



# Merger and Acquisition Integrations Increase Sales and Reduce Client Churn

## SOEE what's new...

As employers continue to expand and grow through mergers and acquisitions, additional alignment and coordination of Sales Operations, Sales Enablement, Sales Effectiveness (SOEE) will be required.

In many cases, integration efforts stretch internal resources, impact new sales, and effect client assimilation. During this time, valuable opportunities for cross selling are missed and existing clients are vulnerable to cancellation.

**Strategy, tactical execution, and speed are critical to market disruption and revenue synergies.** Visionary leadership and management of competing priorities become instrumental to integration success.

## SOEE what's the solution...

The following information will outline key areas that impact sales performance, product adoption, client retention, and profitable revenue growth.



**Data Interpretation and Management** - evaluate key data attributes that align strategy, segmentation, analytics, and business development. Analytics and strategic segmentation will support targeted cross selling and client retention initiatives.



**Process Design and Configuration** - assess current process, within each acquisition, to develop and prioritize enterprise business intelligence. Enterprise process design will further drive revenue growth through effective data management and improve analytical insights.



**Enabling Technology and Roadmap** - evaluate CRM and adjacent technologies to define and build the integration roadmap. The technology priorities are further guided by data interpretation, process configuration, analytical insights, and reporting requirements.



**Analytical Insights and Reporting** - key performance indicators and dashboard development will ensure focused execution on data management, process design, and enabling technology. Ongoing measurement will create strategic and tactical alignment of business imperatives.

Significant details exist within each area outlined. Taking time to analyze the entire client journey from business development through boarding, fulfillment, and customer success will assist with planning efforts.

## SOEE what's the value...

Acquisitions represent a pivotal point in revenue capture, product adoption, sales performance, and client retention. In addition, cultural integration will set the pace for innovation, creativity, and develop a new outlook for the client experience. Market perception of the acquisition integration and strategy will have a significant impact on sales performance and client retention.