



M&A Competency Scorecard

INSTRUCTIONS

- Rank the importance of a given competency for each stage in the M&A lifecycle as low, medium or high.
- Rank your organization's performance against a given competency for each stage in the M&A lifecycle as low, medium or high.
- Identify gaps / priority areas where importance is high and performance is low or medium.

Competency	Stages of the M&A Cycle							
	Originating		Qualifying		Due Diligence & Integration Planning		Integration Execution & Optimization	
	Importance	Performance	Importance	Performance	Importance	Performance	Importance	Performance
Leadership, Experience and Expertise <ul style="list-style-type: none"> • Does your organization have the leadership capacity and deal experience / expertise to successfully execute your M&A strategy? 								
M&A Organization Structure / Governance <ul style="list-style-type: none"> • Are roles and responsibilities clear at each stage in the M&A lifecycle? • Is it clear who has decision making authority at each stage? 								
Repeatable Methods and Tools <ul style="list-style-type: none"> • Are the core M&A processes, checklists, reporting and tools defined and documented? • Is there a process for continuous improvement across deals? 								
Approach to Change Management <ul style="list-style-type: none"> • Is there a defined approach to identifying the behavioral changes and impacts of the deal supported by the required processes, tools and skills? 								
Information Technology Platform <ul style="list-style-type: none"> • Is there a secure data management platform for regulatory compliance? • Do roles and workflows support cross-functional and cross-enterprise collaboration? 								

When action matters, find us at:
www.alvarezandmarsal.com

