M&A Workshop Planning

Workshop Vision Statement:

For the Lead to Cash process for (***Acquired Company***), map out current state end to end to allow us to create a map to future state to ensure that we can successfully complete a migration to the (***Your Company***) Tech Stack by (***Deadline***).

This discussion will occur in 3 phases:

1. Lead to Contract
2. Onboarding/Implementations
3. Service

The end product will be two things:

1. Clear understanding for teams of how to execute work now and upon a successful migration.
2. A future state map for (***Deadline***) that will allow us to identify any action items to meet that target date.

Workshop Dates

1.

Workshop Attendees:

1. Marketing / Lead Generation (Acquired/Your Company)
2. Sales (Acquired/Your Company)
3. CRM Owners (Your/Acquired Company)
4. Contract Operations
5. Legal
6. Pricing/CPQ
7. Operations / Customer Support
8. Billing
9. Finance
10. Incentives
11. Change Management
12. Technology
13. Security

Deep Dives Seperate from Workshop:

Items that aren't a part of mapping current state, but will help to ensure a smooth transition.

1. Pricing
2. Rules of Engagement
    a. Finance/Sales rules of engagement for sales team
3. Product Configuration

Acquired Company's Tech Stack:

1. Marketing Automation
2. CRM
3. Operational/Fulfillment Databases
4. Billing
5. Incentive

Your Company's Tech Stack:

1. Marketing Automation
2. CRM
3. Operational/Fulfillment Databases
4. Billing
5. Incentive

Workshop Outline (Lead to Cash):

1. Master Data
    a. Account
    b. Product
2. Lead
    a. Website capabilities and migration plan.
        i. Web to Case
        ii. Web to Lead
    b. Marketing automation platform.
    c. Lead Routing
3. Sales
    a. Account Management.
    b. Contact Management.
    c. Opportunity Management.
    d. CPQ/Quote Generation.
    e. Territory Management.
        i. Account assignment
    f. Billing
        i. How are customers billed?
    g. Incentive
        i. How are payments processed?
4. Contract Processing
    a. Where are contracts submitted?
    b. Who and how they are signed?
5. Onboarding
    a. How does the customer get onboarded?
    b. Where is the customer fulfilled?
6. Service
    a. Where is the customer serviced?
    b. How are requests received?