

# Case Study

## MERGER INTEGRATION AND REPORTING PROCESS IMPROVEMENT - ENERGY SERVICES

SECTOR: BUSINESS SERVICES

KPI Reporting Process Development

Visibility

Streamlined Board Reporting Tools

### The Requirement – CFO of a High Growth Business Services Company Needed Visibility into Key Financial and Operational Drivers

A leading North American energy efficiency services company (\$160mm revenue) had recently been acquired by a \$17bn global growth equity firm. The company had achieved extraordinary growth, both organically and through acquisitions, and operated through regionally-focused business units. To better manage growth and to drive continued performance and strategic priorities, the company’s CFO and private equity sponsor identified a need to define and track a set of key performance metrics across disparate business units.

### The Execution – Rapid implementation of KPI Reporting Process and Platform

Accordion developed an integrated platform of metrics to drive management priorities, pricing and profitability decisions, resource allocation and top-line growth:

- During the initial discovery phase, Accordion worked with company management to quickly gain a detailed understanding of the strategic priorities and key management decisions, including optimal contract pricing and client segmentation
- Accordion then defined a set of financial and operational metrics such as kwh-savings, EBITDA/Hour and Probability Weighted Pipelines. These metrics enabled management to measure progress and contribution from Business Units down to the individual client and program levels
- Accordion also analyzed the company’s existing data systems and reporting capabilities to determine data availability and identified and revised data collection processes to enhance data segmentation and business intelligence
- Critically, Accordion constructed and implemented a comprehensive KPI metrics reporting platform with automated processes for data inputs and report generation, providing the ability to interactively drill down and link financial and operational drivers to company performance
- Accordion also created various custom reports such as Pipeline Go-Get and Revenue Bridges that enhanced the company’s existing monthly financial reporting package and highlighted key actionable data points to management and investors
- Accordion conducted teach-ins with the company’s staff and efficiently transitioned the reporting platform. Accordion also developed a step-by-step usage guide and a detailed update roadmap to set the cadence for updates

### The Resolution – A Robust Reporting Tool to Drive Actionable Analysis

- The company management and private equity sponsor derived significant time and cost benefits from the detailed metrics reports by analyzing the company’s operations at such a granular level and connecting detailed operational data to financial performance.
- A variety of actionable insights were also identified, including the need to standardize pricing and costing, gap analysis of top-line growth and labor pay standardization across business units.

**Team Size:** 1 Director, 1 Vice President

**Project Duration:** 8 weeks

