



Intro to Quantitative Integration Analysis (QIA)

May 9, 2024



EFCG Quantitative Integration Analysis (QIA)

Understand post-merger integration as never before



Leverage millions of pre-existing data points to view your organization at any level of detail



Act on leading indicators of integration success – months ahead of conventional approaches



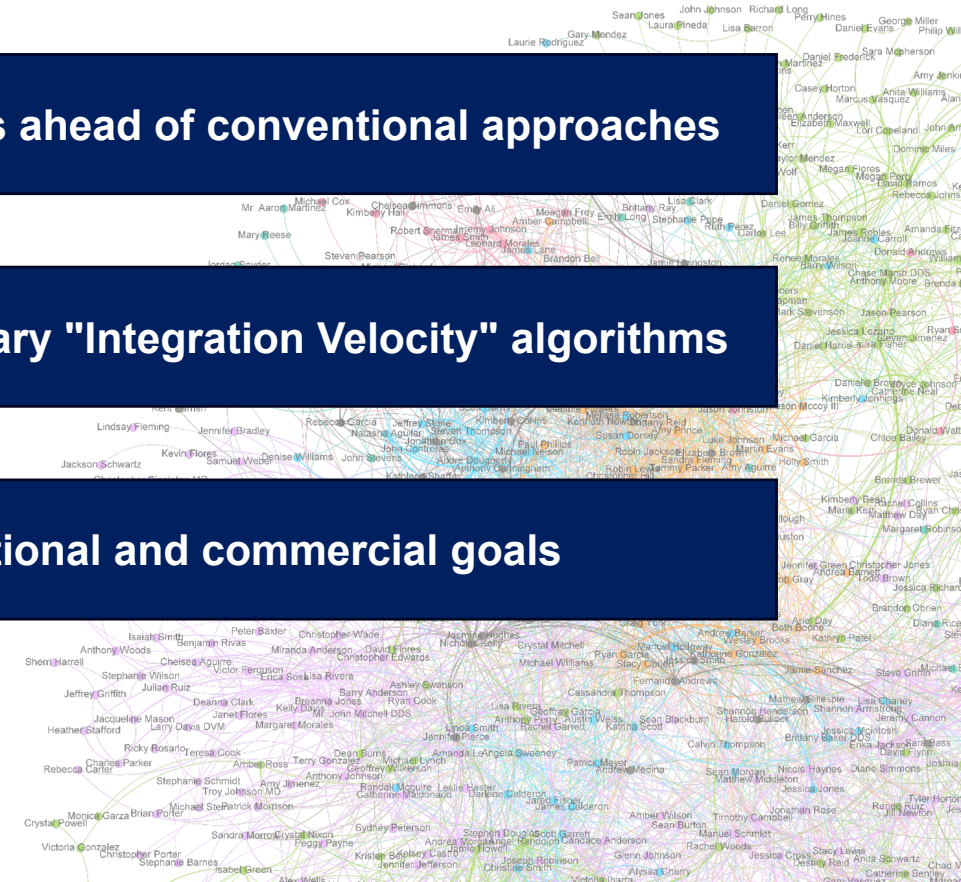
Measure and benchmark progress using EFCG's proprietary "Integration Velocity" algorithms



Prove value creation and track progression toward operational and commercial goals

Contact

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QIA Data Flow Overview



Core Data Inputs

HRIS Data
List of employees.

Email Metadata
Email "trace" metadata.

ERP Data
*Lists of clients and projects.
Timesheet metadata.*

Formal Network

- Connections from formal reporting relationships.
- Built from HRIS data.
- Shows the "full" org chart.

- Example Analyses**
- How has our organization's structure changed as we've grown?
 - Where are managers structurally challenged to form effective and productive teams?
 - How do different acquisitions' org structures differ?

Network of Communications

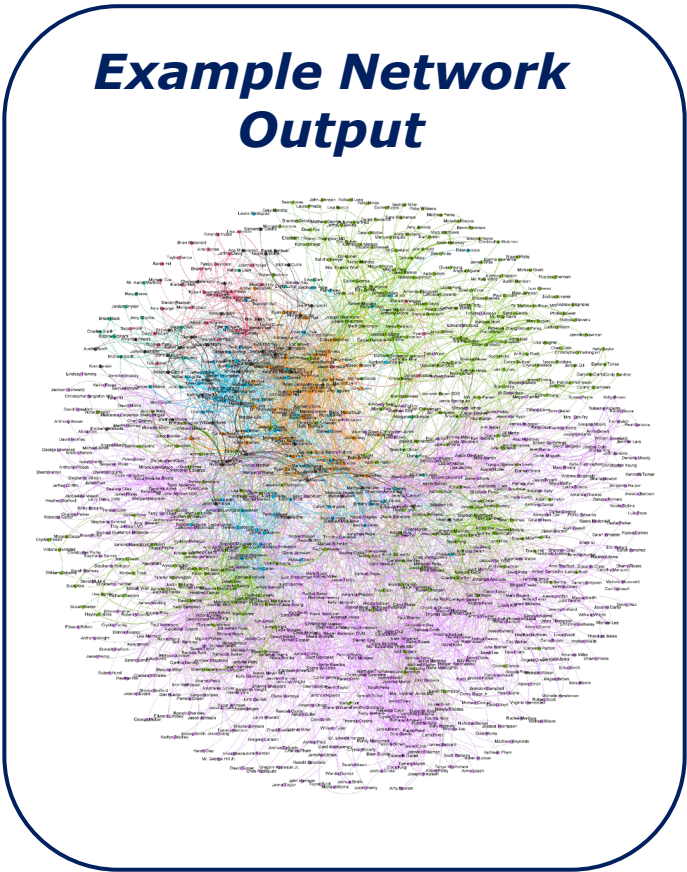
- Connections from email.
- Built from email trace metadata.
- Shows both internal and client relationships.

- Example Analyses**
- How much are our acquisitions talking to each other?
 - Who "owns" our key client relationships? How are these relationships managed?
 - How effectively do we "cross-manage" relationships?

Network of Work

- Connections from project work.
- Built from timesheet data.
- Shows who works with whom at the project and client level.

- Example Analyses**
- How much are our acquisitions collaborating on project work?
 - Where in our organization is work happening for our most important clients?
 - How effectively do we cross-sell?



Sample QIA Executive Dashboard

Use email metadata and timesheets to measure **leading indicators** of your integration.

Integration Dashboard

Formal Network

Formal Network Version

Formal Network (2023-09-30)

1,089

Employees

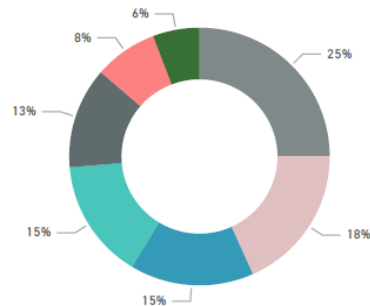
5.1

Avg. Span of Control

7.9

Avg. Shortest Path

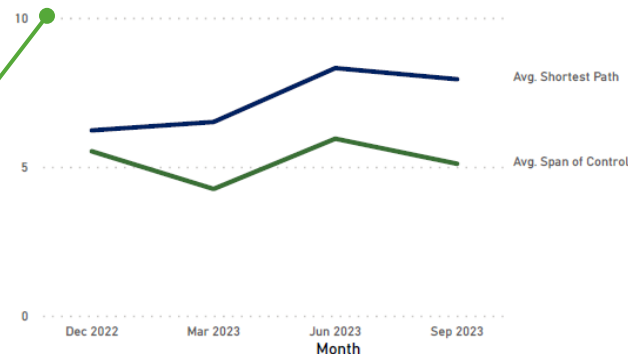
Employees by Legacy Group



Legacy Group

- AcquiredCo 2
- Division A
- Division B
- Division C
- AcquiredCo 1
- Division D
- Corporate

Avg. Span of Control and Avg. Shortest Path Over Time



Track key metrics to ensure **org structure balance** as your firm grows.

Network of Communication

Network of Communication Version

Network of Communication (2023_09Sep)

30.9%

Overall Integration Index

8.5

Avg. # Connections

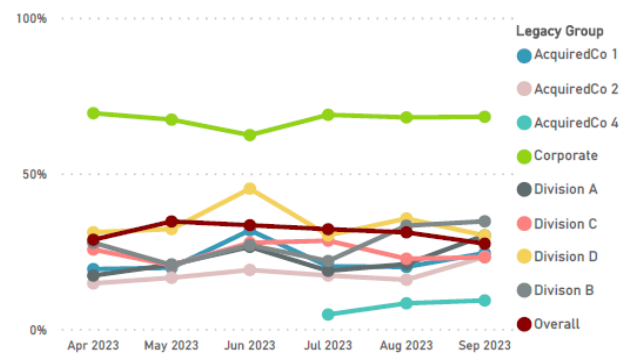
2.7

Avg. # "Cross" Connections

Pairwise Integration Index by Legacy Group

	AcqCo 2	AcqCo 3	AcqCo 4	Corp.	Div A	Div B	Div C	Div D
AcquiredCo 1	14.5%	4.0%		32.3%	6.9%	11.1%	12.9%	10.3%
AcquiredCo 2		6.6%		33.0%	17.8%	16.3%	12.0%	14.2%
AcquiredCo 3						9.6%	3.8%	8.5%
AcquiredCo 4								
Corporate		23.7%			32.2%	48.4%	28.6%	23.7%
Division A		5.8%				21.1%	15.1%	17.2%
Division B							5.7%	12.8%
Division C								22.0%

One.-vs.-All Integration Index by Month and Legacy Group



Network of Work

Network of Work Version

Network of Work (2023_09Sep)

4.1%

Overall Integration Index

6.1

Avg. # Connections

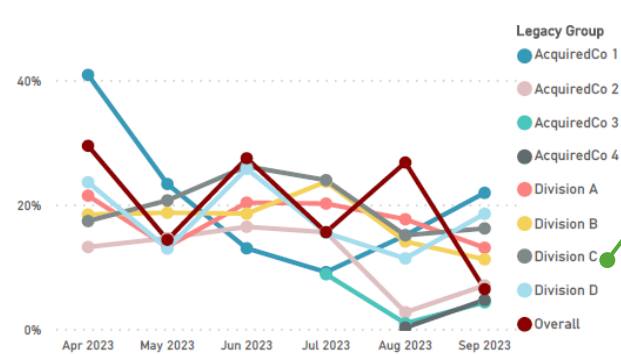
1.1

Avg. # "Cross" Connections

Pairwise Integration Index by Legacy Group

	AcqCo 2	AcqCo 3	AcqCo 4	Div A	Div B	Div C	Div D
AcquiredCo 1	9.6%	11.7%	13.4%	14.5%	10.3%	8.0%	8.9%
AcquiredCo 2		11.3%	3.0%	1.8%	8.5%	8.4%	2.9%
AcquiredCo 3					0.5%	10.9%	1.6%
AcquiredCo 4		8.3%		8.9%	11.6%	0.9%	14.3%
Division A		0.7%			13.2%	5.1%	11.3%
Division B						4.2%	0.3%
Division C							15.1%

One.-vs.-All Integration Index by Month and Legacy Group

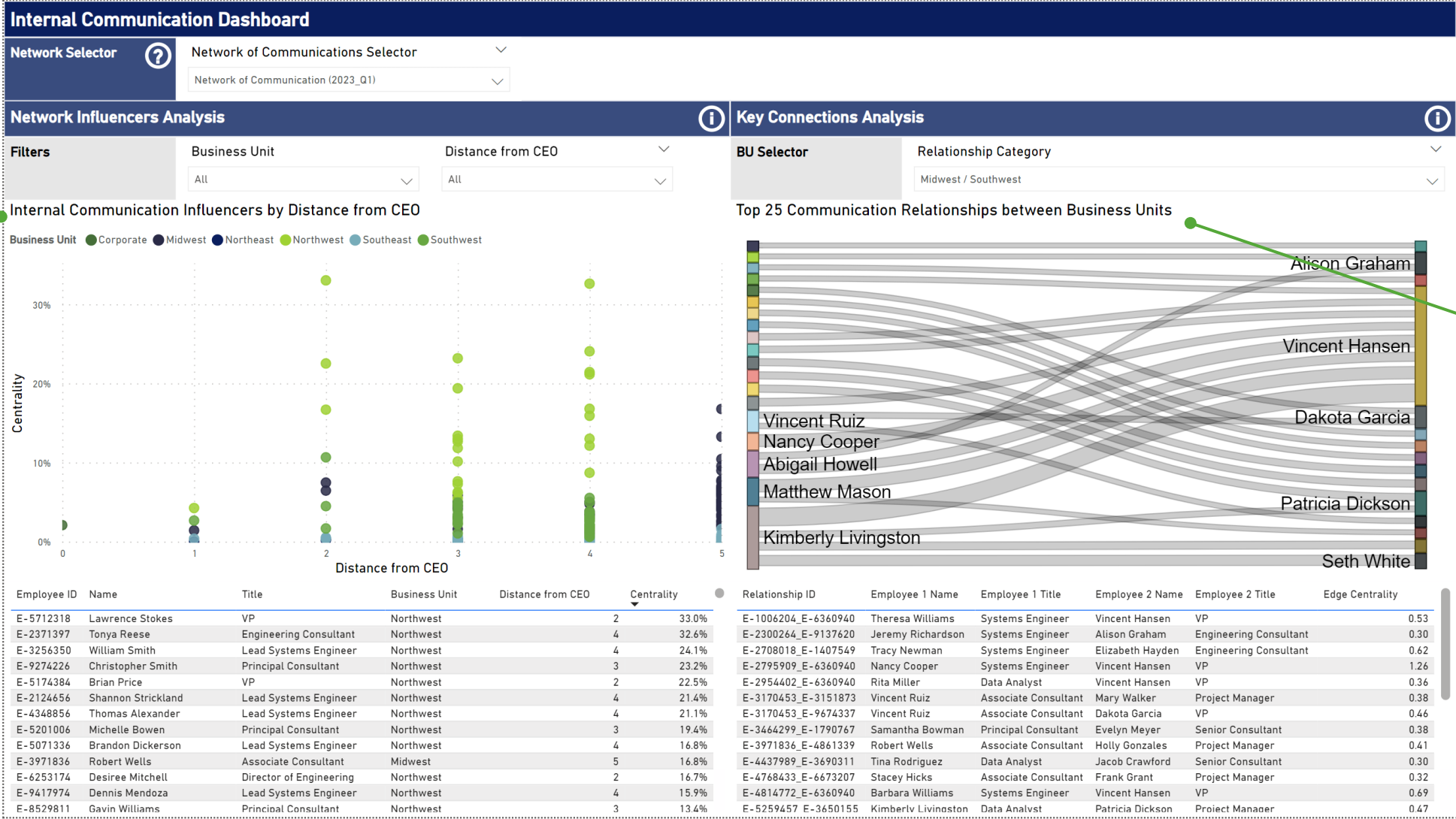


Quantify your progress in a single number: EFCG's "Integration Index".

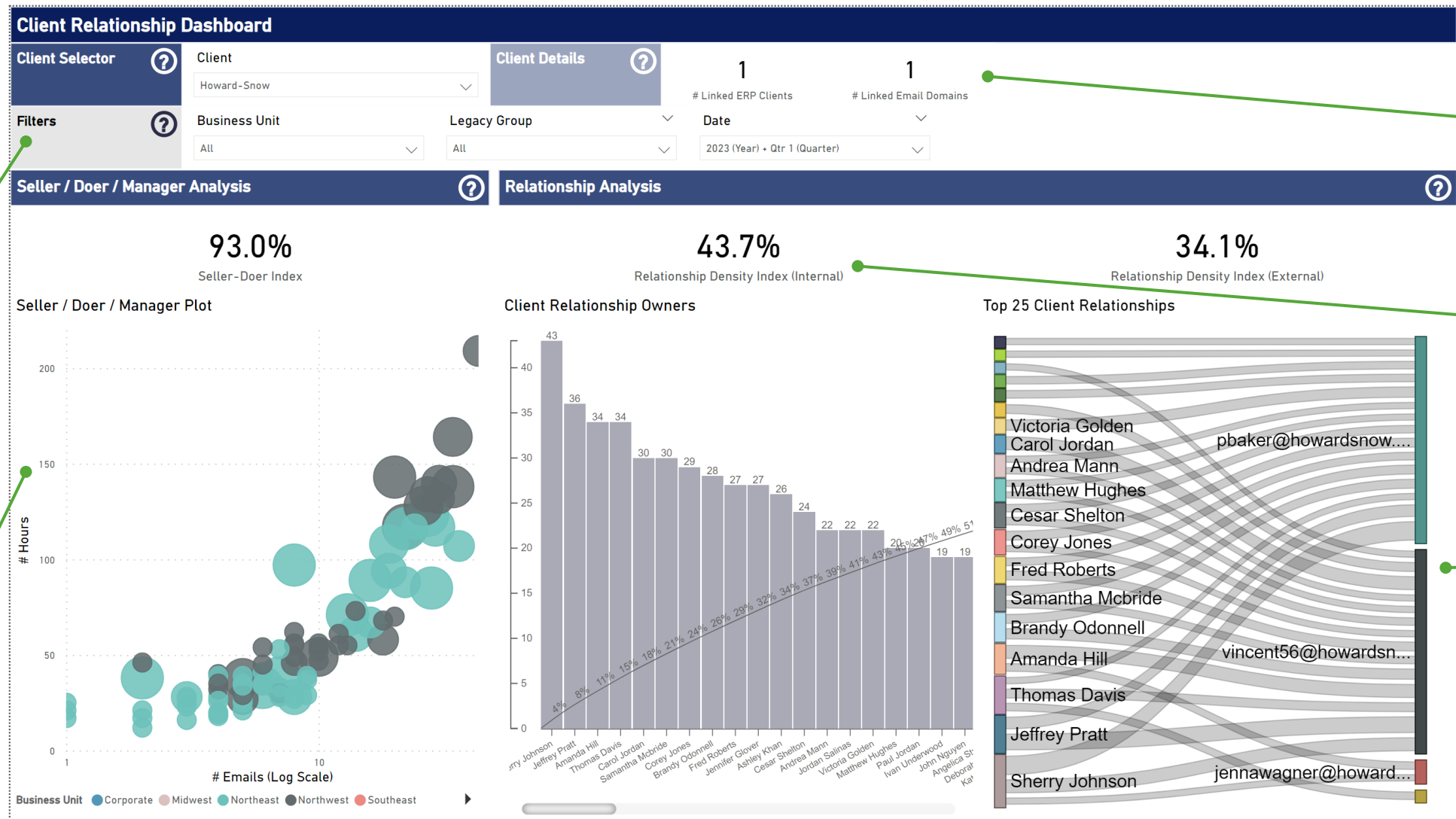
Understand exactly **where people are connecting** in your organization – and where more focus is needed.

Track your "Integration Velocity" over time and benchmark against other acquisitions.

Sample Internal Communications Dashboard



Sample Client Relationship Dashboard



Examine client relationships at any level of detail.

Explore client relationships by unifying ERP and email metadata.

Consolidate client metrics across ERP systems into a single view.


Quantify relationships with simple metrics to easily understand and compare clients.

Visualize communication and understand key relationship levels.

Appendix

Offering Details



Deliverable	Details	Cadence	Pricing
QIA Dashboard	<ul style="list-style-type: none">PowerBI dashboard presenting key QIA metrics.Deliverable via Microsoft Teams or as standalone file.	Monthly / quarterly	Monthly Dashboard \$7.5k/month <i>(\$90k total for 12 months)</i> or Quarterly Dashboard \$15k/quarter <i>(\$60k total for 12 months)</i>
Quarterly Executive Briefing	<ul style="list-style-type: none">Readout of key metrics by EFCG.Targeted analysis of areas of interest.Strategic questions and recommendations.Custom network visualizations.	Quarterly	
<div> Custom Consulting Analyses</div>	<ul style="list-style-type: none">Additional analyses to be defined as needed.Results integrated into PowerBI deliverable.<i>Example Analyses:</i> Innovation network, market sector analysis, client relationship deep-dive.		

Security and Confidentiality



- Email tracing/export can be executed at client or by EFCG with Global Reader privileges (read only) (Powershell Scripts on Exchange Online)
- EFCG uses secure file transfer for receiving export files (services provided by client or EFCG as needed)
- Storage of data is on air-gapped FIPS 140-2 Level 3 Certified storage (encrypted at rest and timed lockout)
- Cloud Storage is Google Cloud Storage and Google Big Query (only 3 people have access, least privileges)
 - ISO compliant and security audit available to clients