CASE STUDY
M&A: An Integration Story

Client Story: Two mature international product companies were purchased by a private equity company and merged. Post-merger they brought in a "Big 4 Consulting" company to help stand up the new organization's operations. As part of the charter of activities, they put new systems in place to help the new integrated company scale and run their business with data.

The first phase of the merger was to stand up new cloud based business systems for their financials, sales and professional services functions. The systems were implemented as stand-alone systems. As a result, a variety of key business functionality was missing, there was no governance or integration in place. This led to systems that couldn't fully run the business and bad data.

Business Needs: 12 months post-merger, this client needed an organization to come in and assess the challenges, put a roadmap in place to fix things, and turn it back over to the client to sustain and grow their processes with their current team.

They needed:
- An organizational assessment and recommendations of their people, processes and systems (ERP, CRM, PSA)
- A solution to fix their historical data issues and a proactive process to eliminate future data duplications
- A process for prioritizing all their business process and system enhancements based on monthly priorities in the business
- An operating model that scaled with their new merged business

What did 5P do?

- Conducted an assessment, gaps, and recommendations across Customer Service, Finance, Account Management, Sales and IT
- Renegotiated their product contracts for lower costs and right sized licensing needs to match their business
- Built an ongoing IT platform inventory, contract repository, and budget
- Built a meta data map and solution architecture map for the purposes of identifying authoritative sources of data and enhanced integration
- Built a monthly sprint plan model to deliver key business and technical solutions throughout the organization
- Coached the leadership team to partner on business trade-off decisions
- Put a global Change Advisory Board (CAB) in place
- Cleaned 'dirty' data that migrated over as part of the acquisition and developed an ongoing data reconciliation process
- Built integration across their ERP, CRM and PSA systems
- Implemented an incident process in place to tackle emergency and priority impacts to their ERP, CRM, PSA systems
- Implemented a change management process in place to gather requirements, conduct an impact assessment and plan enhancements to ERP, CRM, PSA systems in monthly releases.

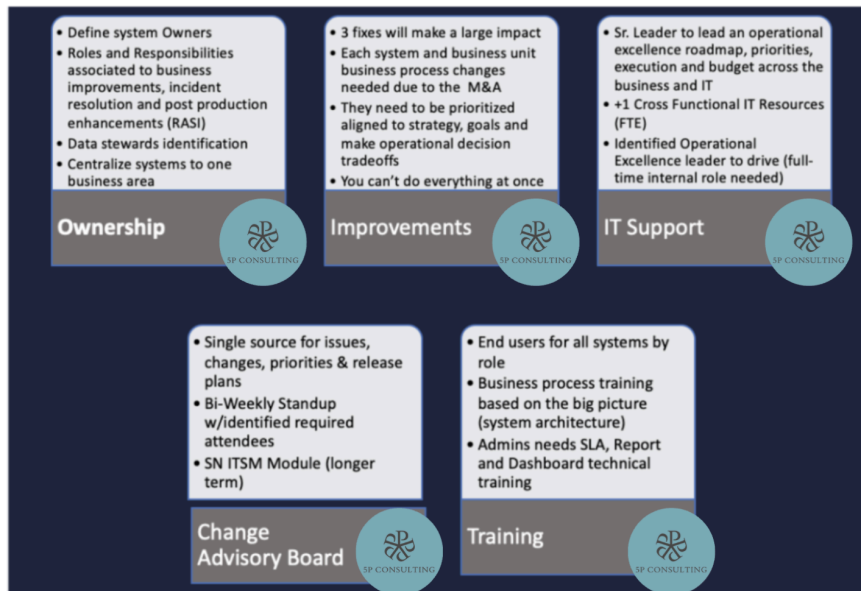## Executive Summary – Business Improvements

Feedback:
Based on my discovery sessions, 1:1s, review of team information you have 5 key gaps in your organization.

Key needs for success: Alignment on improvements, prioritization and incremental resources

18 open incidents and 26 post production enhancements

Detailed Gap Analysis: Link

Ownership
- Define system Owners
- Roles and Responsibilities associated to business improvements, incident resolution and post production enhancements (RASI)
- Data stewards identification
- Centralize systems to one business area

Improvements
- 3 fixes will make a large impact
- Each system and business unit business process changes needed due to the M&A
- They need to be prioritized aligned to strategy, goals and make operational decision tradeoffs
- You can't do everything at once

IT Support
- Sr. Leader to lead an operational excellence roadmap, priorities, execution and budget across the business and IT
- +1 Cross Functional IT Resources (FTE)
- Identified Operational Excellence leader to drive (full-time internal role needed)

Change Advisory Board
- Single source for issues, changes, priorities & release plans
- Bi-Weekly Standup w/identified required attendees
- SN ITSM Module (longer term)

Training
- End users for all systems by role
- Business process training based on the big picture (system architecture)
- Admins needs SLA, Report and Dashboard technical training

Detailed Project Workbook - Monthly Sprint Plan

This process and workbook was something that was part of the 5P framework which we brought into the client to manage activities to monthly buckets of priorities and budget needs for the Executive Leadership Team and the Change Advisory Board.

Metadata Map:

When we came into this engagement, there was no transparency or ownership on data. 5P built a meta data map to highlight what date comes from where. This allowed the client the ability to see how making data decisions in one system had a downstream effect into another resulting in data quality issues.
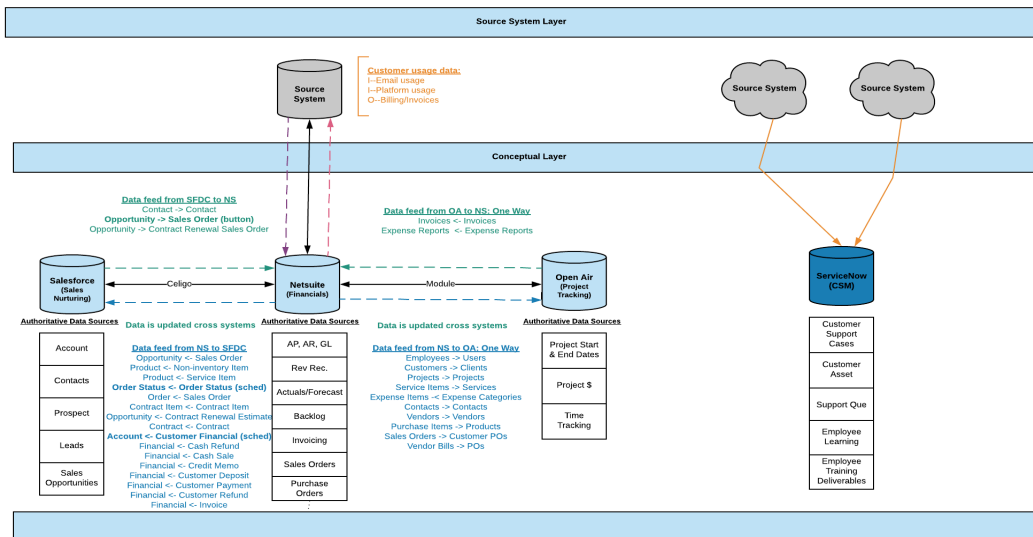
Results: The results of this engagement were….
- Improved business processes across finance, sales and customer service areas
- Integration across Netsuite, Service Now, Open Air and Salesforce
- Transparency to business data
- Team ownership and accountability
- Reduction of cycle time, costs and defects

Program Metrics:

	Completed/Closed (Executed)	Open (WIP)	Open (Not Started)	Total Count	Total % Complete
Program Action Items (Followup tasks)	79	8	1	88	90%
Program Requirements (Deliverables)	18	0	2	20	90%
Incident Log (Bug Fixes/Problems)	19	3	0	22	86%
Change Log (Enhancements)	34	7	37	78	44%
Total:	150	18	40	208	72%

Client Testimonial:

5P Consulting hit the ground running with a detailed assessment, organization and execution plan critical to our business' success. 5P also implemented a formalized process for managing the day-to-day operations and business demands for our corporate applications suite, which included our ERP, PSA, CRM and customer ticketing systems. An important part of the engagement was transparency around success and progress towards meeting our goals. 5P provided a weekly dashboard with both KPIs but also succinct qualitative takeaways, allowing executive leadership to quickly understand the status of key projects. Based on these details, we were able to quickly update priorities and tack as needed. 5P was very flexible with meeting our demands in regard to project time and skillset needs.