

Establish EPMO and Deal Transaction Process for Company Acquisitions

INITIATIVE: Implement EPMO for Company Acquisitions and Define the Deal Transaction Process

TOOLS & METHODS

- PMO Standards, Processes, and Templates
- Governance Processes
- Deal Transaction Lifecycle Definition
- Process Flows
- Risk Assessment Process
- Artifacts for Phased Deliverables
- Compliance Calendar Process and Integration
- Operational Dashboard
- Executive Dashboard
- BPO Transition Document
- BPO Hand-Off Checklist
- Measurement Process and Definition
- Monitoring and Control Processes
- Training: Executive and BPO Analysts

CHALLENGE:

Established Insurance Company was growing exponentially and required a means to better manage the execution of their deal transactions and integration of acquired operations as a result of their merger and acquisition activity.

ACTION:

Developed EPMO through establishing policies and processes while simultaneously creating a uniformed and repeatable Deal Transaction Lifecycle to support new business and shorten cycle time of acquisition. Identified key deliverable milestones with associated actions and decision making points along the lifecycle from opportunity assessment through execution. Defined integration process of acquired operations into a BPO for handling their backend processes.

Trained key executives, staff, along with the BPO partner and managed several mergers and acquisitions through the process in order to demonstrate its effectiveness, transparency of progress throughout the lifecycle, as well as make improvements based on learnings.

RESULTS:

- Established EPMO to manage mergers and acquisitions.
 - Creation of Deal Transaction Lifecycle to accommodate varies types of deals.
 - Checklists and sample deliverables to use as guides with documented instructions.
 - BPO checklists to ensure that scope of integrations were adequately assessed and that standards for testing, metrics, and policies for each type transaction were readily available.
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