

# Merger & Acquisition Expertise



## What We Offer:

*Fully outsourced M&A and integration project activities*  
*Staff Augmentation to supplement internal resources*  
*Creation and deployment of a conversion playbook*

You have a lot of pieces to pull together as your financial institution faces a merger or acquisition. EDGE Services understands what you are up against and how everything needs to fit together for a smooth, successful transition.

EDGE Services works exclusively with banks, credit unions and finance companies, with integration needs due to mergers and acquisitions.

We fill a unique niche in the industry because our banking consultants have done numerous mergers and acquisitions, in hundreds of different scenarios. They have worked on mergers across the country and bring experience in identifying and deploying the most effective practices.

## Benefits of using **EDGE**:

- Expert resources experienced in banking M&A, including PM's, SME's, BA's, PA's and QA's
- Reduction of time and costs through deployment of a concise conversion playbook
- Dedicated full-time project management
- Staffing model that aligns resource deployment with merger timeline Elimination or reduction of customer impact
- Identification and guidance on maximizing internal resource efficiencies
- Experience with incorporating new feature functionality requirements Management and coordination of merger activity involving third party vendors across the organization

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# **EDGE Work in Mergers & Acquisitions:**

## **Conversion Playbook**

To be an effective acquirer in today's market, it is imperative that cost savings be realized as quickly as possible. Our client needed to streamline the M&A conversion process and reduce the time from start to completion.

EDGE was engaged to analyze the existing M&A conversion process, make recommendations to shorten the timeline, and document the new process. Our team of analysts worked closely with senior M&A management and, over an eight-week period, developed a 90-day conversion outline and the contents of integration playbooks. EDGE developed and customized 10 playbooks for: DDA, TDA, Retirement Reporting, CIS, Consumer Loans, Commercial Loans, ATM/Debit Cards, Item Processing, Bill Pay and Automated Transfers.

The result is a documented 90-day conversion path, structured for either internal or external resources, which positions the bank for growth via acquisition.

## **Mid-Size Bank**

Client bank was in acquisition mode and needed a team of experienced M&A resources to meet a 16-week conversion timeline. EDGE handled multiple M&As over a period of several years, seamlessly integrating customer data into the acquiring banks systems.

Applications converted included: CIF, DDA, Savings, Time Deposits, Retirement Accounts, Consumer Loans, Commercial Loans, Safe Box Accounting, General Ledger, Marketing Mailings, ATM & Debit Card.

EDGE had complete responsibility for delivering the converted systems on a fixed-price basis. Our project managers, business analysts, technicians and quality assurance personnel completed all aspects of the conversion, including: project kick-off, data mapping, conversion coding and unit testing, systems integration testing, mock conversions, user acceptance testing and post-conversion support. Resources were deployed within two weeks of approval notification.

*"I have worked with EDGE for over 10 years now and utilized EDGE resources in the roles of business analyst, developer, project manager and quality assurance technician. Whenever anyone in my department had a job that needed to get done and did not have the internal resources to do it, I would say to them 'Call EDGE. They have the resources, they understand our environment, and they deliver.' EDGE has experienced resources with the software expertise required and they are professionals who understand how to listen, develop solutions, and complete them as cost effectively as possible. "*

**- Client PMO**

## **Large Bank**

The client bank has grown more than 500% in the last eight years. EDGE has played a key role in their M&A strategy, providing specialized banking application talent to convert acquired bank's customer data. Depending upon the size and complexity of the acquired bank, EDGE has provided from 10 to 35 project managers, business analysts and quality assurance testers. EDGE resources supported the M&A process, allowing the client to continue other mission critical initiatives without interruption. EDGE provided the necessary flexibility in having the right talent at the right time for numerous acquisitions.

*"I have worked with EDGE over the past 7 years, specifically on acquisition and integration projects. As I have assembled several teams of project managers, business and technology analysts, EDGE has consistently provided high quality, top notch resources. EDGE has taken the extra time and effort, working with our company to understand the environment and team dynamics, as well as the work that needs to be accomplished. Their consistent approach to high quality, professional and very talented resources is one of their largest contributions to our company. I know I can call them at a moments notice with a request and they will have someone working on my request immediately. The professionalism of their team and talent continues to impress me every day!"*

**- Client PMO**