Change is expected in the context of mergers and acquisitions (M&A), but what have you done to maximize your current processes in preparation?

Firms often look to technology tools first when trying to improve their process. However, leading firms have found more success when they pair Lean Six Sigma principles with their processes and technology. A Lean Six Sigma project involves a few simple steps, but that doesn’t mean they are easy.

5 steps to a Lean Six Sigma M&A Project

- **ASSEMBLE**
- **DEFINE**
- **MAP**
- **DOCUMENT**
- **COMMUNICATE & TRAIN**

Focus on the customer.

Identify and understand how the work gets done (the value stream).

Manage by fact and reduce variation.

Remove Non-Value-Added steps and waste.

Manage, improve and smooth the process flow.

Even if your firm hasn’t embarked on a Lean Six Sigma project in the past, you can reap the benefits by assembling a multi-disciplined, cross-functional team immediately following the merger. The Lean Six Sigma process follows these five steps.

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Connecting Your People and Process through Technology

Once you’ve performed the proper analysis to streamline and improve your processes, technology can act as the accelerator to achieving maximum benefit. A comprehensive workflow tool will fast-track the firm toward a consistent, one-firm process that takes full advantage of automation, visibility, and compliance. It will automate and/or eliminate many of the tedious, manual tasks we perform on a daily basis. It also creates transparency across the firm and provides greater insight into the overall management of the business.

With a workflow technology like XCM, you will be able to connect your people and new, streamlined processes with technology. To learn how XCM’s workflow automation software can help your firm move towards standardized and efficient processes, contact us at 781.356.5152 or visit xcmsolutions.com today.

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