

MOVING YOUR BUSINESS FORWARD WITH TECHNOLOGY

Case Study

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5P CONSULTING

CASE STUDY M&A: Divestiture & Carve-Out Story

BACKGROUND (the Story)

As part of an acquisition and \$300 million divestiture, Company A funded the purchase of 'assets and service offerings' with the purpose of developing a brand-new Company B. Mergers and acquisitions is a complex and complicated process, and 5P Consulting was selected as the service integration partner to lead the delivery and exit of the Transition Service Agreement (TSA) for the new organization. Our scope was comprehensive: to develop business processes and implement all of the business applications while leading the program management of other service providers to ensure they met Company B's strategic goals.

WHAT WE DID

We designed an integrated, cutting-edge SaaS-based architecture across finance, human resources, sales, marketing, and customer service. We developed and implemented brand-new customized business processes, in addition to selecting vendors, and managing the design and integration of Salesforce, ServiceNow, NetSuite, ADP, and asset rollouts.

Activities included:

- ◆ Provided Merger and Acquisition (M&A) best practices in the design of business and solution architecture.
- ◆ Developed sales and post-sales client delivery processes and implementation of Salesforce
- ◆ Developed customer service helpdesk implementation with ServiceNow
- ◆ Developed internal IT helpdesk implementation with ServiceNow

- ◆ Implemented system integration across NetSuite, ServiceNow, Salesforce, and a custom Self Service Portal
- ◆ Collected legacy assets and reissued new assets globally
- ◆ Implemented Sarbanes Oxley (SOX) Reporting
- ◆ Developed end-to-end data architecture across the order-to-cash process
- ◆ Implemented metadata governance and a change advisory board
- ◆ Developed Service Level Agreements (SLAs), Reports, and Dashboards

HOW WE DID IT

At 5P Consulting we don't have a one-size-fits-all solution. We worked with Company B to establish a close relationship with all parties involved to determine their unique needs and the processes and products that would work best for them.

"What's working right now? What is your goal this year, in 2 years?" These are some of the questions we asked when working with Company B. With this information, we determined process gaps and developed specific recommendations that worked.

Pain Points

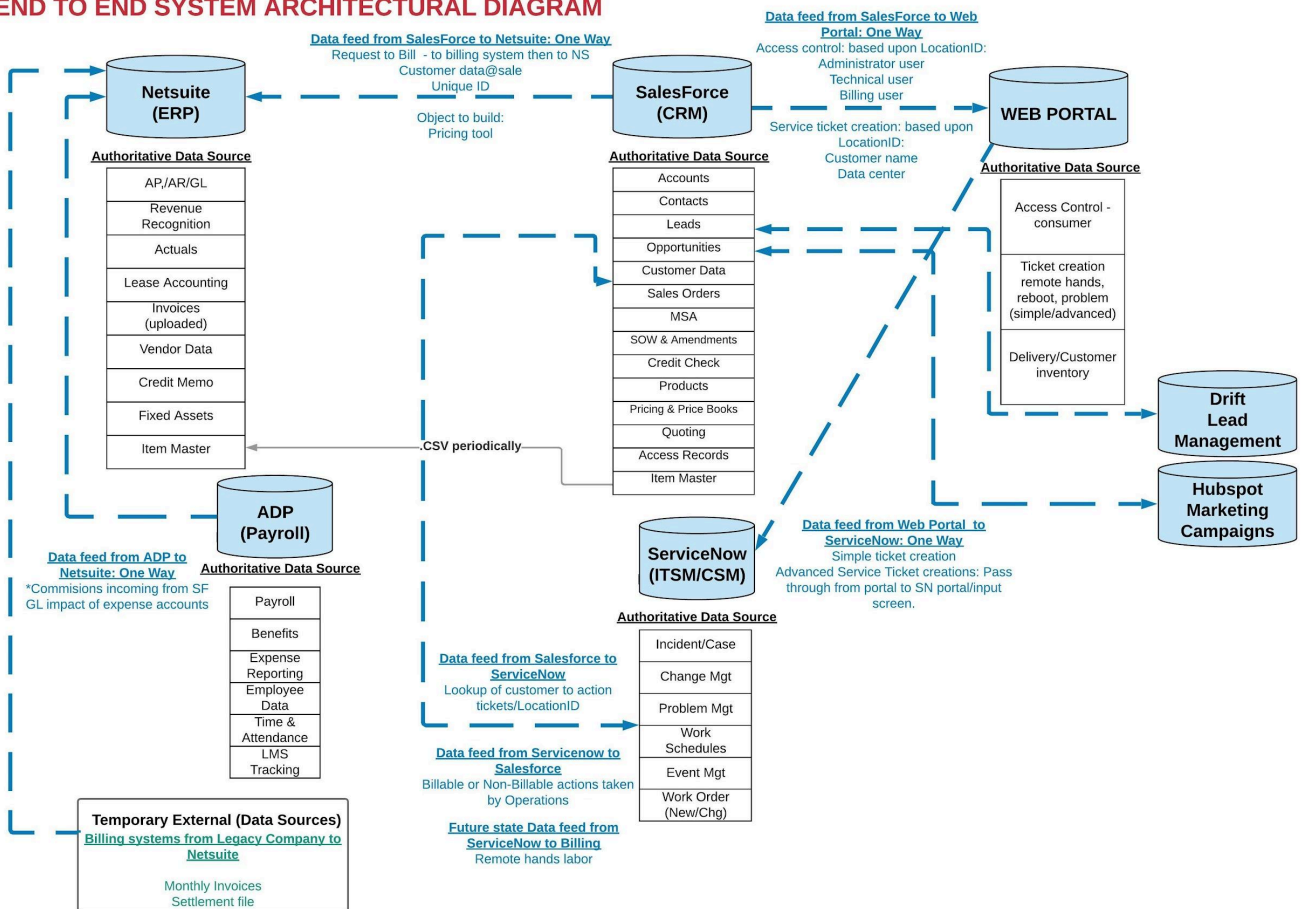
- ◆ Different points of view had to be integrated together to drive aligned architectural solutions
- ◆ There were no systems or processes in place at the beginning of this project - Company B was built from the ground up
- ◆ The environment was fluid as Company B was in development
- ◆ There was a very short timeframe to get preliminary processes in place

According to Company B: "We were off to the races . . . we had 4 months to get systems in place for Day 1 so we immediately reached out to 5P Consulting for help." We listened to Company B's goals, budget, and timeframe. We provided knowledge on how the process of systems integration works, and what their options were for building the company. From there we could recommend the products and vendors that would work best for them.

End-to-End Architecture

What did Company B need now? In 1 year? Beyond? To determine the best products and processes for Company B now and into the future, we developed an end-to-end architecture map. We asked questions such as; where does your data live and how does it talk to each other? Where are the current gaps and deficiencies that are preventing the business from accomplishing its goals? What opportunities are there to set up a minimally viable state today and invest long-term into integration based on the company's evolution?

END TO END SYSTEM ARCHITECTURAL DIAGRAM



An end-to-end architecture map identified data for manual processes and automation. It highlights gaps, what state the company is in now, and what its future needs will be. We then set goals based on the priorities and budget of the company and based on these goals we began to improve and automate systems and processes. The end-to-end architecture map was a tool used immediately, and over time as the company grew, it served as a roadmap for future growth.

Using the end-to-end architecture map developed for Company B, enabled us to help them identify their current needs and implement systems that addressed those needs.

For example:

- ◆ Salesforce, a robust pre- and post-sales solution, was chosen for the sales needs of Company B. Salesforce was used to nurture leads, provide quotes, contract generation, management, and up-sales.
- ◆ ServiceNow was selected to manage internal IT tickets to support Company B's IT needs. ServiceNow was also selected for the external customer-facing portal to manage their services. It provided service management, customer service support, and customer self-service, allowing customers to manage 'on and off' services.

Company B was built from scratch—before they reached out to us they had no infrastructure in place. In 4 months we helped them develop an end-to-end architecture map and build the systems and processes they needed to launch, working side-by-side with their team to develop and implement the best products for them. Today, we are continuing to work with Company B to optimize what is working and revisit what isn't. According to Company B, "We are making things more efficient with [5P Consulting's] help". The architecture map that we developed is still being utilized today, and has "proven to be very useful, flexible, and scalable."

We Are Part of the Team

By bringing diverse voices together, guiding the discovery process to be solution-oriented, and coming to the table with knowledge and expertise, we became an augmentation of Company B—developing a partnership instead of acting solely in the role of "consultant". How did we accomplish this?

- ◆ We took the time to discover the unique needs of Company B and to develop and customize systems and products that work best for them
- ◆ We were considerate of Company B's budget; spending money wisely and with transparency
- ◆ We delivered quality services on time
- ◆ We went back to the drawing board—when something was not working we accepted responsibility and, together with Company B, reworked a new solution

RESULTS

- ◆ The end-to-end business architecture was process and system generated, and as a result Company B was able to meet both their budget and headcount goal to run a LEAN organization.
- ◆ Pricing and Quoting of their services were built-in with standard product bundles and discounts, reducing the cycle time from approval of a deal to closure. This also fed commissioning on the sales team side.
- ◆ Customer Prospects were tracked, managed, and measured for quicker cycle times and opportunity closures which resulted in gaining revenue opportunities quicker.
- ◆ Improved intelligence with built-in system automation approvals of new contracts and upsells for existing clients.
- ◆ Post-sales servicing of customer accounts accomplished with ServiceNow for faster closure of customer tickets.

LEARN MORE

5P is a Business Transformation Firm delivering solutions through process and technology. We are a Salesforce Certified Consulting Partner and a ServiceNow Platform Integrator that delivers business and digital transformation initiatives. For more information reach out to us at info@5pconsulting.biz.