

Our client is a globally recognized, Midwest headquartered professional services firm

Major cultural and operational issues put post acquisition integration efforts in jeopardy of failure

Our professionals assessed the situation, created mitigation plans and helped manage the integration forward successfully

Our efforts helped our client save \$1.5MM per month and position itself for future success

The Client:

Our client is a globally recognized professional services firm based in the Midwest that was looking to grow its business through acquisition.

The Challenge:

Our client's post acquisition integration with another professional services firm was stumbling. A series of organizational, operational, and process issues severely threatened the acquisition's success.

- The management cultures of the two firms were clashing as key stakeholders of the acquired company did not agree with our client's core management philosophies.
- Serious operational issues were uncovered at the newly acquired firm.
- Several key internal business processes at the acquired firm were poorly defined, executed and governed.

These issues, left unchecked for much longer, would have jeopardized our client's ability to meet annual strategic, financial and operational goals.

The Results:

We helped to dramatically accelerate the integration process through direct intervention. Our team assumed key management positions in order to drive decision making, execute process integration plans, and implement cost cutting measures. The acceleration of the integration process reduced operating expenses by \$1.5MM per month.

How We Helped:

Our professionals performed a post acquisition integration assessment in order to identify and prioritize high impact areas. Resultant from our assessment:

- We developed and executed a one month rescue plan to address the greatest cash drain issues including; loose bonus and expense policies and procedures; and poorly enforced HR policies that had exposed our client to possible high-value litigation.
- We planned and executed a two month short-term plan for addressing near-term priority organization and process issues including: payroll, hiring, business development, accounting, and financial reporting.
- We helped our client to rationalize their executive team to those who were committed to positive change and helping the company grow profitably.

While much of what we did was targeted toward fixing critical near-term issues, we helped our client stay mindful of the long-term, design sustainable processes, and avoid making similar errors in the future.

The Benefits:

Our client was able to successfully integrate the acquired firm; realize planned benefits from the acquisition; accelerate and sustain value realization of \$1.5MM/month; create a more stable and aligned management team; and position itself for more successful future acquisitions.



About Trillium:

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Trillium Solutions Group drives results by providing solutions and guidance in

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- Operations
- Program Management
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Trillium Solutions Group, Inc.
1954 First Street, Suite 204
Highland Park, IL 60035

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