

# CASE STUDY

## Business Transitions. Amalgamation and Integration.

### OPPORTUNITY

A multi-billion-dollar company diversified by targeting medium-sized credit unions and financial institutions, offering printing and clearing services to major banks. It partnered with a leading telecom company to enhance its offering and access skilled talent. After implementing an ERP and improving data quality, the company realized it wouldn't meet its two-year targets, prompting a strategic shift to ensure long-term success.

### SOLUTION

The company engaged our services to oversee the integration of the new wholly owned subsidiary with the parent company. A part-time senior executive with telecom and printing expertise joined, and his leadership and knowledge greatly benefited our collaboration. The project was completed three months early thanks to careful planning, effective communication, and strong collaboration. After the project's success, we oversaw a three-month integration at the parent company, ensuring smooth processes, employee comfort in new roles, and a positive transition.

### RESULTS

- **Process redesign:** We redesigned processes to align the new business unit's operations with the parent company, creating a unified framework for cohesive integration.
- **Talent and capacity analysis:** We conducted a talent and capacity analysis to identify resource gaps and design a talent strategy,
- **Role redesign:** We redesigned roles to clarify responsibilities, and ensure each role aligned with organizational goals.
- **Operations, Finance and Human Resources Integration:** We integrated operations and HR functions, unifying workflows and standardizing policies to create a cohesive culture, improve communication, and enhance collaboration.

### CONCLUSION

The project concluded with the issuance of a comprehensive end-of-project report. This report detailed the outcomes achieved, lessons learned, and recommendations for future initiatives. The successful amalgamation and integration have positioned the company for sustained growth and operational excellence.

### AT A GLANCE

#### Challenges

- Non-Scalable Business Model
- Data Governance/Quality
- Clients Acquisition - 2008 Downturn

#### Tailored Activities

- Hands-On Program Management
- Inventory Mapping/Evaluation
- Effective Talent Management Through the Transition

#### Tangible Results

- Operational Excellence
- Successful Integration
- \$250M Savings/Year



We've been in the trenches, led teams, and driven turnarounds. Over the past decades, we worked for Fortune 500 companies, start ups and everything in between.

With formal training and expertise in governance, corporate finance, risk management, and behavioral science. We led and delivered successful transitions and business transformation projects for clients with 500 to 10,000 employees, enabling \$20M-\$6.5B in sales, cultural alignment, and unique value propositions.

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