



Advancing Acquisition Capabilities

A BridgePoint Case Study

THE SITUATION

Our client acquired a business equal in size to the existing business and with similar value propositions, which was unscalable and high cost. The goal was to decrease operating costs by 25% to meet deal value and develop a cross over strategy for IRA rollovers at a significantly higher capture rate.

Key Facts Highlighting Our Client’s Challenge:

“High Touch” practices	Unscalable and high cost
Overlapping product sets	Lacked parity with the market
Enterprise capabilities	Migration to firm-wide

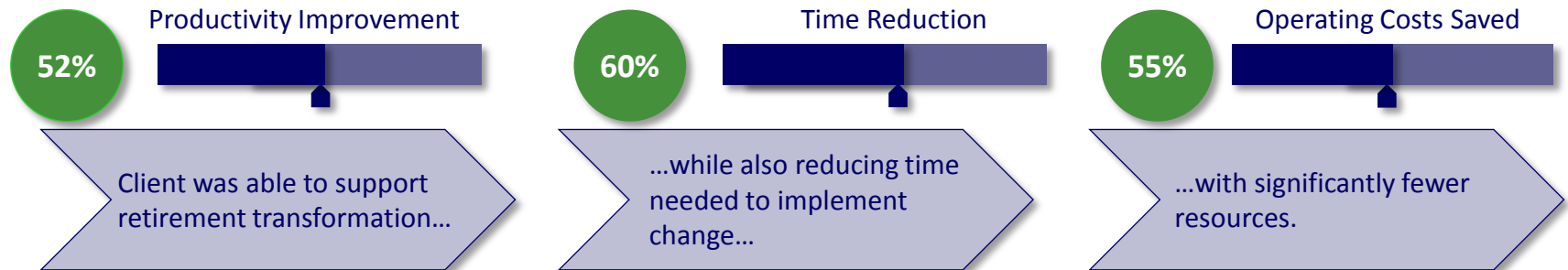
THE APPROACH

Our client performed their due diligence and built a transformation team with defined capacity, roles and processes. The client was able to baseline both organizations simultaneously by running a fully integrated team.

They adopted a comprehensive change management plan for clients and associates to allow for a smoother transition across organizations. Additionally, our client was able to design a Go-To Operating Model, a Customer Experience and Service Model Strategy, and an Integrated Product Strategy.

Revenue and expense models for post-deal were established, which, in turn, informed the deal value.

THE BUSINESS RESULT*



The client now enjoys a broadened definition of success, which includes a credible roadmap for multi-year evolution to a new operating model while being on target to realize the original deal value.

*Anticipated results based on projections