

FORMAT // FRACTIONAL

PRIVATE EQUITY · M&A ADVISORY · OVERLAY

A strategic PE / M&A advisory firm

Senior-advisor overlay across the firm's strategic-account portfolio.

Ongoing fractional overlay inside a PE/M&A-focused advisory firm — senior CRM, customer, and digital-transformation expertise across the strategic-account portfolio, partner-led pitches, and post-close diligence.

DURATION	FEE	FORMAT	TIED TO
6+ months	T&E	Fractional	Portfolio
Ongoing · defined cadence	Tied to outcomes or ad-hoc	Senior overlay across portfolio	Strategic accounts & pitches

// APPROACH

Three-step methodology, anchored to a single decision.

- 01** **Overlay the Strategic-Account Portfolio**
Sit alongside Partners and Principals on the firm's largest accounts — bringing senior CRM, customer-success, and digital-operations expertise into client-facing rooms.
- 02** **Connect Diligence to Operating Reality**
Translate sponsor thesis and partner positioning into operational reality — what's actually achievable in the first 90, 180, 365 days post-close.
- 03** **Build the Firm's Customer Practice**
Develop the firm's repeatable Salesforce and customer-strategy playbook so the practice scales beyond any single engagement.

// DELIVERABLES

What lands in the inbox at the end of the Fractional.

CADENCE	Strategic-Account Overlay Cadence Embedded senior expertise across the firm's portfolio reviews.	PORTFOLIO
BRIDGE	Diligence-to-Operating Bridge Translate sponsor thesis into 90/180/365-day operational reality.	PER DEAL
PRACTICE	CRM & Customer Practice Build Repeatable Salesforce and customer-strategy playbook for the firm.	PLAYBOOK
SENIOR	Senior Reference Calls Credibility on partner-led pitches and post-close operating conversations.	AS NEEDED

// COVERAGE

6+

MONTHS ONGOING

1

SENIOR OVERLAY VOICE

Portfolio

OF STRATEGIC ACCOUNTS

NDA

CONFIDENTIAL BY DESIGN

// OUTCOME

A stronger, more repeatable customer/CRM practice – sharper post-close operating points of view, and a senior voice present on the firm's largest accounts without taking a full-time partner slot.

FORMAT · FRACTIONAL · 6+ MONTHS

If this Fractional feels close to what you need —

Initial conversations are confidential, complimentary, and take thirty minutes.

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