



# USING CULTURE AS A VALUE CREATION LEVER ACROSS THE PORTFOLIO



## CASE STUDY

### Client Overview

Argosy Private Equity is a lower-middle-market private equity firm with a long history of platform investing. Known for disciplined operational improvement and a hands-on approach to value creation, Argosy views culture as a strategic asset that drives execution, accelerates integration, and strengthens leadership alignment throughout its portfolio companies.

### Why It Matters

Argosy believes culture is not “soft stuff,” but a repeatable operating system that makes strategy and operational playbooks actually stick. Clarity and consistency with culture and leadership are the multiplier for operational acumen.



“Financial engineering is table stakes... the next frontier is culture.”

-Lane Wiggers, Managing Director



“We start with culture. One of the first slides in our management presentations is our core values.”

-Don Charlton, Partner

### Challenges

Across founder-led and scaling businesses, Argosy saw recurring issues that slowed execution and created risk:

- Add-on integrations suffered from inconsistent expectations and cultural disconnects.
- Turnover and engagement issues created drag on EBITDA and slowed growth.
- Distributed organizations struggled with “us vs. them” dynamics between corporate and field teams.
- Values were often implicit, not documented or teachable.
- Leadership behaviors varied widely across teams and locations.

These gaps made it harder to scale, harder to integrate, and harder to hold leaders accountable.



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# Solutions

Argosy partnered with CultureWise to create a behavioral operating system across select portfolio companies, turning vague culture into explicit, repeatable habits that leaders could own and reinforce.

**What CultureWise and portfolio leaders built together:**

**Fundamentals:** Clear, behavior based standards defining “how we do things here.”

**Rituals:** Weekly and meeting-based practices that keep behaviors alive.

**Leadership Alignment:** Coaching, 360s, and expectations tied directly to values.

**Scalability:** A common language that works across locations and add-ons.

## Portfolio Example



A distributed organization with dozens of locations struggled with an “us vs. them” divide between

branches and corporate. CultureWise helped define 28 Fundamentals, launch weekly rituals, and embed leadership behaviors. Argosy described “walls breaking down,” stronger alignment, and more consistent execution across the system.



## Results

Argosy reports measurable improvements in areas that directly impact value creation:

- ✓ Reduced turnover, lowering a \$1.2M annual cost that translated to ~\$10M in enterprise value at exit multiples.
- ✓ Faster time to value post close, with clearer expectations and early leadership alignment.
- ✓ Smoother add-on integrations, driven by a shared language and consistent rituals.
- ✓ Higher engagement and accountability, especially in distributed teams.

CultureWise helped Argosy turn culture into a scalable system that accelerates execution and strengthens leadership across the portfolio.

## How PE Firms Use culturewise



Pre close  
culture  
diligence



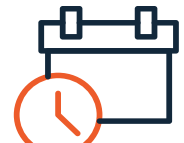
90-day rollout  
playbook



Leadership  
alignment &  
coaching



Add-on  
integration kit



Quarterly  
reinforcement &  
measurement



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