

CAST VCMS for Private Equity

A Standardized Operating Model for Vendor and Contract Spend Across the Portfolio

Vendor-neutral | Delivery-first | Outcome-aligned pricing: if your PortCos do not save, we do not get paid

Executive Summary

Whether a portfolio company has a dedicated vendor and contract operating model or not, the gap is usually the same: vendor contracts, renewals, and licensing decisions happen without a clear line of sight into the technology architecture underneath. Renewals auto-process without negotiation. Licenses go unused or oversized. Pricing increases pass through unchallenged. Finance sees the invoices but lacks the technical context to push back. IT understands the technology but rarely has visibility into the full contract landscape. Multiply this across a portfolio and the result is millions in unmanaged vendor spend with no consistent governance, no visibility for the operating team, and no reliable way to measure value creation.

The typical options are advice-only consultants who leave PortCo leadership holding the bag, or vendor brokers who get paid by the vendors they recommend. CAST is neither. We are an execution-first firm that embeds with PortCo Finance and IT teams to install the operating model behind vendor, contract, and architecture spend, including leading vendor negotiations with pricing benchmarks and usage-backed leverage. We build a governed operating model at each PortCo that incorporates technology architecture into every decision, aligns business units by mapping vendor capabilities to actual business use cases, and delivers measurable EBITDA impact from a single governed system of record.

Our pricing is aligned to outcomes. CAST offers fully performance-based or hybrid engagement models to fit PortCo procurement and budget requirements. We do not accept vendor commissions, kickbacks, referral fees, or revenue shares. If your PortCos do not save, we do not get paid.

Outcomes You Can Defend

Material Savings	Zero Risk	Early Activation
Realized and forward, Finance-validated and baseline-tracked at each PortCo	100% performance-based or hybrid pricing options	Baseline, calendar, and governance operational early in the engagement at each PortCo

What Changes Fast

Portfolio-wide visibility

- Vendor + contract inventory per PortCo
- Cross-portfolio spend benchmarking
- Identify duplicates and consolidation

Stop auto-renew waste

- Notice windows + renewal calendar
- Decision deadlines & approvals
- Evidence attached to every claim

Report with confidence

- Single governed source of truth
 - Consistent reporting across PortCos
 - Audit trail + lineage by design
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Why CASt

We Execute. We are not advice-only consultants. We embed at the PortCo level, deliver the work, and own the outcome alongside PortCo leadership and your operating team.

Zero Conflicts. No vendor commissions, kickbacks, referral fees, or revenue shares. Our only revenue comes directly from clients.

Audit-Ready. Built for PE scrutiny and CFO confidence. Baselines use actual spend, and every savings claim requires billing proof and PortCo Finance sign-off.

Zero Risk. Zero capex, no retainer, no platform fee. Performance-based fees tied to realized, Finance-validated savings. If we do not deliver savings, there is no fee.

How It Works

VCMS is deployed at the portfolio company level as a structured engagement, scoped to align with a full contract renewal cycle, supported by CASt's internal tooling in a secure, isolated workspace. CASt installs the operating model, delivers measurable results, and transitions the PortCo to self-manage with the option for ongoing governance support. The model is repeatable across your portfolio.

What CASt VCMS Does at Each PortCo

- Delivers a governed vendor + contract master
- Leads vendor negotiations with pricing benchmarks, usage data, and contract leverage
- Surfaces renewal risk, cost leakage, and non-standard terms before they become costs
- Creates an audit-ready record of what changed, who changed it, and why
- Produces CFO-grade reporting with evidence and lineage

Portfolio-Level Value

- Repeatable deployment model across PortCos
- Consistent governance standards and reporting for the operating team
- Cross-portfolio vendor leverage and spend benchmarking
- EBITDA impact tracked per PortCo with audit-ready documentation
- Transition to PortCo self-management with ongoing support option

Architecture, Governance & Security

Technical Architecture	Governance & Controls	Security & Trust
Map vendors to PortCo reference architecture	Renewal control: notice windows, owners, approvals, deadlines	Isolated workspace per PortCo
Identify consolidation, re-platform, and retirement opportunities	Evidence + lineage for every term, date, and price change	Least-privilege access + role-based approvals
Translate technical risk into executive decision options	CFO-grade measurement: baselines, savings ledger, audit reporting	Evidence-backed changes with full audit trail

What Each PortCo Gets Fast (Early in the Engagement)

- Cleaned vendor + contract inventory with ownership and renewal dates
- Renewal calendar reflecting actual contract terms and notice windows
- Exceptions register: missing contracts, non-standard terms, duplicates
- Executive reporting pack: renewals, redundancies, value levers
- Savings baseline + tracked savings ledger

Value Creation Levers Across the Portfolio

- Stop auto-renew waste: notice windows and decisions on rails
 - Renegotiate from strength: price protections and usage-backed leverage
 - Rationalize SaaS portfolios: remove duplicates and eliminate shelfware
 - Consolidate vendors across PortCos for volume leverage
 - Standardize governance for consistent reporting to the operating team
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Next Step: Working Session with Your Operating Team

Walk through the portfolio vendor landscape, identify the highest-impact PortCos to start with, and define the path to measurable EBITDA improvement.

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