

## Evaluating Scalability

# Opex Delivers Strategic Platform Assessment for PE-Backed Energy Firm



## Challenge

A rapidly growing, private equity-owned service provider in the petroleum and clean energy sector faced a critical inflection point. As the company scaled through acquisition, its in-house service management platform—central to field operations—was under scrutiny. Leadership needed to know: could the platform scale with the business, and could it serve as a unifying layer across newly acquired entities?



## Engagement

Senior leaders from Opex's Strategic Leadership as a Service (SLaaS) team brought an outside perspective grounded in executive-level experience. Our approach focused on client success through structured assessments, knowledge transfer, and strategic advisory services—delivered with no technology bias or vendor preference.

We deployed a cross-functional team with deep expertise in security, IT, operations, and program management to lead an unbiased evaluation. The scope included technical scalability, user experience, operational workflows, and organizational readiness.



## Results

Through focused workshops, stakeholder interviews, and technical reviews, Opex SLaaS delivered a clear, actionable assessment. SLaaS recommendations covered:

- A short- and long-term platform strategy
- Operational process improvements
- Organizational structure and roles
- Talent gaps and growth opportunities

Seamless collaboration between Opex SLaaS and Opex Technology Advisory teams also resulted in immediate recommendations around cloud migration and security. Equipped with these insights, the client is now aligned internally and with their investors on a strategic path forward—one that enables integration of acquisitions, enhances field technician experience, and supports continued growth.

LET'S TALK

