

# Independent Consultants: Accelerating Value for Private Equity

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## Introduction

Talent needs for investor-backed companies vary throughout their growth. Independent talent consultants who have both consulting and operational experience are an excellent fit for these specialized needs.

Access to skilled, cost-effective independent consultants offers a competitive edge, given extended exit timelines, slower multiple expansions, and the pressure for portfolio companies to achieve profitable growth. [TrueBridge](#), part of [True Search](#) (the sixth-largest global executive search firm), offers independent consultants for projects in strategy, operations, transformation, organization, and M&A, as well as functional leaders for roles in finance, marketing, sales, HR, and technology at the C-Suite and one level down.

In this article, I explore why independent consultants are essential for PE talent strategy, backed by my own insights from 15+ years of experience, True's extensive knowledge in private equity, and discussions with four fellow TrueBridge Talent Network project consultants.

## How and when a talent consultant can help

**Before an acquisition,** an independent consultant can offer market and industry assessments, pipeline building, and strategic insights. "I bring a fresh perspective from having worked with many clients, rather than being immersed in only one field," says Cathy Tsai, a former Bain consultant and TrueBridge Talent Network member who focuses on growth and marketing strategy. "I can deliver results that match the PE firm's fast pace quickly."

**During due diligence,** independent consultants, possibly with subject matter experts, can quickly assess private equity investments, delving deeper into targets, analyzing financials and conducting customer and expert interviews.

Rapid plan execution is key for 3-6 months post-investment. An independent consultant can help leadership teams develop and execute a 100-day value creation plan with innovative decision-making. "I can share ideas and best practices from other industries," says Joe Shermetaro, a former Bain consultant now helping small to mid-market portfolio companies with strategy and operations. "Another advantage is flexibility. I can step in for a few months to get results, without the cost and overhead of a multi-year hire, and I'm more cost-effective than hiring a full case team from a traditional consulting firm."

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## How and when a talent consultant can help

Independent consultants can also help implement specific parts of the **long-term plan**. This might involve leading a digital transformation, redesigning an organizational model, optimizing supply chains, restructuring, and more. Tsai says she has helped clients revisit growth strategies when the market changes later in their investment lifecycle, and with exit timelines and new narratives for investors.

Independent consultants serve as **objective strategic and operational leaders**, often acting as Chief of Staff to CEOs or CFOs in new acquisitions. They ensure cross-functional development and execution of operating plans, unburdened by long-term personal brand building or securing permanent positions. Caroline Wooldridge, a former BCG consultant and current TrueBridge Talent Network expert, views them as a strategic tool for portfolio companies to rapidly assess leadership needs and define the ideal profile for a future full-time hire. “I enable the C-Suite, providing extra horsepower that allows a CEO or CFO to focus on the most visible parts of the business, while I focus on other areas and coach managers as they level up,” she says. Wooldridge often partners with executive teams on annual and multi-year planning, organizational design, operating models, and other strategic endeavors.

Successful investment in a roll-up strategy requires **integrating acquisitions**. Post-merger integration experts, like Dana Green from the TrueBridge Network, can ensure success. Green, an experienced M&A and post-merger integration consultant and former Microsoft Corporate Development executive, offers clients value by applying best practices and lessons learned from diverse client experiences.

## What independent consultants bring

### **Diverse experiences**

Many project consultants pair their training at top-tier consulting firms with deep operational experience at leading companies. This blend of strategy and execution brings valuable frameworks, tools, and a practical understanding of how to get things done. Their work across various industries offers fresh perspectives, enabling quick integration and immediate impact.

### **Senior, hands-on expertise**

Independent consultants are seasoned leaders who chose this path because they are passionate about solving problems and doing the work themselves, and the expert you hire is the one who delivers the results. TrueBridge connects you directly with these senior leaders, who specialize in areas like growth strategy, operational transformation, and restructuring.

### **Agility and adaptability**

Independent consultants can adapt quickly to client needs and changing project requirements. This lean approach leads to more efficient and effective outcomes. TrueBridge's network accelerates this process, providing vetted candidates in 3-5 days.

### **Change leadership and trusted partnership**

Senior consultants excel at guiding complex organizational change. They are skilled at partnering with executive teams to secure buy-in and build trust, ensuring everyone is aligned. They quickly earn credibility by collaborating effectively, not just by providing the client with a deliverable.

### **Cost-effectiveness**

With an independent consultant, you only pay for the expertise you need. This model ensures you get a higher return on your investment, deploying a senior leader for a fraction of the cost of a permanent hire.

## Considerations for engagement

When clients consider project consultants, I encourage them to ask the following questions:

### **Why is an independent consultant the right talent choice for me?**

Most independent consultants, including from the TrueBridge network, have big-firm training and operational experience at leading companies. They have chosen independent consulting as a career path to work with a variety of clients in different industries, developing their ability to provide fast, efficient, and innovative solutions. For initiatives with specific deliverables, such as an organization assessment and redesign or new market entry strategy, a consultant with specialized expertise would be ideal.

### **Can 1-2 consultants tackle this initiative or do we need a team?**

For engagements requiring one or two resources rather than a large consulting team, project consultants offer a cost-effective solution. You gain the expertise of a senior professional without the overhead of a large consulting firm.

### **What is the ideal talent profile for quickly achieving my business goals?**

TrueBridge consults with clients to precisely define the talent and skills needed for each initiative. We use True's proprietary technology platform, [Thrive](#), to quickly match and present the best-fit independent consultants to projects.

### **What is the timeline for completing this initiative, and what are the implications of delaying it?**

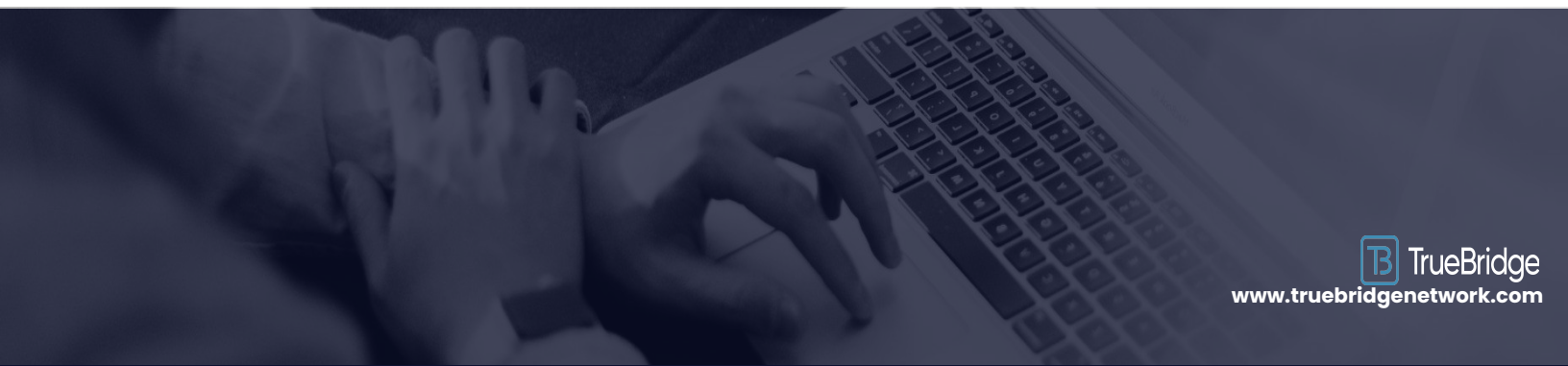
If urgency is critical and a portfolio operations team does not have the bandwidth, you can interview project consultants in 5 business days and have them deployed within two weeks for quick leverage.

### **What are the potential risks of considering project consulting?**

With no upfront commitment, you can consult with a few project consultants to understand the benefits they bring, such as speed and niche expertise, before weighing the options of engaging a consulting firm or a permanent team member.

### **Will the required skillset remain constant in the next 6-12 months?**

The answer is often no, highlighting the need for external resources to solve current problems.



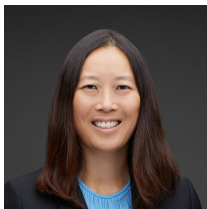
## Conclusion

Independent project consultants offer private equity firms a powerful strategic advantage by addressing their two most critical needs: accelerating value creation and deploying precisely the right expertise for a specific initiative.

Instead of trying to make the available skills of an internal team fit the challenge, PE firms can engage an expert whose background is perfectly tailored to your project's unique demands. This targeted approach avoids the high overhead of a large consulting firm and the delays caused by limited internal bandwidth, ensuring investment goals stay on track.

As a leader in working with private equity firms, TrueBridge can help you accelerate your value creation plans with independent project consultants. To explore how TrueBridge can help you with a specific initiative, please contact [Letitia Chan Peypoch](#) to learn more.

## About the Author



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Letitia Chan Peypoch is a Partner at [TrueBridge](#), [True Search](#)'s interim, fractional, and project consulting practice. She is a human capital expert who has extensive experience helping clients solve critical business issues and talent gaps with senior independent talent. Letitia focuses on C-Suite interim placements across all functional areas and independent consulting talent placements in strategy, operations, transformation, organization, and M&A projects. She brings expertise in structuring engagements for private equity clients and their portfolio companies and public companies.

Letitia brings a consultative approach to structuring assignments with clients and consultants drawing from past roles in strategic planning, consulting, and investment banking at The Gap, Inc., Bain, and Merrill Lynch as well as independent consulting roles at Levi Strauss and Stanford Graduate School of Business.

Letitia was the former COO of an early disruptor and leader in the independent consulting space which was acquired by a leading public executive search firm. She oversaw the talent acquisition, delivery, and technology teams and scaled and innovated the service model for interim and project consulting at that firm.



## Bios



Cathy Tsai

[Cathy Tsai](#) is a seasoned growth and marketing strategy consultant with over 20 years of experience across consumer, media, and tech sectors for public and investor backed companies. After roles at Bain, Google, and Warner Brothers, Cathy has been an independent consultant for the last 13 years.

Cathy's expertise with investor backed companies includes evaluating acquisition, partnership, and investment opportunities, product and sales strategy, geographic expansion, and consumer and market insights and forecasting. She has experience in researching and building acquisition target pipelines for a global private equity fund, focusing on industries such as real estate and healthcare services. She also drove growth strategy for middle-market private equity-backed portfolio companies in sectors including government services and post-secondary education.



Caroline Wooldridge

[Caroline Wooldridge](#) is a seasoned independent consultant and advisor, focusing on corporate strategy, transformation, business operations, and people operations. She specializes in assisting PE-backed organizations navigating change, growth, or M&A, leveraging her background as a Project Leader at BCG and an executive overseeing strategy and operations at WeWork and The Players' Tribune.

As Head of Strategy and Operations for private equity portfolio companies (\$50M–\$1B+), Caroline led long-term strategic and revenue planning, annual OKRs, and board reporting. She redesigned operating models, organizational structures, and revenue streams, while enhancing customer experience through CX KPIs and journey mapping. For PE investors, she developed leadership assessments and recommendations for Series A–C targets based on executive interviews. She also provides coaching and mentoring to executives and managers, particularly during ownership transitions or growth investments.



Joe Shermetaro

[Joe Shermetaro](#) is an independent consultant with 14 years of experience, previously at Bain and Palantir. He offers strategic and operational consulting to small and mid-market management teams, specializing in technology, financial services, consumer goods, and private equity. His recent work includes developing an omni-channel marketing strategy to boost in-store sales, analyzing collaboration software markets, providing competitive intelligence on data governance and privacy, and conducting due diligence on cloud-based CRM companies.



Dana Green

[Dana Green](#) is an M&A executive and consultant with over 30 years of experience. He specializes in helping clients build investor-grade enterprise value, leading to a recapitalization or liquidity event.

Earlier in his career, Dana held corporate development leadership roles at Microsoft, where he led 44 acquisitions globally and managed divestiture efforts. For the past two decades, he has run a private consulting practice focused on M&A and post-merger integration (PMI) strategy and execution.

He has successfully led numerous complex integration projects for five client companies with over \$1 billion in revenue across the security, technology, and property management industries. To date, Dana has completed 62 buy-side and sell-side transactions, providing expertise in deal sourcing, due diligence, definitive agreement structuring, and PMI design and execution.