SilverTree

BUSINESS MODERNIZATION CASE STUDY

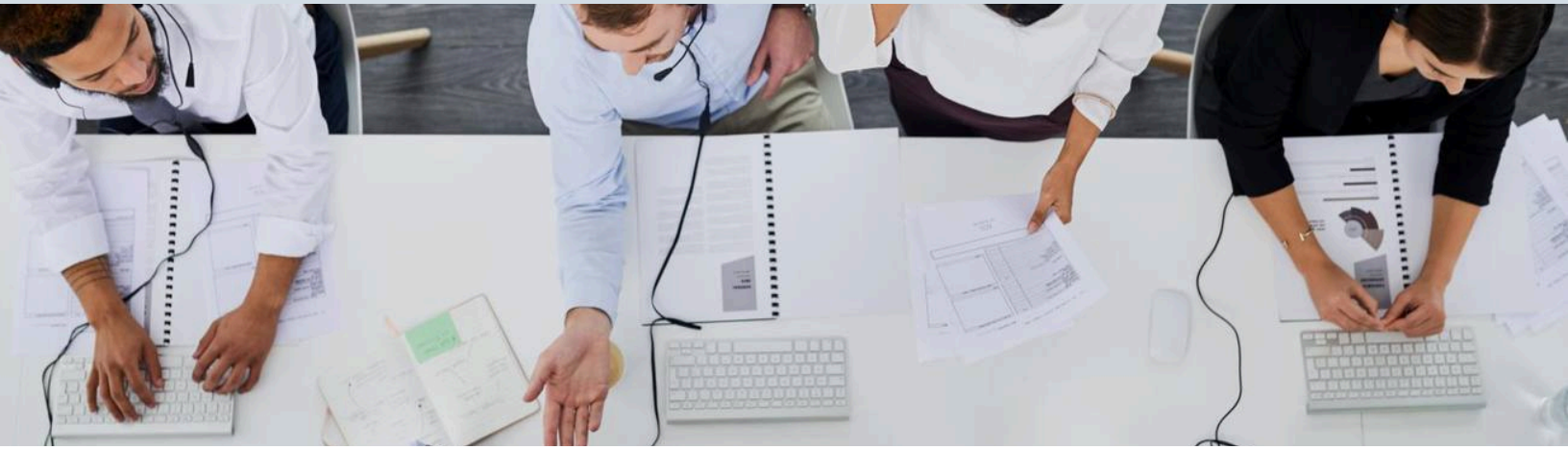
# Consultant-led assessments enable cost savings and strategic clarity for a PE-backed midmarket tech company

**INDUSTRY**
Products & Services

**COMPANY SIZE**
Midmarket (private equity-backed)

**SERVICE / SOLUTION**
Business Modernization Consulting

**ENGAGEMENT MODEL**
Assessments & Consulting
Program Management as a Service
Project Management



## The challenge

When a new CEO joined this private equity-backed midmarket company, he had to quickly identify $23 million cost savings that could be injected into board-identified business areas. To achieve the board's aggressive goal, he needed a strategic partner to identify opportunities for cost savings, process optimization, and operational improvements across his company.

He turned to Silver Tree to assess critical business and IT functions. Silver Tree provided actionable roadmaps, advisory, and program and project management expertise, laying the foundation for savings and business innovation.

OUTCOMES

**$6M+**
Potential cost savings surfaced across IT and operations initially

**$23M**
Prioritized transformation roadmap aligned with the board's cost-savings and reinvestment goals

**Reinvested**
Savings redirected into strategic growth and innovation initiatives

## Why Silver Tree

Silver Tree's approach to conducting assessments, cross-functional engagement style, and clear communication turned initial discovery work into a lasting strategic partnership.

Additionally, Silver Tree's ability to surface actionable insights and translate them into value-driven programs and strong project management helped the CEO identify cost savings dictated by the board and allowed the company to shift capital to high-priority strategic initiatives.

> **Silver Tree became more than a consultant. They became a trusted advisor who could be counted on to bring clarity, structure, and momentum to transformation initiatives.**

## Actions taken

Silver Tree's tailored assessments, consultative approach, and project management expertise enabled the client to:

- **Prioritize cost-saving opportunities:** Recognize cost savings by optimizing service delivery, infrastructure spending, and support models, using a detailed, measurable roadmap for improvement.
- **Accelerate execution of strategic initiatives:** Hands-on project management and executive-level support ensured alignment and momentum.
- **Uncover cost savings and efficiency:** Recommendations identified opportunities to consolidate contracts and optimize third-party spending.

YOUR NEXT STEP

## See how Silver Tree can do the same for you

Book a complimentary 30-minute Advisory Session with a Silver Tree leader. We will look at the challenges you are facing and show how we can deliver results like these for your organization.

Book an Advisory Session

info@silvertreeservices.com

## About Silver Tree

Founded in 2014 by Richard Ricks, Silver Tree Consulting & Services is an IT solutions and services integrator. We help midmarket companies unravel complex technology challenges, improve operational effectiveness, and unlock growth potential.

Our six practices, AI, data and intelligent operations, IT operations, security operations, business applications, and governance and management, are delivered through three service models: workforce solutions, solution consulting, and managed services.



©2026 Silver Tree Consulting & Services. Confidential and proprietary. All rights reserved.