



## CRISP™ Initial Viability Tool

Welcome to the confidential CRISP™ Initial Viability Tool.

Not all enterprises benefit from adopting the CRISP™ Method.

The purpose of this tool is to objectively assess the viability of using CRISP™ to successfully optimize M&A execution given the the context and characteristics of your organization. Answers to upcoming multiple-choice questions are the inputs to a CRISP™ trained AI GPT decision system. The training is based on CRISP™ development documents and anonymized client artifacts. **There is no deliberate bias or skewing toward adopting the method inherent in the training material or recommendation prompts.** After submission, the answer data will be uploaded and a **broad stroke analysis and recommendation** will be generated and returned to the contact email. Turn-around goal is 4 hours or less due to a human review process.

Your data is considered confidential and not part of any public training. Use of the required email address for follow-on marketing purposes is not allowed, unless it matches an address where permission was granted. Using the tool grants permission to send the analysis results to the email address input below.

You are 11 questions away from knowing whether optimizing your organization's execution of M&A transactions is possible by adopting CRISP™.

**youremail@yourdomain.???**

February 1, 2025 5:46 PM - 00:02:42 - Middlesex, United States - Windows 10 - Edge 132

**Q1** How often does your organization engage in M&A transactions? \*

Frequently (6-10 per year)

**Q2** What is the typical size (in terms of deal value) of your M&A transactions? \*

Very large (Over \$250 million)

**Q3** Which best describes the primary purpose of your recent transactions?

Operational synergies or cost reduction

**Q4** How structured is your organization's current M&A integration process? \*

Very structured (detailed, highly coordinated process)

**Q5** Which roles primarily lead M&A integration efforts in your organization? \*

Dedicated Integration Management Office (IMO)

**Q6** What are your top challenges in M&A integrations? (Select up to 2) \*

Coordinating deliverables and timelines  
Reducing unnecessary meetings or delays

**Q7** How critical is real-time communication and data sharing during integrations? \*

Important (frequent updates needed)

**Q8** To what extent do you use technology to manage integrations? \*



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Extensive (custom or highly integrated solutions)

**Q9** Which best describes the nature of your integration teams? \*

Predominantly internal teams

**Q10** How important is it to your organization to be prepared for future AI-driven solutions in M&A integrations? \*

Important

**Q11** What is your role within the organization?

Corporate Development or M&A Lead

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Based on the responses provided in the document, **CRISP™ appears to be a strong fit for the respondent's organization.** Below is the structured analysis and recommendation:

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### CRISP™ Viability Analysis and Recommendation

#### Analysis:

#### 1. Frequency and Scale of Transactions

- The organization engages in M&A **frequently (6-10 per year)** with **very large deal sizes (over \$250 million)**.
- This level of activity benefits from **structured, repeatable processes** to ensure consistent execution, making CRISP™ a potentially valuable addition.

#### 2. Primary Purpose of Transactions

- The focus is on **operational synergies and cost reduction**, which often requires **precise coordination, risk management, and efficient execution**.
- CRISP™'s structured deliverable-based approach helps reduce inefficiencies, which aligns well with this objective.

#### 3. Integration Process and Challenges

- The organization's **integration process is already highly structured**, meaning that they likely have established methodologies in place.
- **Challenges include coordinating deliverables and reducing unnecessary meetings/delays**, both of which CRISP™ directly addresses by eliminating noise, streamlining execution, and ensuring timely deliverable handoffs.

#### 4. Communication and Technology Use

- **Real-time communication is important** (frequent updates needed), which aligns with CRISP™'s structured information-sharing model.
- The organization already uses **extensive technology solutions**, meaning CRISP™ can integrate with their existing tech ecosystem without requiring significant infrastructure changes.

#### 5. Integration Teams and Leadership



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- The **Dedicated Integration Management Office (IMO)** leads M&A integration, which suggests a structured team is already in place to **adopt and implement a more effective methodology like CRISP™**.
- The teams are **predominantly internal**, which allows for better internal alignment—another area where CRISP™ is designed to add value.

### 6. Future Readiness

- The organization finds AI-driven solutions **important**, meaning they are already thinking about automation and data-driven decision-making.
- CRISP™'s **AI readiness and structured data framework** would support future initiatives in AI-assisted integrations.

#### **Recommendation:**

**CRISP™ is a highly viable method for this organization.** Given the frequent and large-scale nature of transactions, the presence of an IMO, and a strong emphasis on reducing delays and improving coordination, CRISP™ would **enhance execution efficiency, improve alignment across teams, and eliminate unnecessary friction in integration processes.**

The organization should consider a **CRISP™ adoption strategy that integrates with their existing structured workflows**, leveraging the **deliverable-based methodology** to maximize value.

Additionally, the method's AI-readiness can **position them well for future automation in M&A integration.**

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For additional information on whether CRISP™ can benefit your organization, please reach out directly to Cris Casey by phone at 646 770-4585 or email at [casey@crispmethod.com](mailto:casey@crispmethod.com).