



CASE STUDY

MERGERS + ACQUISITIONS

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How do you merge two ASX 100 organisations with 12,000 staff?

01

THE CHALLENGE

Two of Australia's largest wealth management companies were merging. They needed to integrate their systems, processes, and organisational structure for the two businesses, and bring 12,000 staff across Australia, New Zealand, Singapore and India into one unified business.

02

THE SOLUTION

- We developed and implemented a Change Management strategy and mapped target business processes and productivity metrics.
- We mapped the supporting Organisational Design and implementation required to create one organisation from the two.
- We designed the Target Operating Model with timelines and change management approach, and completed the exit of around 450 surplus staff.
- We implemented centralised support service functions for IT support, Procurement, HR and Finance.
- We designed and implemented a training and communication program to support all layers of the combined businesses.
- We engaged all levels of IT management, business managers and technical experts, including new and existing vendors, to manage concerns, people risks, and issues.

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THE RESULT

As a result of our change strategy and implementation approach our client achieved:

- 25% reduction in IT costs across the merged business
- Reduction in staff numbers of around 450
- Five data centres were merged into two, with no business outages
- 3,000 users across Australia and New Zealand were successfully migrated to a single outsourced support centre in one day.
- Even though 250 applications and 12,000 staff were impacted by this merger, we achieved 99.9% business continuity.