

# Midaxo Value Tracker

Monitoring and Learning from Acquisition  
Outcomes

JUNE 2023

M&A teams develop a deal thesis that details the expected benefits of each acquisition. However, monitoring the realized benefits over months and years and learning from those outcomes can be a difficult challenge using Excel spreadsheets. Midaxo Value Tracker can greatly simplify the process and provide a single, integrated source of truth for tracking synergies realized from an acquisition.

## Midaxo Value Tracker

The **Midaxo platform** offers solutions for all stages of the M&A process, from deal origination through post-merger integration. Midaxo Value Tracker further enhances your M&A activities by capturing your projections of expected deal outcomes, tying expected outcomes to integration tasks, and monitoring performance versus goals as the acquisition is integrated and synergies are fully realized.

The Value Tracker is highly customizable so your team can:

- Define initiatives and sub-initiatives to be tracked
- Connect initiatives with specific post-merger integration tasks
- Establish metrics for each initiative
- Specify KPIs for each metric
- Define up to a 5 year reporting period with monthly increments

The system features an easy-to-use charting capability for graphical representation of the tracking data with pre-defined best practice reports. There is also an import/export capability for Excel to simplify downloads for offline analysis or data uploads.

After defining your major initiatives and sub-initiatives and defining metrics and KPIs for each, the system creates a table in which your team specifies the planned monthly cost or benefit over

the period of your synergy model. As the post-merger integration proceeds, the model can be updated with estimated realized results. Based on interim real or estimated results, your team can re-forecast estimates for the KPIs. As each key metric and associated KPI concludes, actual realized values are input in the Value Tracker model to measure actuals versus planned and/or re-forecasted expected benefits.

## Enhanced Visibility & Centralized Outcome Tracking

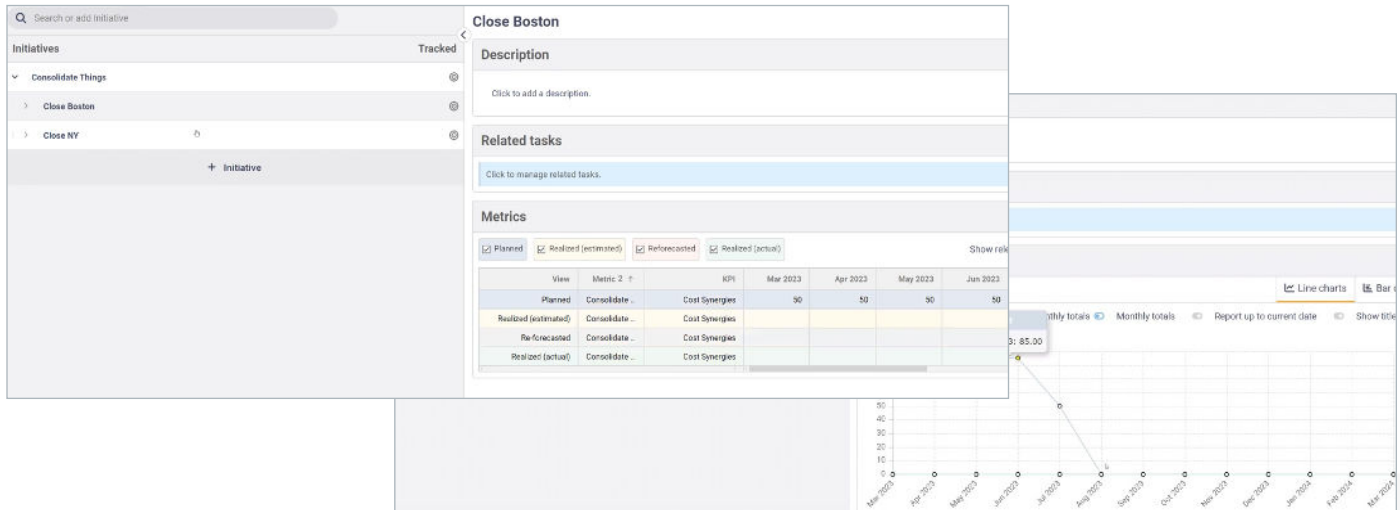
Midaxo Value Tracker centralizes the forecasting and measurement of acquisition outcomes within your M&A platform and ties tracked outcomes to post-merger integration tasks. Your team can track the performance to goals of your deals by:

- Identifying issues and opportunities arising during the integration process
- Learning from prior deals to improve your value forecasting for future deals
- Comparing deal outcomes to each other to identify key success factors

- **Centralize forecasting and measurement of outcomes**
- **Tie tracked outcomes to PMI tasks**
- **Ensure realized value meets or exceeds projected outcomes in the deal thesis**

# Use Cases

Midaxo Value Tracker is a valuable tool for organizations that need to centrally manage their deal integration efforts to ensure realized value meets or exceeds the outcomes projected in the deal thesis. It is also an important tool for organizations that seek to learn from their deal outcomes so they can improve their M&A playbooks to ensure improvements in future deals.



# Conclusion

Midaxo Value Tracker is a smart approach for forecasting and monitoring deal synergy to ensure all expected benefits are captured from each acquisition. Tying initiatives to specific integration tasks in an end-to-end M&A platform ensures no key actions are left undone and all expected benefits are realized. For leading edge companies, tracking value and learning over time from a series of acquisitions enables them to create and evolve their playbooks to optimize benefit capture during post-merger integration. To learn more about the Midaxo Value Tracker, please [schedule a demo](#) now.



## About Midaxo

Midaxo is the productivity platform for dealmakers acquiring companies or other high-value business assets. The multi-module Midaxo SaaS platform can be custom configured for each customer to enable M&A leaders at large and medium enterprises and Private Equity-backed companies to identify, evaluate, prioritize, close, and integrate new assets with unprecedented speed and accuracy. The deal sourcing module makes it easy to identify, evaluate, and prioritize 5x more targets. The collaborative due diligence module reduces diligence time 50% compared to traditional approaches. The structured integration module supports systematized post-merger management, accelerating integrations up to 40%. The platform functions as the system of record while reducing risk throughout the acquisition process. Midaxo customers include Ascensus, Banner Health, Daimler AG, Professional Services Co., and United Site Services. For more information, visit [www.midaxo.com](http://www.midaxo.com).