



M&A Process & Project Management Effectiveness

Completing the following scorecard will provide a quick, high-level view of how well your organization handles several of the most essential aspects of M&A process and project management.

Steps to complete the assessment:

- Rate each item on a scale of 0 (poor) to 10 (excellent).
- Make notes for each item to explain the rationale for the numerical rating.
- Add all ten scores to get a TOTAL SCORE (maximum score = 100).
- Identify priority improvements to address and strengths to leverage.

Answer each question below considering your current methodology / approach for dealing with these common M&A process and project management requirements, along with the typical results, issues or outcomes you experience.

“How effective is our current M&A process & project management approach at...”

Question to Consider:	Score (0 – 10)
1. ... defining and managing M&A as a comprehensive, end-to-end process lifecycle including strategy & readiness, targeting, transaction / due diligence, through to “integration complete?”	
2. ... providing real-time executive-level dashboards, performance reports and status indicators that are configurable and flexible to meet ongoing or one-time inquiries?	
3. ... streamlining and automating low-value added tasks to free executives and project leads to focus on essential actions?	
4. ... allowing for quick configuration and customizing of tasks, timelines, objectives and integration priorities for each new deal, including consideration for “deal-type DNA” or unique diligence or integration issues?	
5. ... highlighting, tracking and visualizing specific cross-functional dependencies between different project teams (including both upstream and downstream dependencies)?	
6. ... assigning and managing tasks, milestones and deliverables with real-time notifications and “on-track” or “at-risk” indicators?	
7. ... monitoring synergy project timelines, execution and outcome measures?	
8. ... focusing integration team leaders, team members and subject matter experts on their specific, role-based tasks, assignments and deliverable timelines to support on-time execution and accountability?	
9. ... efficiently managing, updating, storing and deploying all deal and integration documents, including templates, tools, samples and “lessons learned?”	
10. ... enabling highly secure, scalable, “anywhere / anytime access” combined with a simple, clean, easy-to-use interface?	
Total Score (Maximum = 100)	
