

Shared Service Teams: The Backbone of Continuity and Scale

HOW STRATEGY, TECH, AND OPS LEADERS DRIVE
EFFICIENCY ACROSS PORTFOLIO COMPANIES



From Blackstone to Brookfield to Vista Equity, leading firms have quietly built a major competitive advantage: shared service teams. These centralized, execution-focused teams are now essential for scaling innovation, accelerating integration, and preserving continuity across complex portfolios. Blackstone uses shared expertise to rapidly deploy CRM systems and optimize hiring pipelines. Brookfield centralizes ESG, procurement, and data functions to cut costs across infrastructure and real estate. Vista institutionalizes best practices through its Standard Operating Platform, enabling faster, repeatable success across investments.

This shift reflects a broader evolution in private capital and corporate strategy: value creation is no longer just about capital deployment—it's about capability replication. And shared service teams are the infrastructure making it possible.

What Are Shared Service Teams?

Shared service teams are centralized groups within a firm or fund that offer specialized capabilities—like IT architecture, data governance, marketing automation, compliance, or talent strategy—across all business units or portfolio companies.

Unlike siloed internal teams, shared services are designed to be portable and repeatable. They aren't just advisors—they are execution engines that plug into companies, projects, or initiatives to accelerate growth and streamline operations.

Why They Matter for Strategy, Tech & Ops Professionals

One of the biggest challenges in portfolio management is fragmented data. Different CRM systems, reporting structures, and integration methods can prevent a firm from seeing its performance holistically.

Shared data teams standardize architecture across companies—enabling clean, comparable, and centralized data pipelines. This means faster reporting, better insights, and stronger compliance across entities.

"The value of data is only unlocked when it's consistent, timely, and actionable across the enterprise."

— McKinsey Global Institute, 2023

For strategy and operations leaders, post-acquisition integration is where execution risk often materializes. Shared service teams eliminate redundancy by offering pre-built playbooks—HRIS onboarding, financial systems alignment, cybersecurity frameworks—that turn chaotic onboarding into a predictable process.

They Preserve Relationship Capital

Client relationships are often fragile during transitions. Shared service teams maintain CRM and client communications infrastructure that ensures no touchpoint is lost during restructuring, leadership changes, or rebranding.

This is particularly critical in B2B or institutional relationships, where continuity of communication is a proxy for credibility. For ops leaders, shared CRM and engagement tools reduce the risk of dropped relationships.

"In institutional sales, memory is a competitive advantage. Shared services ensure no account ever goes dark."

— Harvard Business Review, "Operational Excellence in Complex Organizations," 2022

Turn Insights into Infrastructure

Strategy teams often uncover process gaps or growth opportunities—what's hard is implementing them at scale. Shared service centers allow great ideas (an automated onboarding process, a winning lead-nurture email sequence, a better BI dashboard) to become deployable assets.

In this way, shared services don't just fix problems—they become multipliers of innovation.

Think Like a Platform

As investment firms become more operationally involved in their holdings, the importance of internal infrastructure grows. Shared service teams are no longer a back-office function—they are a strategic lever.

For technology, operations, and strategy leaders, this is the path to greater efficiency, smarter execution, and real firmwide impact. In a world chasing alpha, shared service teams are the engine behind repeatable success.