





Financial Visibility

Organization Strategy Process Alignmen Personnel Alignment

End in Mind

- Financial Comparability
- Financial Health
- Operating Budgets
- Management Dashboards
- Financial/Scenario Modeling
- Financial Fluency and Training
- Organization Identity
- Organization Visioncasting
- Organization Tactical Planning
- Market Feasibility Studies
- Build/Buy/Grow Advisory
- Pricing Strategy

- Organization Optimization
- Lines of Authority
- Process Optimization
- Internal Control Environment
- Team-based Integration
- Post-close Deal Integration(s)
- Connecting Roles to Org
- Key Performance Indicators
- Compensation Benchmarking
- Incentive and Comp Planning
- Performance Management
- Leadership Training

- Value Created
- Transition Planning
- Wealth Planning
- Organizational Goal Alignment
- Executive Coaching
- M&A Facilitation (See reverse)











Revisit Periodically Risk Mitigation

Continuity

Repeatability

Predictability

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Value Creation



M&A Facilitation:

