

# TACTICAL BI

## BRIDGING THE POST-MERGER GAP WITH NIMBLE DATA SOLUTIONS

Post-merger integration activities create needs for information and reporting that are not easily supported by legacy systems. Controllers, the CFO, and many others are thirsty for data to help steer the business, validate key decisions, and realize a deal's anticipated benefits. Everyone wants data and analysis yesterday, but it takes time to integrate systems. Enterprise resource planning (ERP) systems, while effective at processing large volumes of transactions, are not nimble enough to deliver change quickly. Adding to the delay is the fact that resources assigned to integration activities usually retain their "day jobs," which leads to lack of focus.

### The Challenge

Management needs fast access to valuable financial data and business intelligence (BI) that comes from consolidated reporting and mapping of disparate data structures across multiple groups and applications. But the process of getting this information is time consuming, costly, and sometimes never happens.

### Typical Solution: Death By Spreadsheet

Interim reporting tools and data solutions are needed to buy time for larger integration efforts. However, in most organizations, interim reporting solutions are brute force spreadsheet exercises that introduce risk, dilute data quality, and add to the effort required to streamline systems over time. They do not meet controls or audit standards, and can jeopardize business results. They do not force alignment, but instead enable business as usual.

### Alternative Solution: Tactical BI Tools

Tactical BI solutions avoid the pitfalls of interim reporting tools. They foster adoption, are built with appropriate controls, and provide baselines for future efforts. They also cleanse data and improve quality, allow dynamic mapping of source data, and provide conversion support. They are easily updated, based on common technologies readily available within the enterprise, and are built to stand the test of time. They provide not only data consolidation, but also analytics reporting for decision support. In addition, tactical BI solutions are delivered in a matter of weeks, so throwaway costs are minimized.

### Tactical BI Solutions

MorganFranklin delivers tactical BI and reporting solutions immediately following mergers and acquisitions (M&A). We help post-transaction companies focus resources on long-term integration planning without missing critical accounting and reporting deadlines. Our teams combine expertise in accounting, finance, and data management to help companies:

- Reduce spreadsheet risks
- Automate and standardize processes for critical data using low-cost technologies
- Develop dynamic financial modeling covering multiple dimensions and scenarios
- Automate controls monitoring over data
- Mine data from ERP systems/data warehouses for analysis and reporting
- Convert and cleanse legacy system data
- Consolidate data into purpose-built tools

## IMPACT & VALUE

- Build focus on high-value analysis while supporting current business needs
- Reduce spreadsheet risks
- Minimize throwaway investments
- Buy time for strategic evaluation of future-state alternatives
- Gain visibility into key data that will be informative and reusable during conversion

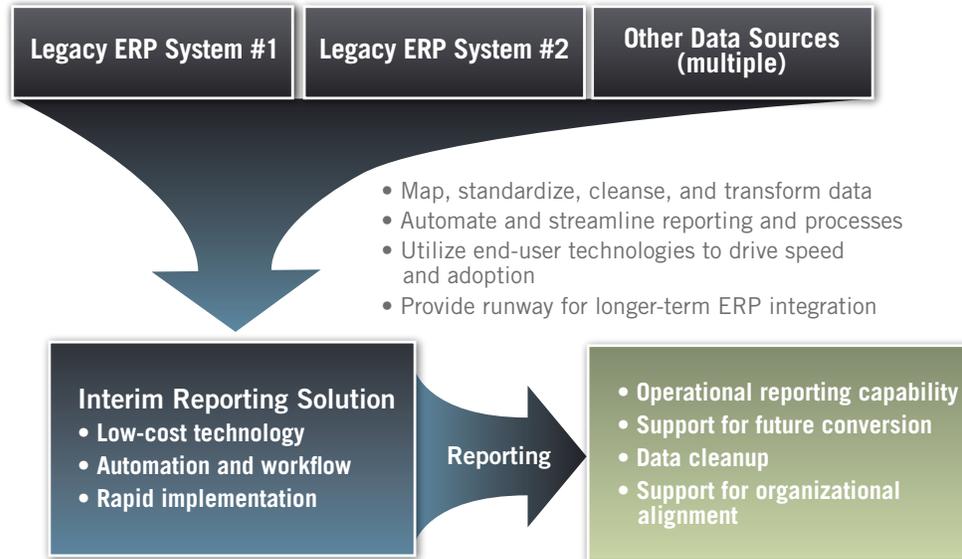
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## Our Approach

Following a merger or acquisition, it may take several years to consolidate applications and provide integrated reporting capabilities. But information needs cannot wait. Tactical BI solutions accelerate the progression from current challenge to future efficiency. MorganFranklin's tactical BI solutions are focused on delivering results fast, affordably, and without disruption. We apply an accelerated approach to drive solutions and rapidly consolidate ERP data.



## WHAT'S AT RISK?

### You can't manage what you can't see. The implications of poor data in M&A:

- Increased risk of inaccurate financial reporting
- Delayed realization of contemplated benefits
- Reduced transaction value
- Disruption to strategic roadmap
- Islands of data or lack of a "single version of the truth"
- Increased support costs for enterprise systems
- Overstaffing
- Process inefficiencies

## About MorganFranklin Consulting

MorganFranklin is a strategy and execution-focused business consulting firm and professional advisor. We provide strategic thinking and hands-on support to help clients manage growth and maximize performance. Our solutions always consider the key connections between finance and accounting, operations, technology, and risk—connections that are critical to success. Clients say that our responsiveness, flexible style, and fast access to proven professionals make us an invaluable business partner and advisor.

## Test the Waters

We have created numerous diagnostics to help companies quickly assess the level of effort required to implement tactical BI solutions for financial and management reporting following a merger. We also offer diagnostics to evaluate key personnel dependencies and uncover critical data gaps. Most are interview-based, inexpensive, and require limited data from legacy systems, which does not need to be translated.