



M&A Integration Planning Essentials for Executives

Held in a boardroom setting with a maximum of 14 participants, this combination course and workshop is designed for management teams leading the transition from deal execution to operationalization.

Course Topics

Integration Conceptualization

- Defining the integration challenge

Pre-Deal Considerations

- Assessing integration risk: operational and technology due diligence
- Collaboration essentials: how to work with the target before close and managing information

Establishing a Strategic Framework

- Creating actionable integration strategies and business goals
- Establishing the right integration governance structure for your organization
- Preserving value and driving momentum into the acquired business
- Establishing a discovery process for integration planning that is compliant and empowers integration leads
- Creating an integration governance structure that can deliver on integration objectives and business goals

Integration Planning

- Data Harvesting: Managing the integration planning discovery process to inform integration planning
- Resourcing guidelines and integration roles & responsibilities
- Obtaining executive support for the time and resources needed to make integrations successful
- Integration planning to properly scope and structure the most complex integration workstreams

Integration Delivery

- Helping functional leaders plan and execute their respective workstreams for a flawless Day 1
- Understanding how to manage cross border integration requirements
- Risk assessments: helping identify and mitigate issues early
- Creating a robust and sustainable integration competency for your organization

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 14 participants
- Course materials provided to all attendees
- Breakfast and snacks provided

Dates and Location*

September 17th – 18th, 2015, San Francisco, CA

November 16th-17th, 2015, San Francisco, CA

January 11th-12th, 2016, Atlanta, GA

*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 2010, 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.



Contact Sheila Mayfield for more information and to enroll:
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