

M&A · 17

PMI Structure & Reporting

Commercial integration value is captured in a fixed order, with the brand decided last.

THE QUESTION IT
ANSWERS

Are the commercial synergies we underwrote landing, and can the board see it every month?

THE METHOD

Integration order

First

Positioning & messaging

One value proposition across products, personas and segments.

Second

Programmes

Stop inefficient channels, reallocate, scale what converts.

Third

Team

Shared centres of expertise instead of one team per product.

Fourth

Budget

Unified programmes, headcount and tech stack.

Last

Brand

Only once the other four are captured.

WHAT WE DO

Set one system of record for marketing and sales

Consolidate overlapping roles, campaigns and tools

Run a monthly commercial scorecard on the nine foundations

Track each synergy line from model to realised

WHAT YOU RECEIVE

Commercial integration roadmap

Unified go-to-market organisation design

Synergy tracker linked to the deal model

Monthly board scorecard

METRICS MOVED → ENTERPRISE VALUE

Revenue synergies: cross-sell and combined pipeline

Cost synergies: S&M spend as a share of revenue

Efficiency: CAC and payback across the combined portfolio

TYPICAL TIMELINE

6–12 months, as a monthly operating rhythm

PROOF

Trackunit: post-merger integration of ZTR supported while advising on brand and go-to-market, 2016–2022.

Let's talk about your commercial foundation.

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