

# Best Practice Dashboards and Reports for M&A and Corporate Development

View our full listing of 100+ dashboards and reports to learn about automated M&A reporting with Midaxo

# Why Automated Reporting?

**Data is behind most M&A decisions. Visibility into the right metrics and data can be crucial throughout M&A—for corporate development, due diligence, integration, corporate venture capital and divestments.** Working collaboratively and in real-time allows the most relevant and up-to-date information to be accessed anytime and greatly supports data-driven decision making – when time is of the essence.

Under old ways of working, however, it's been difficult to understand the full picture across the M&A deal lifecycle owing to disparate data sources and manual reporting processes. Midaxo Analytics enable you to ask – and answer – intelligent questions and for the data to tell the story. Advanced real-time dashboards and one-click reports empower teams to spend less time reporting and more time working on the things that matter most.



**Ad-Hoc Report  
Templates Created**



**Data Collection  
with Multiple Docs**



**Hours of Tedious  
Compilation**



**Reports are Already  
Out-of-Date**

With Midaxo's collaborative end-to-end platform for M&A, you can have all of this information in one place – every target, task, communication, document, status, notes – and automated reporting. Refresh your dashboard for the most up-to-date information in the system or click a button to produce a multiple-page report, that matches your existing report templates and branding standards, all without the weekly administrative burden of manual report compilation.

## Key Benefits

- **Work with Speed** – insights from data are most useful when accessible in real-time. Midaxo Analytics allows teams to work intuitively with the latest data and prevents siloed working and bottlenecks slowing down deal progress.
- **Save Time with Process Automation** – select from a comprehensive range of best practice dashboards and reports, create your own or work with Midaxo on a custom build and move your reporting from an inefficient process that takes hours to a streamlined workflow taking just a matter of seconds – with one click.
- **Make Data-driven Decisions** – there should be no guess work in the M&A decision making process. Access to the most up-to-date data and insights can have a significant impact on decisions made in the moment, or those made later on in the deal lifecycle and even on other deals.
- **Execute with Confidence** – access to the right data can assure decision makers, raise the level of confidence on a deal and heighten the awareness of risk factors.

To provide you with a more valuable starting point, we worked with M&A experts to put together a collection of best practice dashboards and reports. This document reviews our most popular ones. The dashboards and reports with stars are included with the Midaxo platform.

**See Midaxo's full collection of best practices dashboards and reports.**

*Contact us to learn more*



# Corporate Development & Deal Origination

Monitor the status of your M&A pipeline and deal origination activities at a glance. Real-time dashboards with drill-down functionality and one-click reports sync to your latest information – ensuring you are always making data-driven decisions. Midaxo's best practice analytics framework for corporate development and deal origination enables you to visualize where targets are in the deal pipeline, understand the reason for target rejection, generate target overviews with one-click, track custom KPIs and focus on the best fit deals with target scoring.



M&A Pipeline

# Corporate Development & Deal Origination

## Featured Report Target Overview\*

## Deal Flow Management

### Additional Dashboards and Reports Available

- Dashboards:
  - Active Targets\*
  - Project Management\*
  - My Tasks\*
- Reports:
  - Active Targets\*
  - Active Projects per Deal Lead, per Stage\*
  - Deal Flow Management
- Dashboard + Drill-Down Report
  - New Targets - Last 30 Day
  - Reason for Target Rejection



### Pipeline Overview

15-Feb-19

|               |                    |               |           |                |               |                |            |              |
|---------------|--------------------|---------------|-----------|----------------|---------------|----------------|------------|--------------|
| TechPut       | Transport          | Cologne       | 800       | 35             | 280           | 3              | 1608       |              |
| TechShare     | Telecomms          | Geneva        | 500       | 75             | 1200          | 2              | 510        |              |
| Wallet        | Financial Services | San Francisco | 780       | 50             | 550           | 1              | 3156       |              |
| <b>Totals</b> | <b>24</b>          | <b>7</b>      | <b>15</b> | <b>€10,609</b> | <b>€1,044</b> | <b>€12,990</b> | <b>1.7</b> | <b>57852</b> |

#### Closed

| Deal Overview | Category  | Location      | Revenue (M) | EBIT (M)      | Valuation (M) | EV/Revenue    | Employees  | Deal Status |
|---------------|-----------|---------------|-------------|---------------|---------------|---------------|------------|-------------|
| Cabify        | Transport | Delhi         | 1000        | 75            | 750           | 1             | 600        |             |
| SpaceWire     | Aerospace | San Francisco | 200         | 10            | 250           | 10            | 50         |             |
| AltoCorp      | Aerospace | Paris         | 25          | 10            | 100           | 4             | 100        |             |
| <b>Totals</b> | <b>3</b>  | <b>2</b>      | <b>3</b>    | <b>€1,225</b> | <b>€95</b>    | <b>€1,100</b> | <b>5.1</b> | <b>790</b>  |

#### Pipeline Totals

| Stage             | Active Deals | Revenue (M)    | EBIT (M)      | Valuation (M)  | EV/Revenue |
|-------------------|--------------|----------------|---------------|----------------|------------|
| Prospect          | 13           | \$5,045        | \$510         | \$7,250        | 1.4        |
| Initial Analysis  | 5            | \$2,974        | \$222         | \$2,340        | 0.8        |
| Light Diligence   | 3            | \$1,900        | \$215         | \$1,850        | 1.0        |
| Full Diligence    | 2            | \$675          | \$95          | \$400          | 1.9        |
| Signing & Closing | 2            | \$215          | \$12          | \$850          | 0.8        |
| Integration       | 2            | \$1,025        | \$85          | \$14,090       | 2.1        |
| <b>Totals</b>     | <b>27</b>    | <b>€11,834</b> | <b>€1,139</b> | <b>€14,090</b> | <b>2.1</b> |

\* included in standard pricing of Midaxo platform

**Midaxo**

# Due Diligence

Monitor progress across multiple due diligence projects at a glance. Real-time dashboards with drill-down functionality and one-click reports sync to your latest information – showing progress on documents and tasks by workflow, individual users and status of completion. Midaxo's Analytics workflow for due diligence enables teams to report in seconds and keep all key decision makers and stakeholder up-to-date

## M&A Pipeline

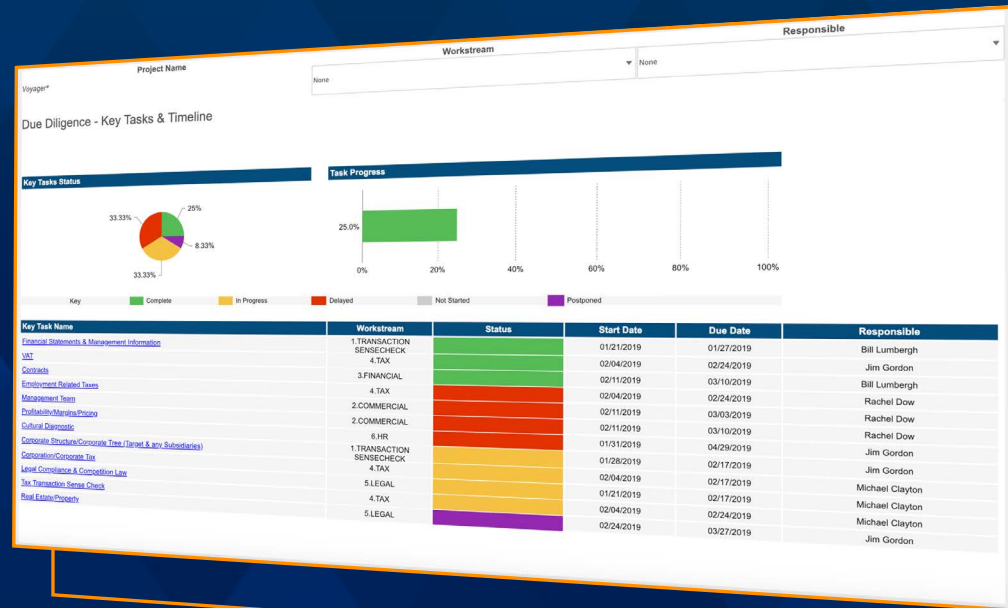


# Due Diligence

## Featured Report Key Tasks & Timeline\*

### Additional Dashboards and Reports Available

- Task Progress\*
- Task Status
- Key Documents Status Dashboard and Drill Down Report:
- Task Progress Key Documents Status



\* included in standard pricing of Midaxo platform



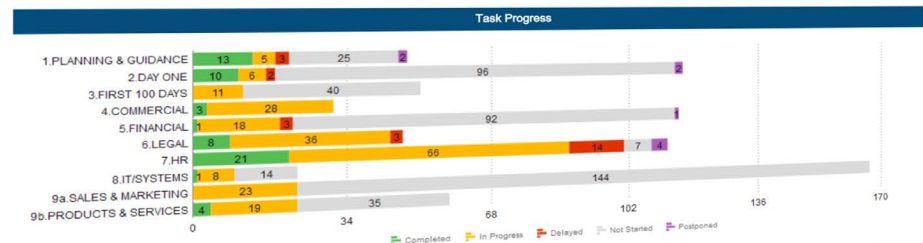
# Integration

Monitor progress across multiple integration projects at a glance. Real-time dashboards with drill-down functionality and one-click reports sync to your latest information – showing progress on documents and tasks by workstream, individual users and status of completion. Midaxo's Analytics workflow for integration enables teams to report in seconds and keep all key decision makers and stakeholders up-to-date.

## Integration Binder

### Executive Summary - Task Progress

| Workstream Name        | % Complete  | Total Tasks | Completed | Delayed   | In Progress | Not Started | Postponed |
|------------------------|-------------|-------------|-----------|-----------|-------------|-------------|-----------|
| 1.PLANNING & GUIDANCE  | 27.1%       | 48          | 13        | 3         | 5           | 25          | 2         |
| 2.DAY ONE              | 8.6%        | 116         | 10        | 2         | 6           | 96          | 2         |
| 3.FIRST 100 DAYS       | 0.0%        | 51          | 0         | 0         | 11          | 40          | 0         |
| 4.COMMERCIAL           | 9.7%        | 31          | 3         | 0         | 28          | 0           | 0         |
| 5.FINANCIAL            | 0.9%        | 115         | 1         | 3         | 18          | 92          | 1         |
| 6.LEGAL                | 17.0%       | 47          | 8         | 3         | 36          | 0           | 0         |
| 7.HR                   | 18.8%       | 112         | 21        | 14        | 66          | 7           | 4         |
| 8.IT/SYSTEMS           | 4.3%        | 23          | 1         | 0         | 8           | 14          | 0         |
| 9a.SALES & MARKETING   | 0.0%        | 167         | 0         | 0         | 23          | 144         | 0         |
| 9b.PRODUCTS & SERVICES | 6.9%        | 58          | 4         | 0         | 19          | 35          | 0         |
| <b>Totals</b>          | <b>7.9%</b> | <b>768</b>  | <b>61</b> | <b>25</b> | <b>220</b>  | <b>453</b>  | <b>9</b>  |





# Integration

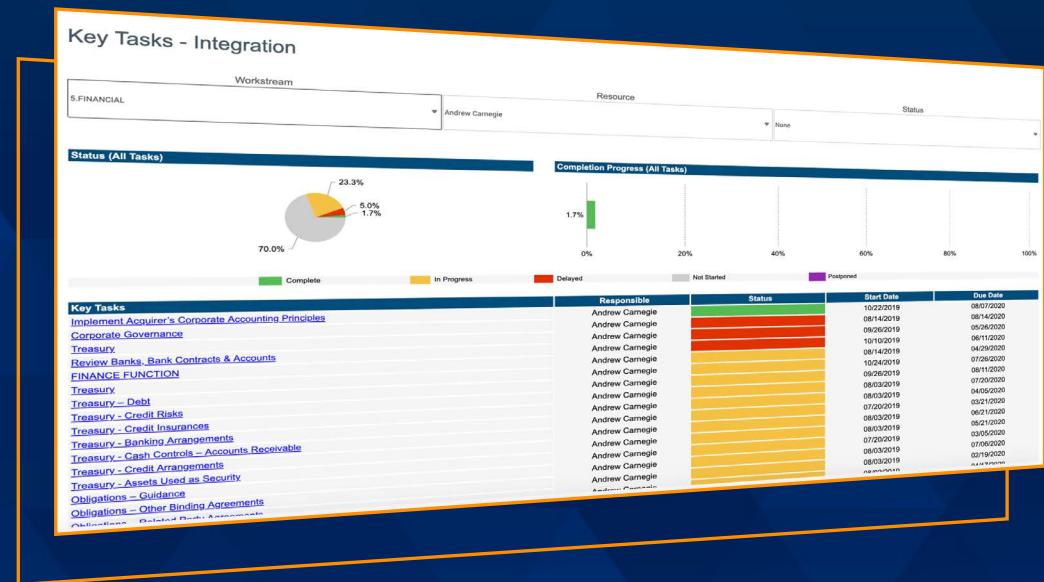
## Featured Report Key Tasks & Timeline\*

### Additional Dashboards and Reports Available

Dashboards:

- Task Progress\*
- Progress Review

Dashboard and Drill Down Report:  
Progress Review



\* included in standard pricing of Midaxo platform

# Corporate Venture Capital

Actively manage your venture portfolio companies via configurable Analytics workflows across deal origination, due diligence, investment, holding and exit using real-time dashboards with drill-down functionality and one-click reports. Track and analyze your investment data, understand performance and KPIs, report out to stakeholders with ease, stay up to date on the latest progress of portfolio companies and ensure you're making informed investment decisions – all in one platform.

## Portfolio Analysis



# Corporate Venture Capital

## Featured Report Ventures Pipeline

### Additional Advanced Dashboards and Reports Available

- Ventures Pipeline [Dashboard, Drill-down Report Ex #1]
- Ventures Pipeline [Dashboard, Drill-down Report Ex #2]
- Investment Analysis [Dashboard]
- ROI Analysis [Dashboard]
- Cash Returns [Dashboard]
- Outreach - Active Targets [Dashboard]
- Portfolio Company - Key Financials [Dashboard]
- Active Targets [Dashboard]
- Portfolio Investments [Dashboard]
- Active Targets [One-click Report]
- Portfolio Investments [One-click Report]
- Exited Investments [Dashboard]
- Exited Investments [One-click Report]
- Transaction Register [One-click Report]



# Divestment for Advisors

## Divestment Management Office (DMO)

### Additional Advanced Dashboards and Reports Available

- Divestment Management Office (DMO) [Dashboard, Drill-down Ex #1]
- Divestment Management Office (DMO)[Dashboard, Drill-down Ex #2]
- Active Buyers [Dashboard]
- Dropped Out Buyers [Dashboard]
- Task Progress [Dashboard]
- Task Progress [Dashboard, Drill-down Example]
- Document Status [Dashboard]
- Document Status [Dashboard, Drill-down Example]
- Active Buyers [One-click Report]
- Reason for Drop Out [One-click Report]
- Task Status [One-click Report]
- Document Status [One-click Report]

Use Midaxo as your digital Divestment Management Office (DMO). Actively manage divestment projects for clients using real-time dashboards with drill-down functionality and one-click reports. Track and analyze potential buyers, KPIs such as outreach by team members, key documents such as NDAs & CIMs and understand the reason for buyers dropping out of the bidding process. Report out to clients with ease and stay up to date on the latest progress across multiple divestment projects.

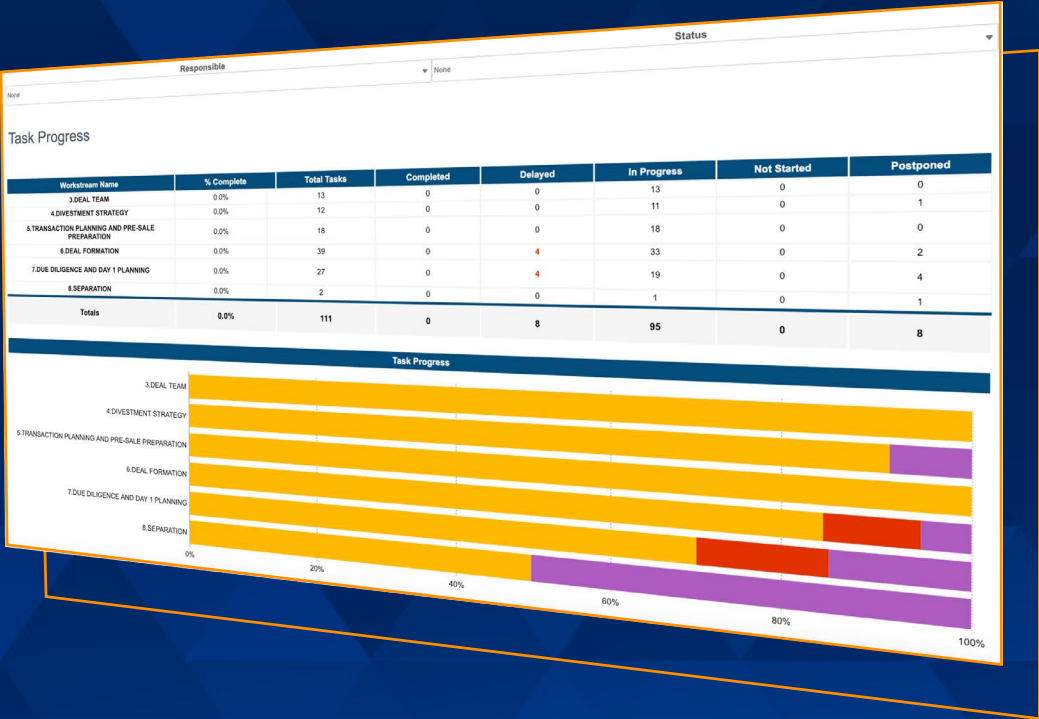




# Divestment for Corporates

Use Midaxo as your digital Divestment Management Office (DMO). Actively manage a portfolio of business units being considered for - and subject to - divestment, using real-time dashboards with drill-down functionality and one-click reports. Track and analyze business units as part of a strategic review, monitor documents such as NDAs & CIMs and access details of the latest interactions with potential buyers with one click. Report to key decision makers/stakeholders with ease and stay up to date on the latest progress across multiple divestment projects.

## Task Progress



# Divestment for Corporates

## Featured Report Document Status

### Additional Advanced Dashboards and Reports Available

- Key Tasks [Dashboard]
- Task Status [One-click Report]
- Document Status [One-click Report]
- Project Overview One-pager [One-click Report]



# Success Stories

## Fortune 100 Global Electronics Manufacturer

Midaxo worked with a global electronics manufacturer to redesign and build their entire reporting process across buy and sell-side M&A, corporate venture capital, partnerships, alliances and joint ventures. Midaxo's Analytics capabilities empowered senior decision makers to make in-the-moment decisions with confidence and provided deep insight into the entire deal lifecycle via real-time dashboards and one-click reports. This enabled teams to gain deeper visibility into acquisition targets, the status of due diligence and integration projects and KPIs relating to venture portfolio companies. With Midaxo Analytics, reporting moved from a manual, reactive processes taking many hours per week to a proactive process taking just a matter of minutes, while at the same time connecting teams spread across the world.

## Privately owned European Component Manufacturer

Midaxo worked with a European component manufacturer to redesign and build their entire reporting process across deal origination, due diligence and integration. Midaxo's Analytics capabilities provided teams working in multiple business units with the ability to call-up real-time dashboards and one-click reports covering the entire M&A deal lifecycle – therefore enabling decisions to be made with confidence and saving many reporting hours per week.

## Global Professional Services Firm

Midaxo worked with a leading global professional services firm to design and build multiple reporting processes for due diligence and post-merger integration across real-time dashboards and one-click reports. Midaxo's Analytics are being used across numerous client engagements and allows both advisory team members and their clients to stay informed on time sensitive, mission critical projects.