

Set for Investment Onboarding **Portfolio Onboarding in 90 Days**

Data & Software · Finance & Investment · Strategy & Execution





Companies using **data-driven KPIs**
grow 23% faster. – FT

Operational improvement has become the
key lever for exit **multiple expansion.** – pwc

Agenda

> Introduction

Novemcore „Set for Investment Onboarding“ Process

- > 30 Days - Transparency  **VALUEWORKS**
INSIGHTS TO RESULTS
- > 60 Days - Efficiency    **PULSE**
- > 90 Days - (Digital) Value Creation

Introduction



Julian Molitor, CFA
Founder | Novemcore

Vorher tätig bei:

strategy&
Part of the PwC network

**Roland
Berger**

KPMG

valantic

BARCLAYS

pwc

Expertise:

Specialized at the intersection of corporate finance, transactions, and data-driven value creation.

Experience:

Extensive track record in guiding transactions and implementing performance-oriented growth strategies.

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About Novemcore



We are **your partner for investment and business success**. 100% aligned with your objectives.

At the intersection of **finance, technology, and execution**, we turn complexity into clarity and ambition into results.

We don't just advise. We **design, implement, and deliver**.



Julian Molitor, CFA
Founder | Novemcore



50+ due diligences



80+ subject experts



10+ years avg. experience

Our distinct service offerings ensure you are **set for...**

... deal success

Spot risks · Streamline valuation ·
Unlock returns

More



50+ due
diligences

... investment onboarding

Standardize reporting · Streamline
setup · Unlock potential

More



80+ subject
experts



10+ years avg.
experience

... portfolio return

Streamline controlling · Ensure
transparency · Drive returns

More



Finance, tech, tax
& legal expertise



Results-based
compensation

... future trends

Leverage data · Track shifts ·
Outperform consistently

More



Selective Transactions Experience

EGERIA
implico®

STAUFEN.
accenture



cerberus
Hamburg Commercial Bank

cerberus
NORD/LB

e-on
igneo

CINVEN
Anonymous

NCA
NOWSTONE
CAPITAL
ADVISORS

BARCLAYS
JCBancassurance OUTFRONT

Selective Value Creation Experience



CNC24

Bentley®



altman solon



SOPHIENKLINIK

MEDIFOX DAN
by ResMed



Boehringer
Ingelheim

citi

UNIVERSITÄTSKLINIKUM
AUGSBURG



CLOUDYRION

Verbund
Pflegehilfe

Deutsches
Taubblindenwerk

Agenda

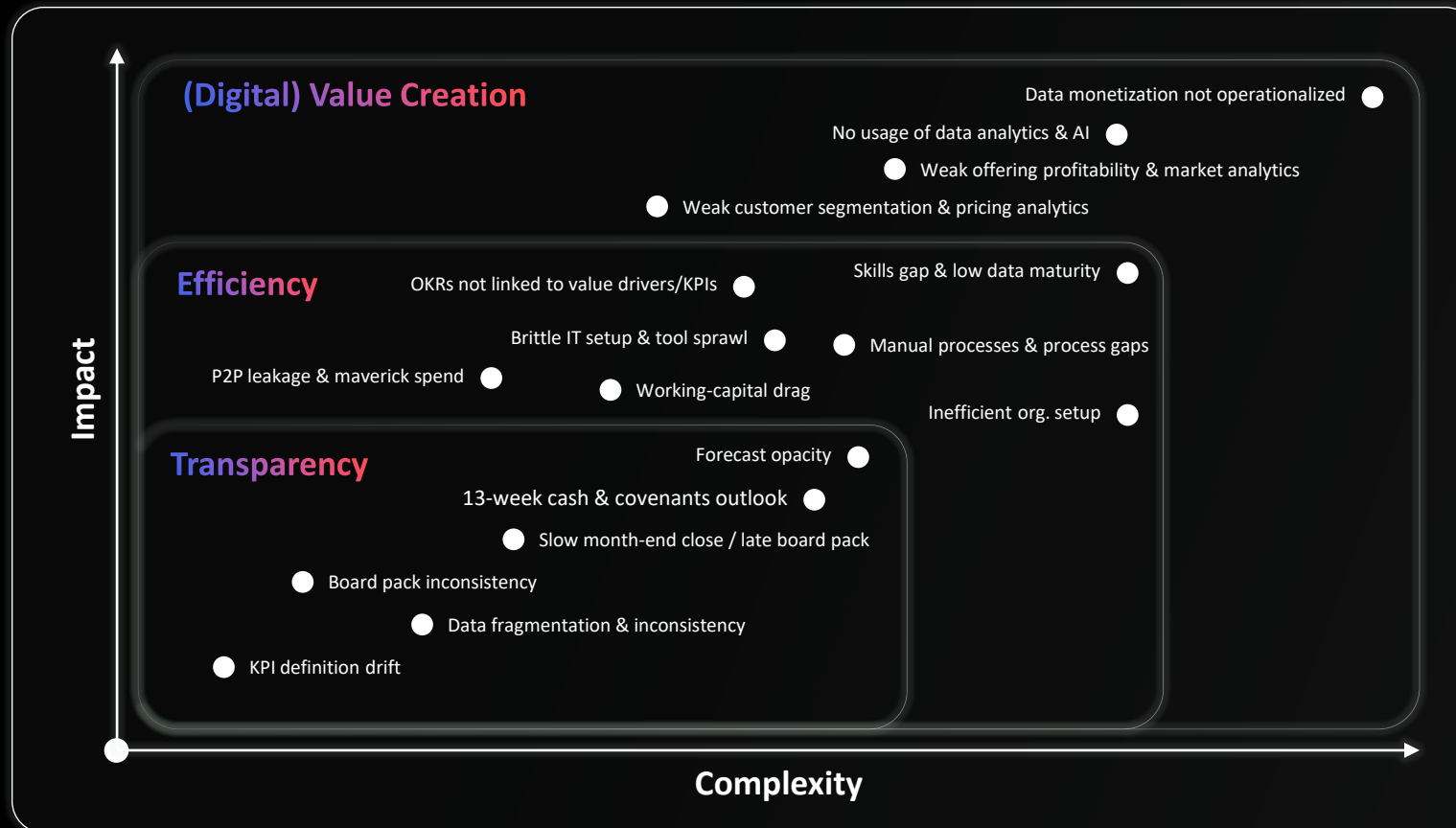
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Novemcore „Set for Investment Onboarding“ Process

- > 30 Days - Transparency + **VALUEWORKS**
INSIGHTS TO RESULTS
- > 60 Days - Efficiency + **AI Inside**
[N]ovemcore | **PULSE**
- > 90 Days - (Digital) Value Creation

Clear indication of pain points is essential for effective investment onboarding.

Pain Point Matrix (focus on the most frequent)



Transparency

Lack of unified, consistent, and timely **data** creates **uncertainty in decision-making**. Fragmented systems, inconsistent KPI definitions, and delayed reporting **erode visibility into performance**, cash flow, and covenant compliance. Establishing a **single source of truth** and ensuring timely, accurate reporting is **essential**.

Efficiency

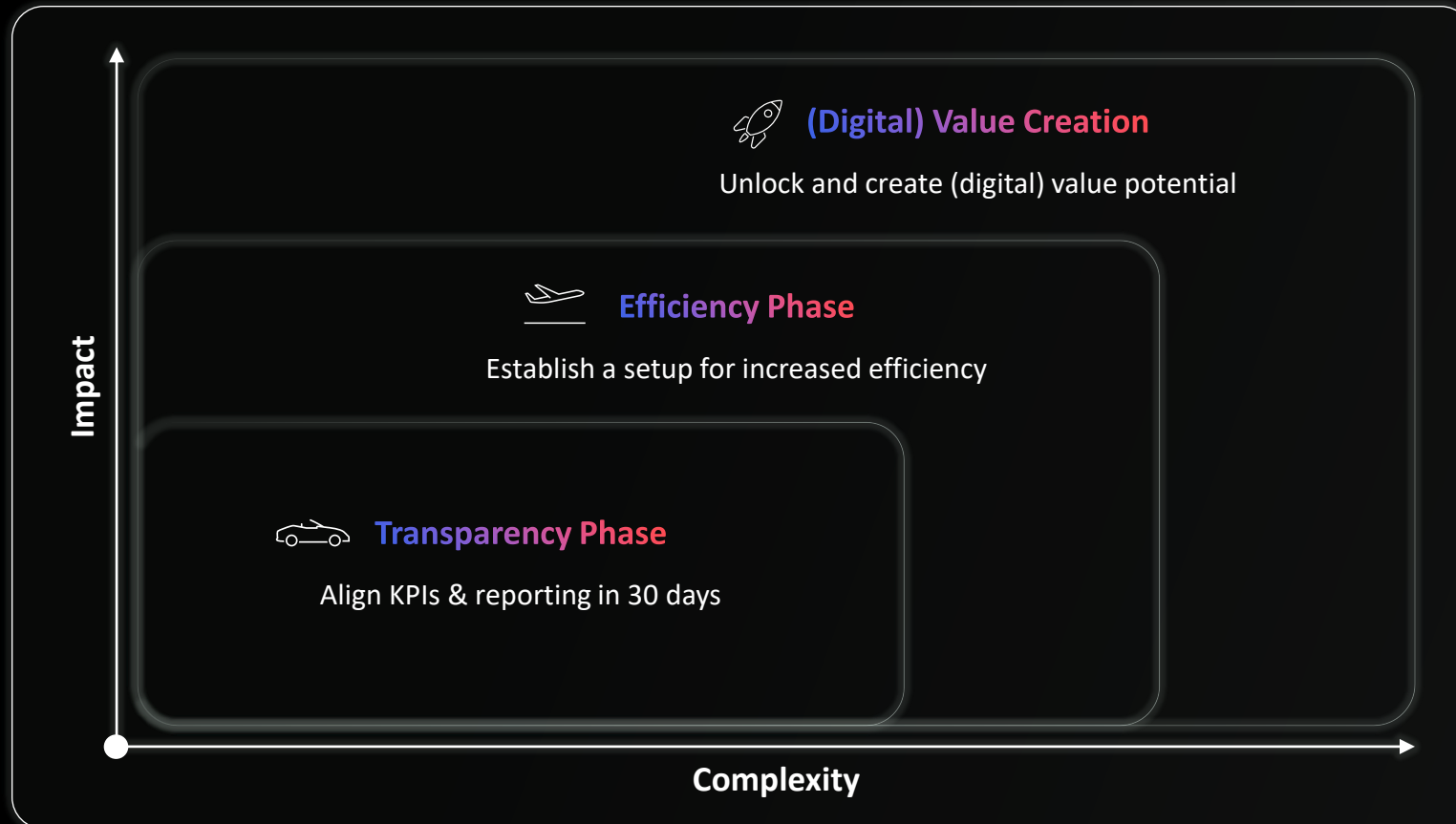
Operational friction and **resource waste** stem from disconnected tools, manual processes, and unclear performance alignment. Skills gaps, inefficient organizational setups, and working-capital drag **hinder speed and scalability**. **Streamlined processes, automation, and KPI-linked objectives** are key to **driving efficiency**.

(Digital) Value Creation

Untapped data potential and weak analytical capabilities limit growth. Missing operationalization of AI, poor customer segmentation, and underdeveloped profitability analytics **prevent monetization opportunities**. Embedding digital tools, advanced analytics, and **data-driven decision-making** unlocks **scalable value creation**.

In a structured 30-60-90 days onboarding plan, the key pain points are addressed.

Onboarding Matrix



30-60-90 Days Onboarding Phases

30 Days - Transparency

Define consistent KPIs, automate reporting, and deliver a clear playbook for full visibility.



Reporting
playbook



KPI setup &
automation



Flash reports &
integration

VALUEWORKS
INSIGHTS TO RESULTS

60 Days - Efficiency

Spot inefficiencies with our PULSE analysis, launch quick wins, and link value levers to OKRs.



PULSE Process
Analysis



Performance
Scorecards



Value Creation
& OKR Setup

90 Days - Value Creation

Set IT roadmap, automate key processes, and plan data monetization.



IT setup
roadmap



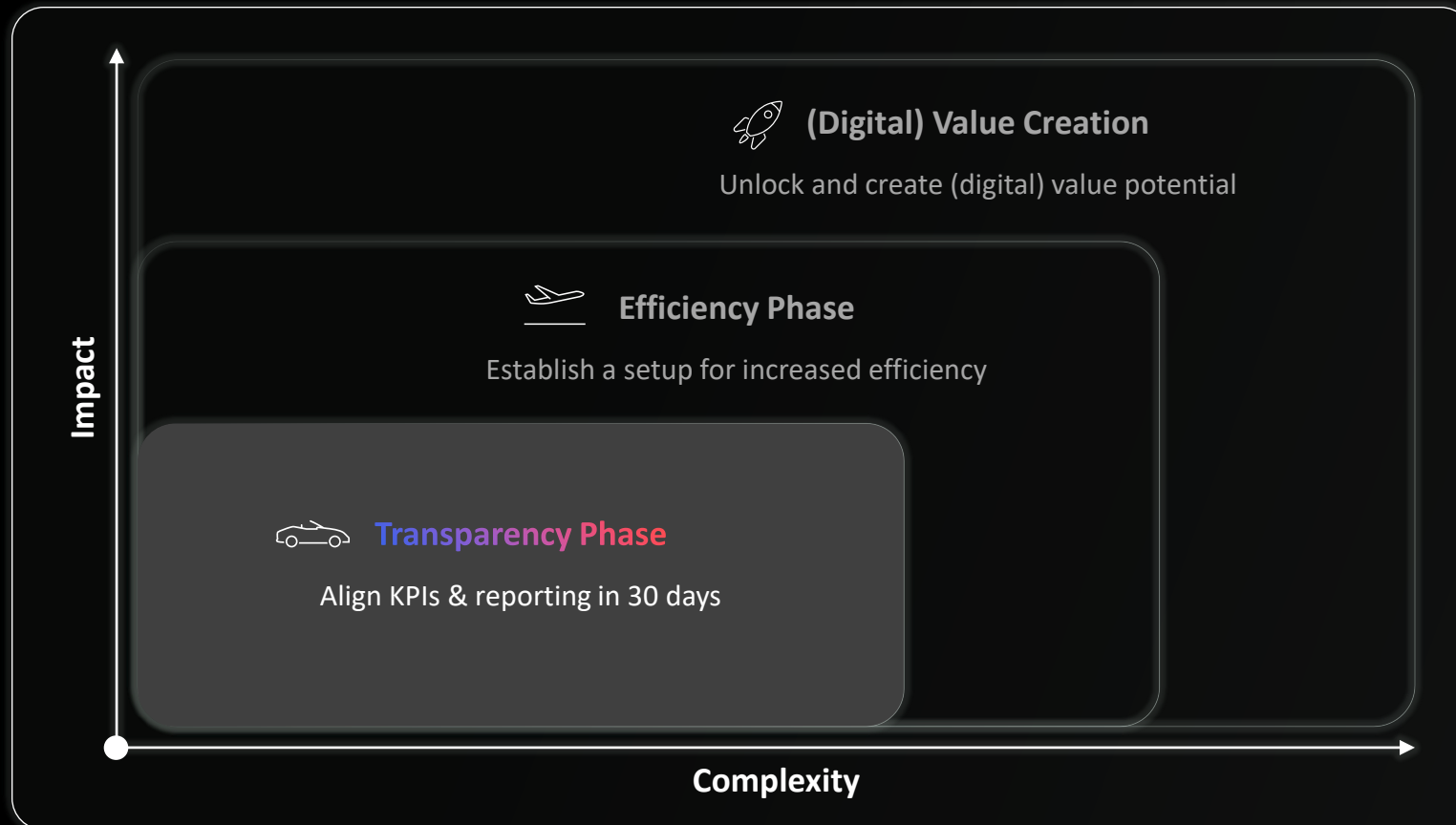
Process auto-
mation plan



Data monetization
strategy

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IT setup
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Process auto-
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Data monetization
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In the first seven days, the focus is on aligning the reporting setup and KPIs.

Day 1 - 7

Reporting play book alignment

✓ Clear reporting requirements

Define scope, frequency, audience; mandatory views (P&L, cash/13-week, WC, sales/pipeline); materiality limits, deadlines, sign-off flow.

✓ Joint agreement of relevant KPIs

Select 15–25 core KPIs balancing business reality and portfolio comparability; lock formal definitions and board-pack placement.

✓ Path on how KPIs can be tracked

Confirm data availability; set interim proxies if needed define quality checks.



Reporting
playbook



Performance
Scorecards

Continuous alignment:

Workshops

Bilaterally

For

Reporting Playbook – Impact Factors (Days 1–7)

- **Scope & cadence:** Lock what we report, to whom, and when (financials, 13-week cash, WC, sales/pipeline); agree cut-off & materiality rules.
- **KPI logic:** Define a concise core KPI set with exact formulas, data grain, source-of-record, targets/baselines, and named owners.
- **Data & aggregation:** Map source systems; set consolidation, intercompany and FX rules; document master-data fields.
- **Board-pack standard:** Fix the structure (sections, visuals), variance logic (vs. budget, prior, run-rate) and commentary expectations.
- **Ownership & handoffs:** Clarify who prepares, reviews, approves; deadlines for submissions; change-control for any metric or layout edits.
- **Acceptance:** KPI dictionary signed off; board-pack skeleton approved; first flash cadence defined; 13-week cash model defined.
- **Early red flags to remove:** Conflicting metric definitions, spreadsheet-only consolidation, missing master data, ad-hoc commentary.

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Performance
Scorecards



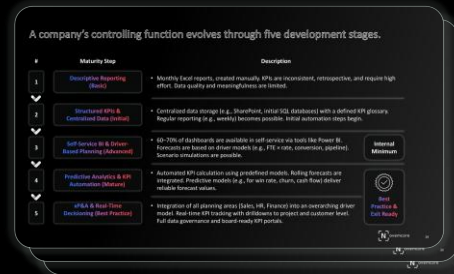
Continuous alignment:

Workshops

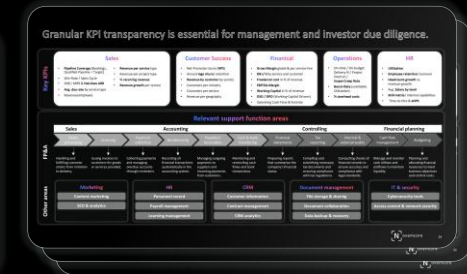
Bilaterally

For

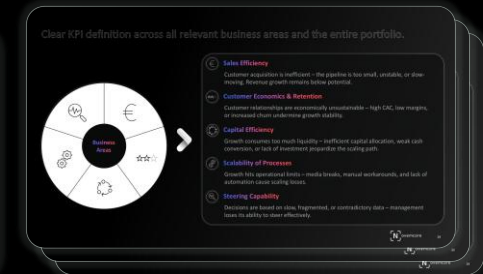
Reporting Playbook



#1: Requirements Definition



#2: KPI Definition



#3: Setup Outline

Performance Scorecards

Performance scorecards provide a structured, **at-a-glance view of key metrics**, combining **financial** and **operational KPIs** to track progress against strategic goals, ensure accountability, and enable data-driven decision-making across the portfolio.



In the second and third week, an automated reporting setup is implemented.

Day 1 - 7

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Reporting
playbook



Performance
Scorecards

Day 8 - 21

Reporting setup automation

- ✓ **Clear aggregation logic across PortCos & BUs**
Define standard hierarchies (entity/ Bu/ product/ region), consolidation rules, and versioning for Actual/Budget/Forecast.
- ✓ **Clear responsibilities and format of reporting**
Set RACI for collect → transform → approve, monthly timeline, naming/ version rules, fixed board-pack template with commentary logic.
- ✓ **Automation of reporting setup**
Automate pipelines & refresh, embed KPI formulas, apply data-quality gates & alerts, enable role-based access.



VALUEWORKS
INSIGHTS TO RESULTS



KPI & Reporting
Setup

What “Good” looks like

- **Embedded KPI logic.**
KPI formulas and drivers live in the model - no side calculations.
- **Quality & reconciliation.**
Run required checks and reconcile general ledger and subledgers; log exceptions.
- **Versions & variances.**
Align Actual / Budget / Forecast versions and use fixed variance rules (vs. budget, prior year, run-rate).
- **Data contracts.**
For every dataset / KPI, define system of record, refresh frequency, responsible owner, and traceable lineage.
- **Scheduling & service levels.**
Automate refresh and board-pack generation with clear response times for resolving data issues.

Continuous alignment:

Workshops

Bilaterally

Forms

Investor/ Fund-Side

CEO / Board

CFO / Head of F

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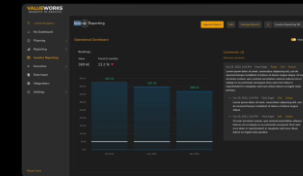
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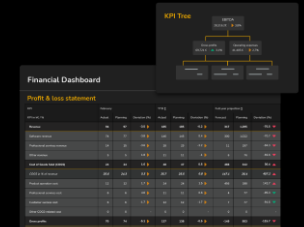
What “Good” looks like

A best practice automated reporting setup should cover all levels and stakeholder groups

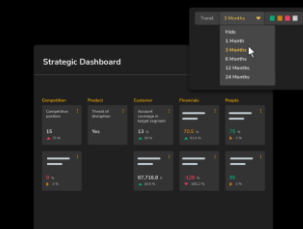
VALUEWORKS
INSIGHTS TO RESULTS



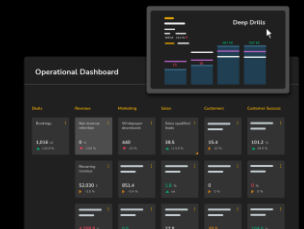
Investor
Dashboard



Finanzielles
Dashboard



Strategisches
Dashboard



Operatives
Dashboard

Continuous alignment:

Workshops

Bilaterally

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In the last week of the 30 days phase, final reporting deliverables are created.

Day 1 - 7

Reporting play book alignment

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VALUEWORKS
INSIGHTS TO RESULTS



KPI & Reporting
Setup

Day 22 - 30

Flash reports and integration

- ✓ **Flash cadence live**
Establish a consistent monthly and weekly flash process to deliver timely performance insights and enable early corrective actions.
- ✓ **Go-live & handover**
Ensure the finance team can independently run reporting, with clear ownership, locked templates, and stable processes in place.
- ✓ **Exec alignment & next 60 days**
Align leadership on initial results, validate key priorities, and approve the roadmap for the upcoming efficiency phase.



Flesh & regular
reporting

Continuous alignment:

Workshops

Bilaterally

Forms

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CEO / Board

CFO / Head of Finance & Controlling

BU / Ops Leads

IT / Data Mgmt.

First 30 days: Building a unified, KPI-driven reporting for portfolio success.

Day 1 - 7

Reporting play book alignment

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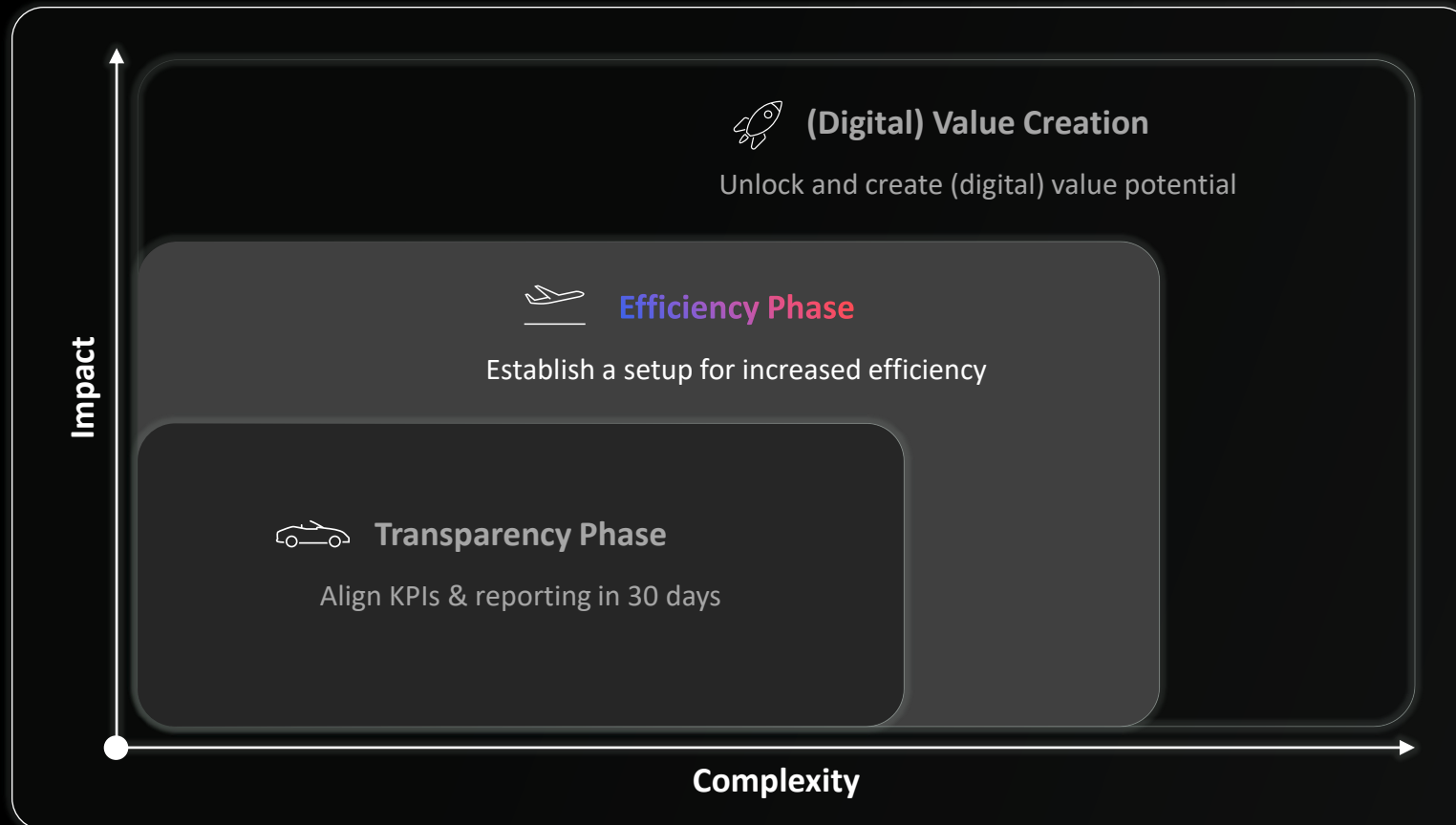
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90 Days – Value Creation

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IT setup
roadmap

Process auto-
mation plan

Data monet-
ization strategy

Day 30–60: Conducting a KPI and process analysis to unlock efficiency gains.

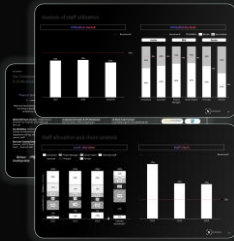
Day 31 - 38

KPI Analysis & Benchmark

Benchmark KPIs vs. peers and history to surface performance gaps and best-practice targets.



Performance Benchmark



AI Inside

PULSE

360° Process Review

AI-driven assessment via surveys, chatbots, and interviews to map.

Interviews & Chat Inputs

Structures Surveys

Day 38 - 52

Efficiency Improvement Assessment

Quick-Win Screening

Status Quo Check

Structured review to identify levers in IT setup, org, processes, skills, cost, and key-person risk.

IT Setup

Organizational Setup

Process Gaps

Skills Gaps

Process Cost

Key Person Risk

Day 53 - 60

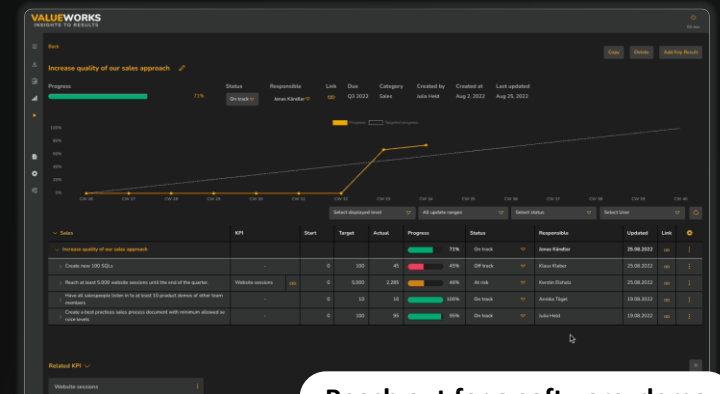
Efficient OKR Setup

Define objectives and key results to deliver quick wins; deploy via Excel or integrated BI tools.

OKR ID	Objective	Key Result 1	Key Result 2	Key Result 3	Status	Owner	Start Date	End Date
OKR-001	Improve customer satisfaction	Score of 4.5 or higher	Reduce complaints by 20%	Implement new feedback loop	In Progress	John Doe	2023-01-01	2023-03-31
OKR-002	Optimize internal processes	Reduce cycle time by 15%	Automate 3 manual tasks	Conduct process audit	Not Started	Jane Smith	2023-02-01	2023-04-30



VALUEWORKS
INSIGHTS TO RESULTS



Reach out for a software demo

PULSE: An AI-enable assessment to identify efficiency potential and prioritise levers.



Steps

Description

AI-Driven Input Collection

Capture **complete, standardised inputs** via structured forms, **AI chat prompts**, and process catalogues—ensuring **consistency, comparability**, and stakeholder alignment.



Concept-based and AI-enabled analysis

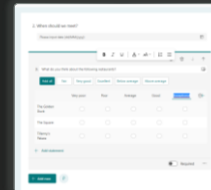
Apply **proven frameworks** and AI algorithms to **map transparency gaps**, key person dependencies, and **process/IT weaknesses**—prioritised for materiality and impact.



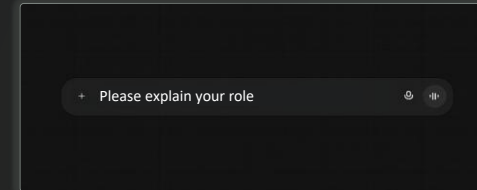
Human and AI-enabled conclusions

Integrate AI insights with **expert judgement** to deliver a **focused roadmap**—highlighting **quick wins**, quantified **value potential**, and ranked risks.

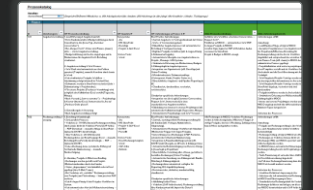
PULSE Process Analysis Results



Structured Input



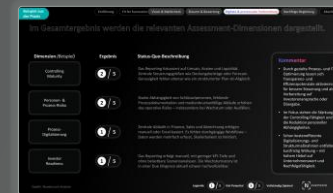
Interactive AI Prompt Capture



Process Map



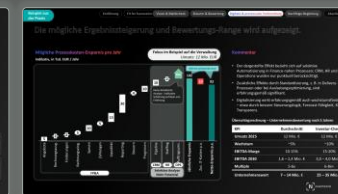
Performance Scorecards



Process & IT Gap Analysis

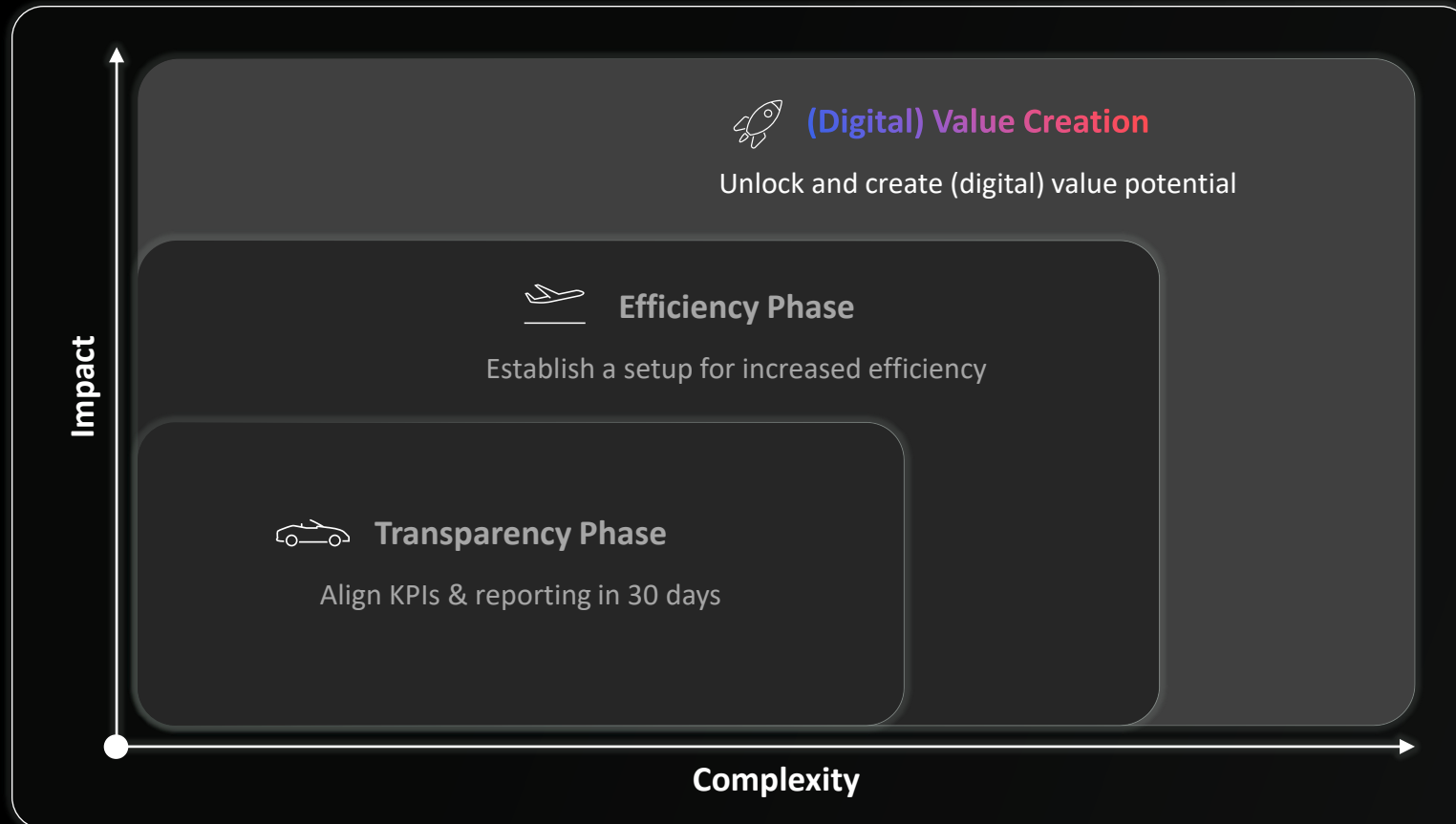


Value Creation & OKR Setup



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IT setup optimization starts with clear requirements definition...

IT Setup Optimization

Software Setup
Enhancement

System
Integration

Process
Automation

Data Value Monetization

Data Usage
Enhancement

Data
Productization

Data
Monetization

Day 61 - 67

Day 68 - 82

Day 83 - 90+

Assess software needs across core and support functions, leveraging prior process analysis. **Conduct targeted deep-dives** to identify functional gaps and **define enhancement priorities**.

Function areas

IT setup roadmap

Core

Sales / Revenue

Drive top-line growth through lead management, opportunity tracking, quoting, contract execution, and revenue forecasting with integrated CRM and analytics tools.

Customer Success

Ensure retention and upsell potential via onboarding, account health monitoring, support ticketing, and feedback loops powered by customer experience platforms.

Operations

Optimize service or product delivery by integrating resource planning, scheduling, inventory management, and workflow automation into a unified system.

Key support function areas

FP&A

Sales

Order processing

Accounting

Invoicing

Payment collection

Bookkeeping

Payables/receivables

Cash & bank monitoring

Controlling

Financial statements

Tax reporting

Internal & external audits

Financial planning

Cash flow management

Budgeting

Other areas

Marketing

Content marketing

SEO & analytics

HR

Personnel record

Payroll management

Learning management

CRM

Customer data management

Contract management

CRM analytics

Document management

File storage & sharing

Document collaboration

Data backup & recovery

IT & security

Cybersecurity tools

Access control & network security

... and end with seamlessly integrated automation across system components.

IT Setup Optimization

Data Value Monetization

Software Setup Enhancement

System Integration

Process Automation

Data Usage Enhancement

Data Productization

Data Monetization

Day 61 - 67

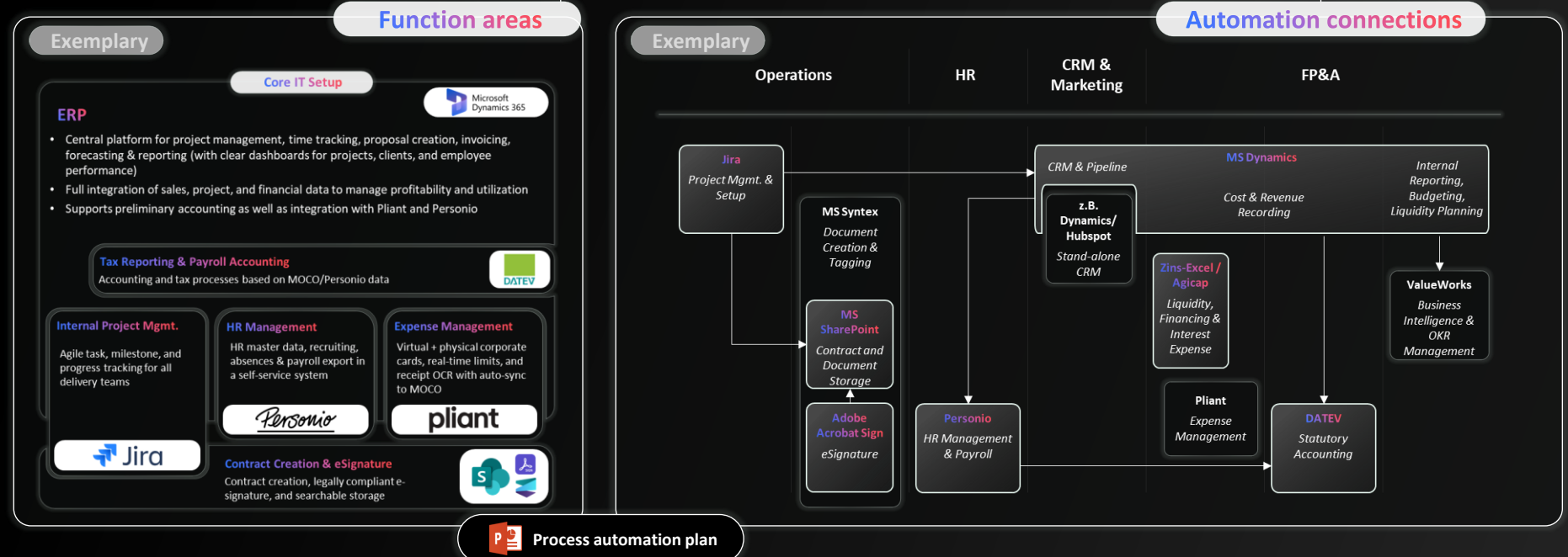
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Day 68 - 82

Address the **most critical enhancement areas** and determine the optimal integration architecture. Evaluate **best-fit software** alternatives based on scalability, interoperability, and ROI.

Day 83 - 90+

Deploy **process automation** leveraging implemented and planned solutions. **Integrate common automation tools** to streamline workflows and enhance operational efficiency.



Novemcore has designed a clear, seven-step framework for data value monetization.

IT Setup Optimization

Software Setup
Enhancement

System
Integration

Process
Automation

Data Value Monetization

Data Usage
Enhancement

Data
Productization

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Day 61 - 67

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Day 83 - 90+

#1: Value-Vision Works

- Align on business goals, data opportunities, and success KPIs
- Map existing data sources, constraints, and priorities
- Identify high-impact use cases with clear business value

The Data Vision Workshop provides as jumpstart unlocking your data's full potential.

Category

Scope of Services

Your results

Preparation

- Structured data asset inventory using the Novemcore Data Value Questionnaire
- 3 insight sessions: (1) Best practices for data-driven value creation, (2) Building a scalable data architecture, (3) Turning data into measurable ROI
- Development of tailored workshop topics & materials, aligned with your industry and business objectives

Data Value & Inventory Questionnaire

Insight Presentations

Execution

- 1-day workshop (on-site or virtual)
- Moderation outcome-focused methodology to identify high-value data assets, monetization opportunities, and quick wins
- Full digital documentation of the day's outcomes (photos, screenshots, notes, derived action items)

Workshop Documentation

Follow-up

- Results presentation (PDF) including: (1) Data value map & monetization strategy, (2) KPI framework, (3) Implementation roadmap with system & process recommendations
- Effort estimation (Excel) for implementing identified data value levers

Data Value Map & KPI Framework

Action Plan & Cost Estimation

Our Offer

You decide
based on results

Result below expectations

2.500 €

-50%

Fully satisfied

5.000 €

Basis

Expectations exceeded

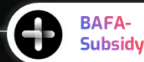
6.000 €

+20%

No recognizable value

0 €

-100%



Maximum impact. Minimal risk. You only pay for convincing results.

Novemcore has designed a clear, seven-step framework for data value monetization.

IT Setup Optimization

Software Setup
EnhancementSystem
IntegrationProcess
Automation

Data Value Monetization

Data Usage
EnhancementData
ProductizationData
Monetization

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Day 83 - 90+

#1: Value-Vision Works

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- Identify high-impact use cases with clear business value

#2: Data Value Quick Scan

- Rapid maturity and potential assessment (Availability, Usage, Quality)
- Calculate Data Leverage Index & Monetization Value Index
- Benchmark vs. peers and identify quick-win opportunities

Novemcore's Data Monetization Framework

Data Leverage Index (DLI)

- Data Availability
- Data Usage
- Data Quality



Data Availability, Usage, Quality Analysis
Novemcore Model

X

Data Value Factor (DVF)

- Monetary Value Index
- Regulatory Freedom
- Uniqueness

Vergleichstabelle der Datenbewertungsmethoden

Kriterium	Novemcore DLI	Novemcore DVI	Novemcore DVF	Novemcore DME
Verfügbarkeit	Hohe Verfügbarkeit	Hohe Verfügbarkeit	Hohe Verfügbarkeit	Hohe Verfügbarkeit
Verwendung	Hohe Verwendung	Hohe Verwendung	Hohe Verwendung	Hohe Verwendung
Qualität	Hohe Qualität	Hohe Qualität	Hohe Qualität	Hohe Qualität
Monetarisierung	Hohe Monetarisierung	Hohe Monetarisierung	Hohe Monetarisierung	Hohe Monetarisierung
Regulatorik	Hohe Regulatorik	Hohe Regulatorik	Hohe Regulatorik	Hohe Regulatorik
Einzigartigkeit	Hohe Einzigartigkeit	Hohe Einzigartigkeit	Hohe Einzigartigkeit	Hohe Einzigartigkeit

Data Valuation
Novemcore Approaches

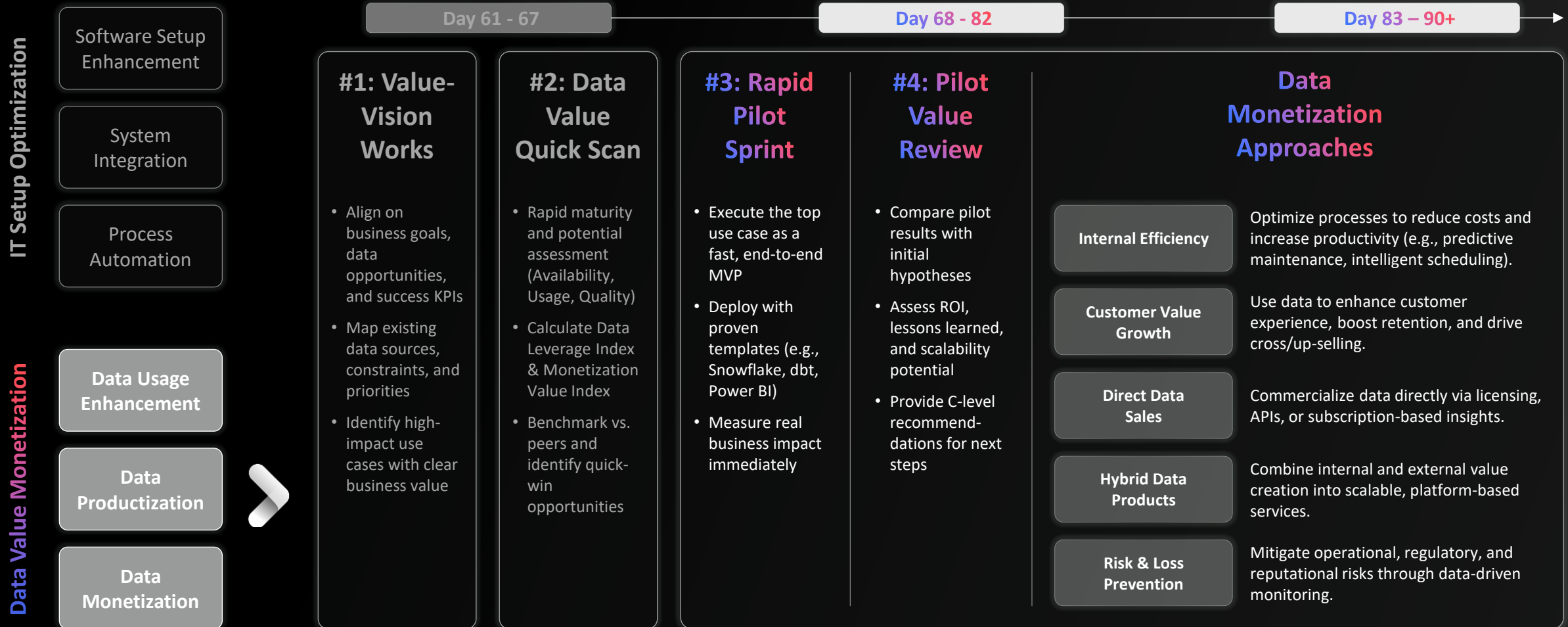
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Data Monetization Effectiveness (DME)

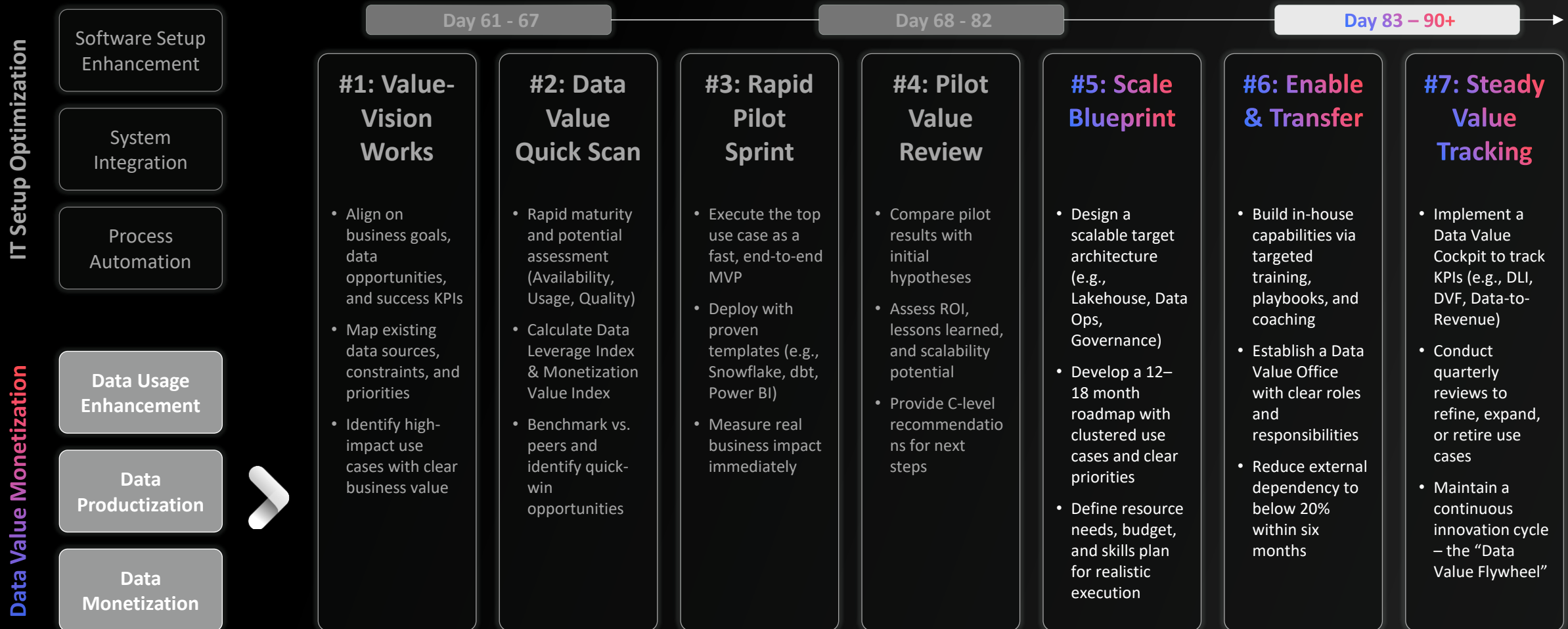


Data Monetization Whitepaper
On our Website

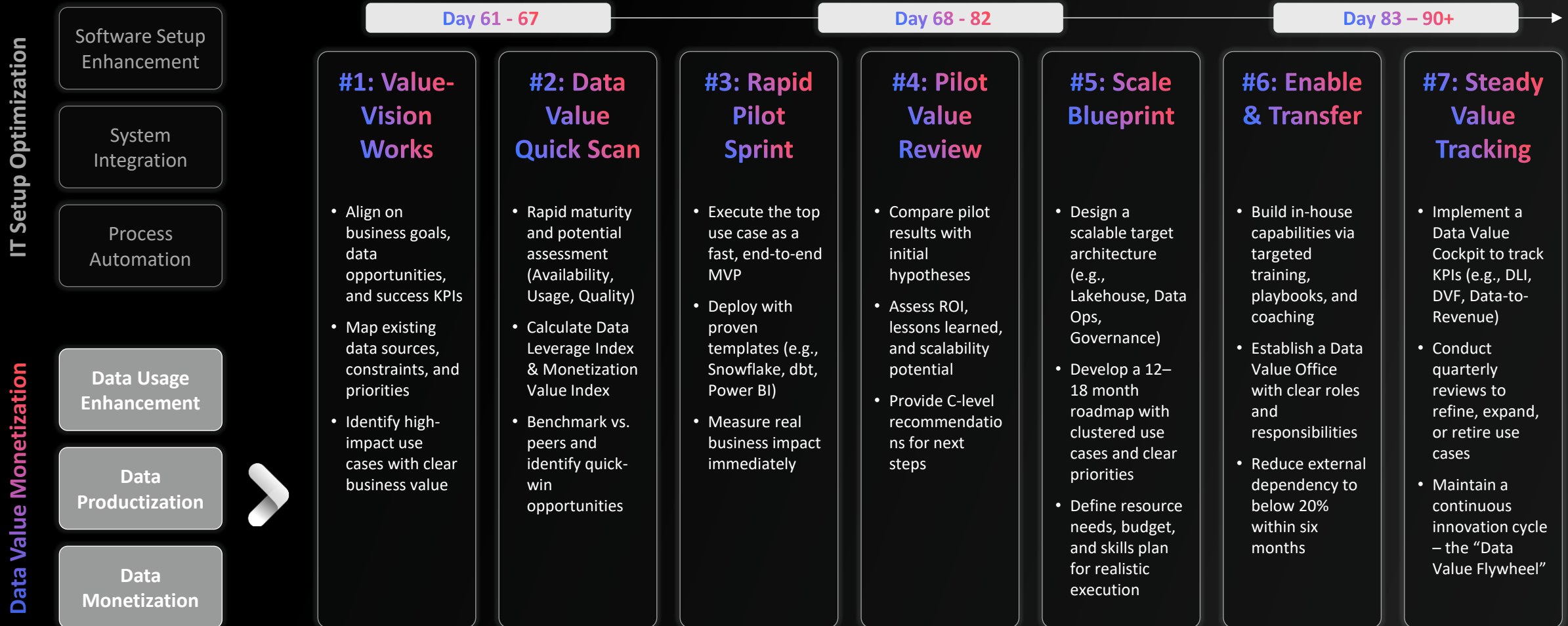
Novemcore has designed a clear, seven-step framework for data value monetization.



Novemcore has designed a clear, seven-step framework for data value monetization.



Novemcore has designed a clear, seven-step framework for data value monetization.



Align the PortCo with your objectives and be **SET FOR INVESTMENT ONBOARDING**.

Aspects	Work	Results
Gain Transparency	Gain full transparency for you and the PortCo management with best practice reporting structures. Roll out a scalable reporting setup aligned with your goals (ValueWorks More).	Reporting Playbook Auto-KPI Reporting
Enable Efficiency	Create value with efficient and automated internal processes, best practice IT setups suiting the company's business model and creating a strong growth foundation. + Optional Tax optimization	Best Practices & Exec. Plan Measures & Effect Strong value for scaleups
Fuel Digital Growth	Drive scaling and growth by smart finance and digital setups allowing for data driven decision taking, automation, and future business models.	Digital Value Exploitation Plan Execution Measures & Effect

Pay only if satisfied

Above expectations

125%

Satisfied

100%

Not useful

0%

Entry Offer Onboarding Plan & Roadmap

Satisfied
[Pricing](#)

Not useful

0 € -100%

Reporting & IT Setup

Maximum value, minimal risk. **You only pay if satisfied.**

Selection of Our Experts



Julian Molitor, CFA
Finance & Digital Expert
(Ex-PwC / Strategy&)



Heinrich Stilling
External Tax Advisor
(Ex-Oliver Wyman, Ex-Verve)

[Learn more](#)



Dr. Wolfgang Faisst
Digital & M&A-Expert
(Ex-Bain, Ex-SAP)



Max Kirschbauer
Due Diligence, M&A
(Ex-valantic)

Our Value Proposition



Strong experience and expertise

40+ value creation projects

10+ year PE experience

8+ industries



Unique analytics capabilities & approaches

Best practice reporting setups

Tax¹ & corporate finance quick wins

Data and digital value monetization



Unique software solutions & data

Partner of leading software solutions

1,000+ sector specific business KPIs

Software usage & integration data

1) Tax advisory services are provided separately by external tax advisor Heinrich Stilling and invoiced under the German Tax Advisor Fee Regulation (StBVV). The shown package price serves simplification and includes separate services, detailed on request, in consultation, and before engagement.

Our investment onboarding checklist provides valuable process guidance.



Onboarding Checklist

Feel free to reach out
to get a copy

Questions & Answers



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