



## Foundation for Leveraging Organizational Workstreams

# The Basis for Executing Successful M&A Transactions

## The Core Concept

At the heart of every successful enterprise-to-enterprise M&A transaction lies a fundamental truth:

**Timely exchange of mission-critical data is essential.**

Regardless of the transaction's size, complexity, or nature—and independent of the strategy, planning or management techniques employed—this principle remains constant. Without meaningful data exchange, progress stalls completely.

## The CRISP™ Method: Key Foundational Assumptions

The CRISP™ Method builds upon four critical assumptions about how successful transactions operate:

### 1. Individual Action Drives Success

While teams are useful as an organizing concept:

- Success depends on the collective efforts of **individuals** producing, exchanging, and utilizing mission-critical data.
- The sum of these individual contributions determines whether an initiative exceeds, meets, or falls short of expectations.

### 2. Mission-Critical Data is Predictable

For most participants, the essential information they need is:

- Limited in scope
- Known well in advance of when it's actually required

### 3. Process Sets are Well-Established

Executing M&A initiatives rarely involve creating new ways of getting things done:

- The necessary processes—at macro, mid, and micro levels—are already familiar to subject matter experts (SMEs) within each organization.
- These processes define what actions need to be taken to achieve specific results (such as onboarding an employee).



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### 4. Most Obstacles are Self-Generated

Given items 1-3 above, it follows that delays and confusion typically stem from unintentional "noise" created by:

- Existing inefficient or counter-productive practices
- Absence of established practices
- Faulty, misdirected, or missing messaging

### How CRISP™ Addresses Each Assumption

#### Individual Action

While teams are essential for strategy and planning, individual contributors ultimately bear responsibility for delivering results. Anything that interferes with contributors' ability to deliver should be avoided. Scientific research and practical observation supports the negative impact of disruptions from:

- Numerous requirement-gathering meetings
- Repetitive status updates
- Unexpected interruptions

These disruptions are particularly problematic because most contributors must balance their regular responsibilities with special initiative work. Neuroscience research confirms that forced multitasking (what happens when interruptions occur) degrades performance across all areas of responsibility.

The CRISP™ Method minimizes distractions through carefully designed protocols and artifacts. These ensure clarity between contributors regarding what will be delivered, when, and where.

#### Known Data

Most mission-critical data already exists somewhere in the buying or selling organizations. At the highest level, the Purchase and Sale (P&S) agreement outlines both high-level requirements (key dates, personnel) and often granular details (asset transfers, individual services).

A simple test identifies truly mission-critical data: **If, in the service of initiative, someone cannot perform their job because they lack specific information, that information is mission-critical.**

Decades of feedback from initiative participants confirms that the primary cause of delivery issues is SMEs not receiving what they need from people outside their work-



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streams (cross-functional/cross-entity or *CF/CE*) when they need it. This problem affects all organizational relationships—not just the stereotypical "business vs. technology" dynamic, but also between Operations and HR, Finance and Risk, and all other work-stream combinations.

The CRISP™ Method addresses this challenge by focusing exclusively on *CF/CE* data exchange. All other data remains confined within its respective work-stream, maintaining focus and reducing noise.

### Known Process Sets

Consider essential M&A processes like payroll integration. In most organizations, the steps required to pay employees are well-established:

- HR determines who gets paid and how much
- Finance determines how money flows and is accounted for
- IT implements systems to support HR and Finance

What's unknown isn't the process itself but the specific data— in this example, who the new employees are and their details. Problems occur when this information exists but doesn't reach those who need it to perform the process, in a timely manner or form.

The CRISP™ Method efficiently identifies necessary *CF/CE* deliverables through focused activities and makes them available through key artifacts. This ensures that contributors—whether from Finance setting up bank accounts or IT establishing email systems—receive the data they need when they need it.

### Self-Inflicted Noise

Noise manifests in many forms throughout an initiative:

- Email: convoluted, excessive, redundant, contradictory
- Meetings: irrelevant, unstructured, repetitive
- Interruptions: direct/instant messaging, physical visits, calls

This noise typically stems from entrenched organizational behaviors embedded generally in enterprise culture, and specifically in work-stream processes and policies.

While individual work-stream members often develop coping mechanisms for internal noise, *CF/CE* noise creates significant challenges. When disruptions come from outside your work-stream, workarounds are limited and miscommunication becomes likely.



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Particularly problematic in the context of M&A activities are interruptions caused by searches for missing information. These create chains of disruption through emails, calls, and messages that consume effort throughout the organization; a variation of “death by a thousand cuts”. Typically, the needed data was already available long before the search began.

The CRISP™ Method mitigates noise by replacing chaotic, disjointed data collection with predictable, focused protocols and artifacts.

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This is a condensed excerpt from the CRISP™ Foundation for Leveraging Organizational Work-streams (FLOW). FLOW describes the foundation (principles, methods, and artifacts) on which CRISP™ is built and is available as a standalone product. Contact [crisp@exertusinc.com](mailto:crisp@exertusinc.com) for purchasing details.