	EMPLOYEE ENPS 18 → 41 Clarity + career paths
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THE VOOCs LENS — BUILDING THE SYSTEM THAT SURVIVED LEADERSHIP CHANGES

V VISION One company, one value proposition — differentiated by engagement, not legacy entity.	O OUTCOMES Measurable KPIs from day one. Every process change tied to a metric.	O OWNERSHIP Every lifecycle stage got a single owner with decision authority.	C CADENCE Weekly reviews + monthly scorecards. Problems visible before crises.	S SCALE Playbooks and templates. The system worked without any single person.
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“This wasn’t a consulting engagement — it was an operating system install. We didn’t just improve metrics. We built a PS organization that runs without heroes.”

— CEO, PE-BACKED NATIONAL MANAGED SERVICES PROVIDER