



M&A Integration Planning Essentials for Executives

Held in a boardroom setting with a maximum of 20 participants, this combination course and workshop is designed for management teams leading the transition from deal execution to operationalization.

Course Topics

Day 1: Essential Elements of Integration Planning

Defining the integration challenge

- Pre-close technology and operation due diligence
- Risk assessment & mitigation planning
- Integration resourcing requirements
- Scorecards and metrics
- Collaboration essentials

Establishing the Strategic Framework

- Developing business goals & integration strategy
- Identifying value drivers
- Converting strategy to integration planning direction

Mobilize Integration Governance

- Establishing integration governance
- IMO roles & responsibilities
- Internal resourcing guidelines

Day 2: Essential Elements of Integration Execution

Execution Mobilization

- Data harvesting
- Mobilizing the IMO process
- Creating tools and templates

Functional Workstream Development

- Phasing and prioritization
- Day 1 and communications planning
- Preparing for unique M&A scenarios

Building an Internal Competency

- Integration process optimization
- Integration playbooks
- Readiness and playbook methodology training

Target Participants

Corporate leaders preparing for strategic acquisitions. Senior leaders in Corporate Development, Strategic Planning, Program Management, Finance, Legal, Operations, IT and HR

Format

- 2 Day executive course and workshop
- Boardroom setting
- Boardroom environment
- Maximum 20 participants
- Course materials provided to all attendees
- Breakfast and snacks provided

Dates and Location*

See website for upcoming dates

*Additional dates and locations available for custom delivery.

Pricing*

\$3,450 USD per attendee. \$2,950 USD per attendee if registered 60 days prior to course start, or for companies with 3 or more participants.

*See cancellation policy

Instructors

The session is delivered by senior Partners of Global PMI Partners, a professional services firm focused exclusively on M&A integration. Formed in 2009, Global Post Merger Integration Partners has local operations across North America, as well as international partners in Europe, Asia, Australia and the Middle East. Our Partners are highly experienced and average 27 years of professional experience and have delivered more than 250 PMI projects.

Cancellation Policy

Cancellations or deferrals must be submitted in writing more than 30 days before the program start date to receive a full refund less 10% processing fee. Due to program demand and the volume of pre-program preparation, cancellations or deferrals received less than 31 days before the program start date will be charged in full.



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