The Clarity Partnership

PROFESSIONAL SERVICES OVERVIEW

Services Overview

Five engagement modes for businesses at inflection points.

PE-BACKED · PRIVATELY-OWNED · INFLECTION POINTS

Interim CTO / CIO leadership, technology audits, DD readiness, PMI, and AI adoption.

Prepared by The Clarity Partnership

Interim CTO/CIO Services for Businesses at Inflection Points

theclaritypartnership.co.uk

ABOUT THE CLARITY PARTNERSHIP

The Clarity Partnership provides interim and fractional Technology Director / CTO / CIO leadership for PE-backed and privately-owned businesses at inflection points — exit preparation, transformation, integration, or scale.

Nearly thirty years leading complex change and enterprise programmes across Unilever, Samsung, General Mills, Gravity Media, and PE-backed portfolio companies. Every stakeholder conversation, every finding, and every recommendation is delivered by the same senior operator from start to finish.

WHAT SETS CLARITY APART

Business-first framing

Every finding is anchored to a commercial or operational reality — not to a benchmark or a maturity model that means nothing to the CEO.

Human-dimension awareness

Culture, sponsor discipline, cross-level translation, and change ownership are treated as first-order findings, not appendices. Programmes rarely fail because of technology.

Personally delivered

Every engagement led by the same senior operator from discovery to executive presentation. No associate model. No hand-off between partners and delivery teams.

Independent

No vendor allegiance. No downstream implementation upsell. No resale of licences or implementation partner referral fees. Findings and recommendations serve the business, exclusively.

Actionable

Every finding has a recommended action, a proposed owner, a delivery horizon, and — critically — a Do Not Do list that protects the business from wasted investment.

01. Technology Audit

4 WEEKS · £16,500 FIXED FEE · EXTENDED: £22,500 (6 WEEKS)

An independent, structured assessment of the technology estate — systems, integrations, suppliers, governance, security, capability, and culture. Delivered as a defensible view of technology risk, capability, and opportunity, with prioritised recommendations leadership teams can act on immediately.

What is delivered

- Executive summary and prioritised risk register
- Six-pillar assessment: architecture, integration, governance, security, adoption, AI readiness
- System-by-system review of business-critical platforms
- Phased implementation roadmap — Immediate priorities, First 90 Days, Six Month Outlook
- Quick Wins list and Do Not Do list
- Executive presentation of findings and recommendations

When to commission

- Preparing for a PE exit or sale within 18–36 months
- Post-acquisition or post-carve-out, needing a rapid systems and process baseline
- At the start of a Value Creation Plan period, to establish where technology can accelerate delivery
- Following the departure of a key technology figure who held institutional knowledge
- Ahead of significant investment in new platforms, integration work, or AI adoption

02. DD Readiness Assessment

TYPICALLY 5 DAYS CLIENT ENGAGEMENT · £9,500 FIXED FEE · EXTENDED: £15,000

A focused review scored against the specific questions buyers ask in technology due diligence. Outputs a prioritised remediation plan for PE-backed businesses within 12–18 months of a transaction. Sharper and faster than a full audit, focused on exit-blocking risk.

What the fee covers

- 5 days of stakeholder engagement with executive team, IT lead, and relevant function heads
- Preparation and desk review of policies, contracts, systems, and integration documentation
- Six-pillar scored analysis against buyer DD criteria
- Executive-ready written report and risk register
- Executive presentation of findings and remediation plan
- Extended engagement (£15,000) applies to larger or more complex estates — 200+ people, multi-country, or complex integration layers

What is delivered

- Scored risk register against buyer DD criteria
- Single-person dependency map
- Integration fragility summary
- Supplier and contract exposure summary
- Policy stack gap analysis (InfoSec, Incident Management, Third Party Risk, AI Usage)
- AI position assessment
- Prioritised action list with named owners and delivery horizons

When to commission

- 12–18 months before an expected transaction — the pragmatic window
- When technology risks are known but unquantified
- Ahead of a Value Creation Plan refresh
- When PE Operating Partners require a portfolio-level technology diagnostic

03. Interim Technology Leadership

12 WEEKS TO 12 MONTHS+ · DAY RATE OR FIXED MONTHLY RETAINER

Hands-on interim Technology Director / CTO / CIO leadership for portcos preparing for exit, integrating a carve-out, or navigating transformation without permanent CTO/CIO capacity. Delivered with the commercial mindset of a senior operator, not a consultant.

What is delivered

- Direct operational leadership of the technology function
- Closure of DD-blocking risks including single-person dependencies and policy gaps
- Refresh of policy stack and governance framework
- Supplier renegotiation, rationalisation, and cost recovery
- Team stabilisation, capability transfer, and knowledge extraction
- Value Creation Plan technology roadmap and delivery oversight
- Handover documentation for a permanent successor (where applicable)

When to commission

- Between permanent CTO/CIO hires, particularly ahead of exit
- When a departing IT owner has built systems alone and knowledge extraction is critical
- During intensive transformation, ERP migration, or system integration work
- When exit horizon requires senior operator focus a permanent hire cannot provide

04. Post-Merger Integration

ENGAGEMENT-SPECIFIC · FIXED FEE OR DAY RATE

Technology integration leadership for PE-backed carve-outs and post-merger environments. Focus on the operational realities of integration — governance, dependencies, and TSA delivery — rather than the integration slide deck.

What is delivered

- Cross-functional integration governance across acquired and acquiring entities
- Integration roadmap, sequencing, and dependency mapping
- Transitional Service Agreement (TSA) design, delivery, and exit
- Data and systems migration oversight
- Value Creation Plan alignment with integration delivery
- Post-integration operating model design

Recent example

£500m PMI at Gravity Media — cross-functional integration governance across SAP, Dynamics, Salesforce, and EDI. Transformation playbook, VCP, and Transitional Service Agreement delivered for handover.

When to commission

- Immediately post-transaction, when integration governance is not yet established
- When carve-out timelines are tight and TSA exit dates are firm
- When multiple technology stacks must be integrated at pace
- When integration risk threatens deal value or exit optionality

05. AI Adoption Assessment

TYPICALLY 1–2 WEEKS · FROM £6,500 FIXED FEE

Proprietary AI diagnostic covering 26 use cases across six categories — Revenue, Internal Operations, Risk & Compliance, Customer, Technology, and People. Weighted scoring, phased roadmapping, budget-fit analysis. Focus on realising AI value while foundations are being rebuilt.

What is delivered

- AI Adoption Impact Assessment across 26 use cases
- Readiness, Opportunity, and Risk scoring (0–100 each)
- Per-use-case impact: efficiency gain %, revenue impact £, time to value
- Budget fit analysis with phased roadmap (Phase 1 within budget, Phase 2 investment required)
- Executive summary with prioritised recommendations by horizon
- AI Usage Policy review or drafting for governance gap closure

When to commission

- When leadership lacks a credible AI position for buyer DD
- Ahead of significant AI investment decisions
- When AI adoption is fragmented across departments with no coordination
- When AI is in use without a governance framework or policy
- Ahead of a Value Creation Plan technology component

ALSO AVAILABLE · Composite Engagements

Where a business need spans multiple engagement modes — combining a Technology Audit with interim leadership to close identified risks, or delivering a DD Readiness Assessment alongside supplier renegotiation — engagements can be structured as a composite programme.

Also available: advisory-only Board Technology Advisor retainer for ongoing strategic input, and multi-portco engagements across a PE fund's portfolio.

Pricing is agreed as a single fixed fee, defined-scope proposal, or monthly retainer, drawing on the pricing anchors above.

ALSO AVAILABLE · Programme Rescue

For businesses running stalled, over-budget, or under-delivering technology programmes. Delivered as an interim engagement with a rescue mandate — rapid diagnosis of what is genuinely broken (often not what leadership assumes), stabilisation of the delivery team, and re-planning against realistic outcomes.

Duration and day rate reflect the diagnostic complexity and the difficulty of taking over a programme already under pressure.

Recent example

Brought in to deliver a stalled multi-million pound global pilot programme, framed as a technology failure at UAT. Diagnosis surfaced the real issue was relationship failure between the business team and the vendor. Two weeks of on-site team building and a partial re-run of requirements closed the gap. The pilot went live, and the pattern became the template rolled out across all subsequent markets globally.

The commercial outcome mattered. The pattern of leadership mattered more.

NEXT STEPS

- A 30-minute introductory call to discuss business context, timeline, and specific concerns.
- Agreed scope, timeline, and start date for the appropriate engagement mode.
- Delivery within the agreed timeframe, culminating in executive presentation.
- Discussion of follow-on engagement options based on findings.

ADDITIONAL RESOURCES

All resources available at theclaritypartnership.co.uk:

- Technology Audit Framework — full methodology, scope, and deliverables
- DD Readiness Scorecard — 30-question self-assessment across six pillars
- Insights — thinking on technology DD, AI in PE, and interim leadership

IR35 AND CONTRACTING

- Engagements structured outside IR35 through The Clarity Partnership
- Contracts include substitution clause, defined deliverables, and business-owned working practices
- Consistent with HMRC CEST criteria and standard PE fractional engagement norms

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The Clarity Partnership

Execution partner, not advisor.

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