



## 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@yourdoamin.???**

December 6, 2024 2:47 PM - 00:03:24 - Barrington, United States - Mac OS 10.15 - Firefox 133

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

Rarely (1-2 per year)

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

Medium (\$10 million - \$50 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? \*

Basic (some templates or guidelines)

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

Corporate Development or M&A team

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



## CRISP™ Initial Viability Tool

Coordinating deliverables and timelines  
Identifying integration risks early

**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? \*

Moderate (basic digital tools, e.g., Excel)

**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? \*

Somewhat important

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

Executive Leadership (CEO, CFO, COO)

### Recommendation

Based on the survey responses provided in the document, CRISP™ might not be the most suitable solution for the respondent's organization at this time. Here's the analysis:

- 1. Frequency and Scale of Transactions:** The organization rarely engages in M&A transactions (1-2 per year) with medium-sized deals (\$10 million - \$50 million). CRISP™'s structured and scalable approach is typically more beneficial for organizations with frequent or larger-scale transactions.
- 2. Primary Purpose of Transactions:** The focus on operational synergies or cost reduction suggests the organization prioritizes efficiency and cost management. These goals may not fully leverage CRISP™'s strengths in communication and deliverable alignment, which are more impactful in complex, multi-functional integrations.
- 3. Integration Process and Challenges:** The organization's integration process is basic, using some templates or guidelines, and the primary challenges are coordinating deliverables and identifying risks early. CRISP™ could address these issues by introducing more structure, but



## CRISP™ Initial Viability Tool

the low transaction frequency might not justify the investment in adopting CRISP.

4. **Real-Time Communication and Data Sharing:** Real-time communication is important, with frequent updates needed. CRISP's emphasis on communication and alignment could add value, though simpler solutions may achieve similar results at a lower cost.
5. **Technology Use:** The organization uses moderate digital tools, such as Excel, which aligns with CRISP™'s flexibility to operate in basic technological environments. However, their reliance on simpler tools suggests they may prefer lower-complexity solutions.
6. **Nature of Integration Teams:** Predominantly internal teams led by a corporate development or M&A team indicate a structured leadership group. However, the modest scale and infrequency of transactions may not demand the comprehensive coordination that CRISP™ provides.
7. **Future AI Preparation:** Some interest in AI-driven solutions indicates potential future benefits from CRISP™'s future-ready capabilities, but this is not currently a priority.

**Recommendation:** CRISP™ could enhance the organization's ability to coordinate deliverables and manage risks during integrations, but its broader benefits may not be fully utilized due to the infrequent and moderate-scale nature of transactions. A simpler, efficiency-focused solution tailored to operational synergies and cost reduction may be more practical. CRISP™ could be reconsidered if the organization increases its transaction frequency or complexity in the future.

---

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).