M&A Scale & Financial Governance

<7% Budget Variance

$1.6M Annual Cost Savings

85+ M&A Integrations

28% Hardware Cost Reduction

The Challenge: Growth at the Cost of Stability

PT Solutions entered a phase of aggressive national expansion, managing over 500 clinical locations. However, the rapid pace of acquisitions created significant material operational friction across the portfolio.

All operational changes had to preserve clinical uptime and clinician productivity while integrating new clinics on aggressive timelines without adding internal headcount.

- **Budgetary Volatility:** IT budget variance was trending at 280%, complicating private equity investor relations and stakeholder confidence.
- **Procurement Lag:** Critical clinical device fulfillment took approximately 14 days, stalling new site launches.
- **Integration Debt:** No standardized process existed to onboard the 85+ clinics acquired across the Northeast, Mid-South, and Florida.

The Strategy: Professionalizing Service Delivery

The transformation focused on shifting from a reactive support mindset to a proactive operations model through three key workstreams. This was a private equity operating-model reset: establish predictable spend, accelerate clinic readiness, and build repeatable integration governance that could scale acquisition after acquisition.

I orchestrated a cross-functional operations engine spanning service desk, field support, procurement, and infrastructure. I instituted disciplined financial and operational governance, leading monthly reviews with the C-Suite and SVP-level leadership to ensure 100% alignment between technical service delivery and the organization's P&L.

1. Vendor & Fiscal Sovereignty

Restructured the vendor ecosystem by eliminating redundant Value-Added Resellers (VARs) and moving to direct-manufacturer agreements with Dell. This eliminated markups and secured Net 60 payment terms, improving cash flow predictability.

2. Automation as a Force Multiplier

Deployed **Microsoft Intune** and **Tanium** for modern endpoint management. By implementing Zero-Touch provisioning, device setup time was slashed from hours to just 20 minutes.

3. The M&A Playbook

Developed a comprehensive, repeatable M&A integration playbook covering pre-acquisition due diligence, Day 1 readiness, and post-go-live hypercare and stabilization. This allowed for multi-region integrations without expanding internal headcount.

4. Executive Governance Cadence

Established monthly governance cadences with the C-Suite, SVPs, and Finance to ensure IT spend remained aligned with clinical priorities. Served as the IT lead for monthly reviews, providing executive leadership with a balanced scorecard that integrated financial performance with critical service metrics, including SLA attainment, First-Time Resolution (FTR) rates, and ticket volume trends.

The Results: Measurable Impact

Through disciplined forecasting and transparency, the organization achieved a 97% improvement in fiscal accuracy.

- **Bottom-Line Savings:** Exited unfavorable MSP agreements to generate $1.6M in annual savings.
- **Speed to Clinical Readiness:** Reduced hardware fulfillment time from 14 days to 3 days.
- **Cloud Efficiency:** Optimized hybrid Azure environments to deliver an additional $19K per month in savings.
- **Service Excellence:** Improved internal response times by approximately 40% through insourcing and workflow redesign.
- **Operational Visibility:** Matured reporting by implementing executive and operational dashboards integrating **Freshservice** and **PRTG** data, providing real-time transparency into system health, SLA attainment, and resolution trends.

- **Institutional Knowledge:** Established a high-performance culture through SOP libraries and train-the-trainer models adopted system-wide to ensure technical readiness across a distributed field team.