

EY Rapid Foundation for M&A

Helping fuel financial synergies for mergers, acquisitions, divestitures and startups



Business drivers

Integrations, separations and incubations come with technology challenges that can inadvertently cause a delay in synergies. Separating or standing-up new systems is a necessity, but long integrations and implementations increase manual processes, prevent accurate and timely reporting and threaten business continuity. While standardization can help reduce risk, it must be crafted for the future on a broad platform designed for growth and innovation.

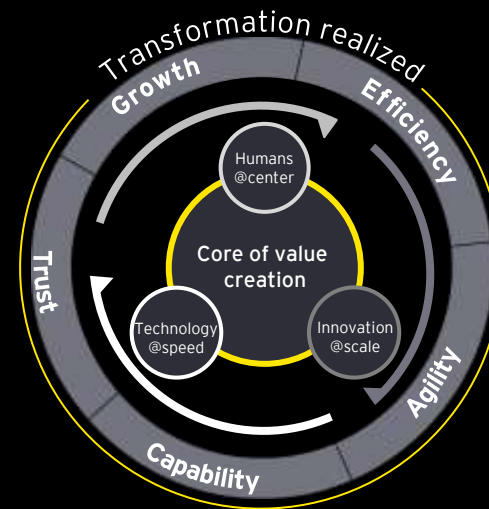
Solution overview

Organizations with accelerated growth strategies benefit from a preconfigured finance and sales solution with the ability to scale as the business moves forward.

This EY accelerator, built upon Microsoft Dynamics 365, allows for the stand-up or separation of a legal entity, aiding speed to value for mergers, acquisitions, divestitures and startups.

It includes:

- ▶ Baseline configured solution with a standard and documented process
- ▶ Pre-defined project, training and data migration artifacts
- ▶ Design documents, project plans and Azure DevOps project structures
- ▶ Pre-developed test scripts and role-based security management
- ▶ Chart of Accounts (CoA) structure based upon EY teams leading-class practices
- ▶ Future state roadmap
- ▶ Application support



Solution benefits

- ▶ Reduce risk through a templated approach
- ▶ Speed up design and build, using “why not” design thinking
- ▶ Fast-track planning and reduce cost
- ▶ Reduce transitional service agreement (TSA) costs and support
- ▶ Go-live in as little as 16 weeks
- ▶ Support evolving business models
- ▶ Manage spending across geographies with process automation, budget control, financial planning and analysis
- ▶ Measure and report consistently across the business
- ▶ Facilitate immediate collaboration across limited resources
- ▶ Deploy Secure Cloud and SaaS-based solution, independent of on-premises infrastructure



Leading practices

Industry templates



Joint value proposition

- ▶ EY teams' business ingenuity + Microsoft intelligent technology = Exponential impact.
- ▶ Business innovations born out of EY teams' trusted industry experience create long-term value for clients.
- ▶ Microsoft cloud solutions that unlock data to be a catalyst for change.
- ▶ Together, we help organizations create exceptional experiences that help the world work better and achieve more.

Solution differentiators

- ▶ Based upon EY teams leading-class practices
- ▶ Ready access to EY business consulting experience in mergers, acquisitions, divestures and startups
- ▶ Extensive EY library of industry-specific process flows, controls and integrations with legacy systems
- ▶ Dedicated, specialized resources for complex tax scenarios
- ▶ Built upon the broad, integrated Microsoft cloud that spans – security, infrastructure, digital and app innovation, data and AI, business applications and modern work

Case study

A renewable energy generator was looking to implement their first-enterprise ERP system to streamline integration of newly acquired businesses. Their needs included security guidelines to mitigate risk and developing end-to-end business processes.

Client challenges

- ▶ Client historically used a small accounting system which required multi-step manual processes to complete tasks.
- ▶ The client outgrew the legacy system and required a full-scale ERP system to handle their day-to-day operations and provide financial capabilities.
- ▶ Lack of oversight into purchasing due to limited functionality in legacy system.
- ▶ Due to lack of clarity of role definitions and security guidelines, and the nature of the business, individuals played multiple roles.

Engagement summary

- ▶ Integrations between all systems to provide centralized financial and operational data.
- ▶ Microsoft Power BI was enabled for all the business modules to provide key business insights.
- ▶ Real-time performance dashboards for business functions for better decision-making.
- ▶ Approval workflows to increase leadership insight into operational spend.
- ▶ Roles and responsibilities defined with security permissions in relation to individuals' daily tasks.

Value delivered

- ▶ Implemented a cloud-based ERP system which allows the client to manage their existing businesses, as well as to support growth via acquisition.
- ▶ Facilitated robust and holistic reporting for better management oversight.
- ▶ Helped reduce manual activities by leveraging automation and ERP utility.
- ▶ Offered a unified view into the finance and operations efforts across the entire business.
- ▶ Armed individuals with a strong knowledge base of not only Microsoft Dynamics 365, but also leading practices for their relevant business processes.

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