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## Case Study:

### Writing an M&A Playbook for Award-winning Growth in Healthcare



By Dan Avery

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#### The Challenge

Like many healthcare organizations, a national leader in behavioral health had set its sights on growing through acquisitions. With investment from a private equity firm, the company acquired an independent clinic in a new market and wanted to integrate operations, employees, assets and patients as quickly as possible. Longer term, leadership wanted to improve the company's overall approach to post-merger integration. The company engaged Point B to help onboard its latest acquisition and create a repeatable framework set to optimize future integrations.

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#### Immediate and long-term wins

We partnered with our client's executive team to define its integration strategy and develop an integration roadmap with clear priorities. Moving quickly into execution, we led the overall program and managed the crucial integration of clinical staff and administrative processes.

In guiding the company through the integration, it was important to develop interim operational processes to support the growing business while long-term, scalable enterprise solutions were being implemented (e.g., Electronic Medical Records and new financial systems). As we helped integrate the new care site, we designed the merger and integration framework and transitioned it to an internal business leader who will be responsible for future acquisitions.

#### Honoring the human element

We drew on Point B's healthcare expertise to address post-merger issues unique to the industry. Often, senior leaders in healthcare are clinicians with limited business experience to scale operations. We

worked closely with leadership to build and execute a plan that excels from an operational point of view.

While people play a vital role in any M&A, healthcare is a uniquely human enterprise. Given our client's specialized niche in behavioral health, we developed a highly tailored integration framework to serve its clients, retain staff, and acquire independent clinics. We led our client through repeatable processes that made the most of their new assets while retaining the referral base, capabilities, and staff from the clinics they acquired.

#### Outstanding corporate growth

Since we began working with our client in 2013, the company has leveraged this integration process to grow through a series of successful acquisitions.

The business community has taken note: In 2018, our client was awarded for Outstanding Corporate Growth by the Association for Corporate Growth (AGC) in Colorado. Healthy integration, healthy growth.

Find out how Point B can help you achieve your vision. Visit [pointb.com](http://pointb.com) or contact us at [insights@pointb.com](mailto:insights@pointb.com).