

CASE STUDY

Mergers and Acquisitions

Problem: A client dependent on a successful merger and acquisition strategy could not accomplish effective integration.

Approach: We assessed their current policies, procedures and practices toward newly acquired companies. We also used our first-hand experience with mergers and acquisitions and our research into current best practices to custom design a training program that upgraded internal capabilities and eliminated gaps in their approach. The entire spectrum of involved functions was brought together to develop a single, comprehensive systems approach to the work, with roles and interdependencies identified, responsibilities clarified and accountabilities defined.

Results: Key personnel in all necessary departments have successfully completed the training, greatly upgrading internal employee capabilities.
In addition:

- Interdependencies between functional areas have been highlighted, setting the stage for additional process improvements to occur to further improve effectiveness.
- A plan for process improvements has been established, with particular focus on those processes that are cross-functional in nature.
- A common guide has been developed to serve as a current reference document and also as a training tool for new team members.

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