THE CPO'S POST-M&A PLAYBOOK

Accelerating Value in the First 90 Days

SpendHQ

Introduction

Mergers and acquisitions are high-stakes events that promise growth, efficiency, and competitive advantage. But for procurement leaders, they also bring complexity—particularly in reconciling duplicate systems, suppliers, and data sets, realizing ambitious targets, and aligning processes and teams to create a unified procurement organization. For CPOs, the integration period is a make-or-break moment to establish procurement as a strategic function and set the organization up for streamlined success.

Following this playbook provides a blueprint for integration, and gives procurement leaders a faster path to impact, better visibility into spend and risk, and a chance to elevate the function's role in delivering post-deal value. It can also dramatically reduce reliance on third-party consultants who often spend weeks building the same foundational data views that procurement teams can now access in days with the right tools. By standing up a consolidated spend view early, teams can skip costly discovery phases and accelerate execution, while still having the option to augment their strategy with external partners if needed.

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The Post–M&A Procurement Challenge: Complexity on Overdrive

After an M&A event, procurement leaders often face the biggest cost savings, people management, and integration challenges of their careers—alongside overlapping suppliers, redundant contracts, and siloed processes. Even more difficult is the data and reporting environment, which inevitably includes:

» Multiple ERP and P2P systems, spend taxonomies, and data standards

» Fragmented visibility into supplier risk and compliance

» Inconsistent performance tracking and reporting between teams

Without a single source of truth, it's nearly impossible to align both legacy organizations under a unified strategy. The newly combined procurement teams need a way to consolidate and analyze all spend data, follow consistent processes, collaborate across entities, and track progress toward synergy targets.

Without that foundation, the results leadership expects from the deal are unlikely to materialize.

1. Start with Spend: Establishing a Trusted Foundation

The first step post–M&A should be building a consolidated, trustworthy view of spend. This means aggregating data from all legacy systems, cleansing it, and categorizing it using a consistent taxonomy and AI-powered enrichment.

Without consolidated, clean, and categorized data, you'll struggle to:

» Identify cost savings opportunities

» Rationalize duplicative suppliers

» Develop unified category strategies

Powered by a $9T procurement dataset and decades of real-world categorization logic - solutions like *SpendHQ's Spend Intelligence* deliver faster, more accurate spend consolidation, cleansing, and categorization— outpacing legacy tools and generic S2P platforms.

2. Visualize Opportunities with Spend Analytics

Once spend data is centralized, it becomes possible to use the data to identify opportunities to drive cost synergies, improve working capital, and mitigate risk. Following an M&A event is a particularly critical time for procurement to view holistic datasets and build initiatives around the following:

Supplier Rationalization

Identify and eliminate duplicate vendors and redundant contracts across entities.

Leverage Combined Spend

Use increased volume in key categories to negotiate better pricing and terms.

Price Discrepancies

Compare pricing across entities and use those data points to drive cost alignment.

Working Capital Optimization

Review payment terms and ensure all spend uses the most favorable terms.
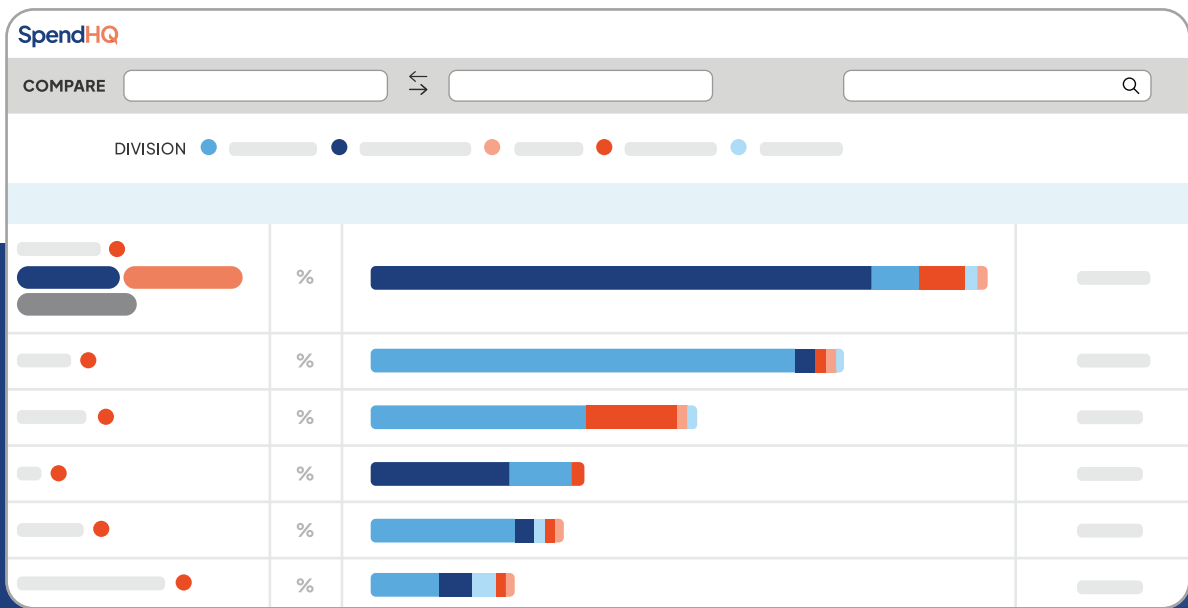
Category Strategy Alignment

Build unified strategies that reflect the new organization's scale and needs.

Risk Exposure

Add risk metrics—financial, cyber, ESG, and more—to spend data to flag critical concerns.

# 3. Standardize Procurement Processes and Stakeholder Management

When combining two procurement organizations, each organization will likely have different approaches for sourcing projects, supplier negotiations, and stakeholder engagement and approval.

When beginning to execute projects post-merger, procurement executives should:

✓ **Establish standardized sourcing,** Negotiation and approval processes to ensure best-in-class results and compliance with organizational standards.

✓ **Identify and collaborate** with business and technical stakeholders from both entities to ensure project buy-in.

✓ **Implement approval workflows** based on spend amount, category, region, etc.

💡 Pro Tip

Leveraging technology like *SpendHQ's Performance Management* module makes it simple to process compliance, manage stakeholder collaboration, and document project approvals.

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| Phase/Status/Task	Dates	May	June	July	August
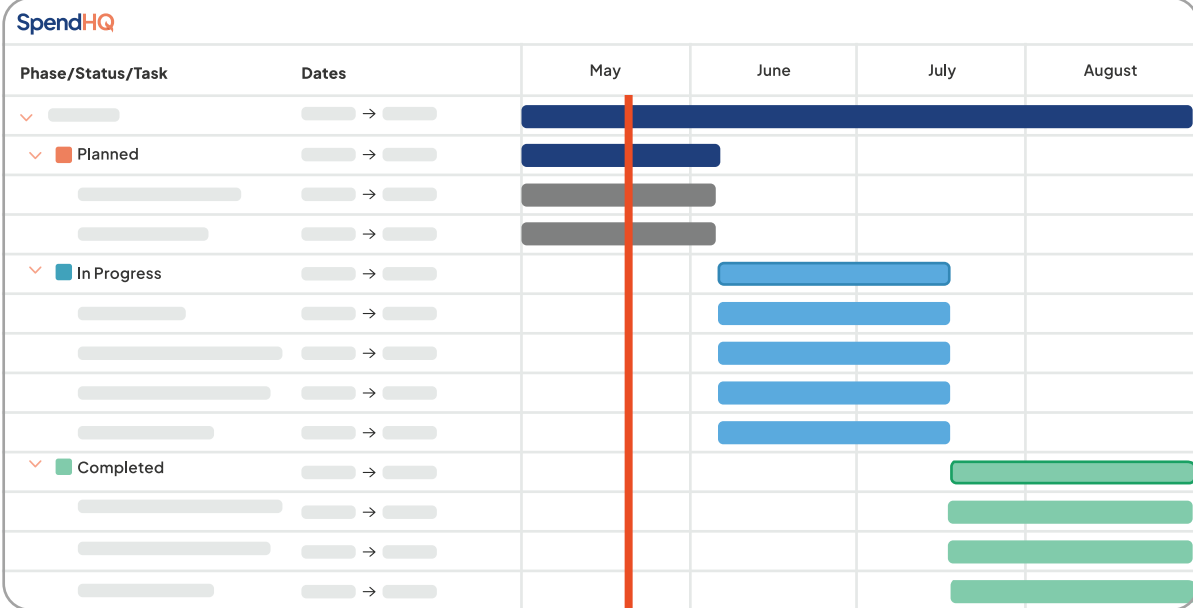
4. Track In-Flight Projects, Results, and Progress Towards Objectives

After building a shared understanding of spend and standardizing processes, the next imperative is execution.

All too often, project execution and results tracking rely on static spreadsheets and scattered project trackers. This delays team collaboration, stalls decision-making, and creates an environment where it is difficult to track progress towards organizational goals. Centralized performance management tracking tailored for procurement.

>> Strategic initiatives (e.g., cost synergy targets, ESG) are tracked in one place

>> Teams across both legacy companies understand ownership, milestones, and outcomes

>> Executive stakeholders have visibility into progress against integration KPIs

SpendHQ's Performance Management solution is purpose-built to align procurement initiatives to strategic business goals with real-time dashboards, configurable pipelines, and built-in collaboration tools.
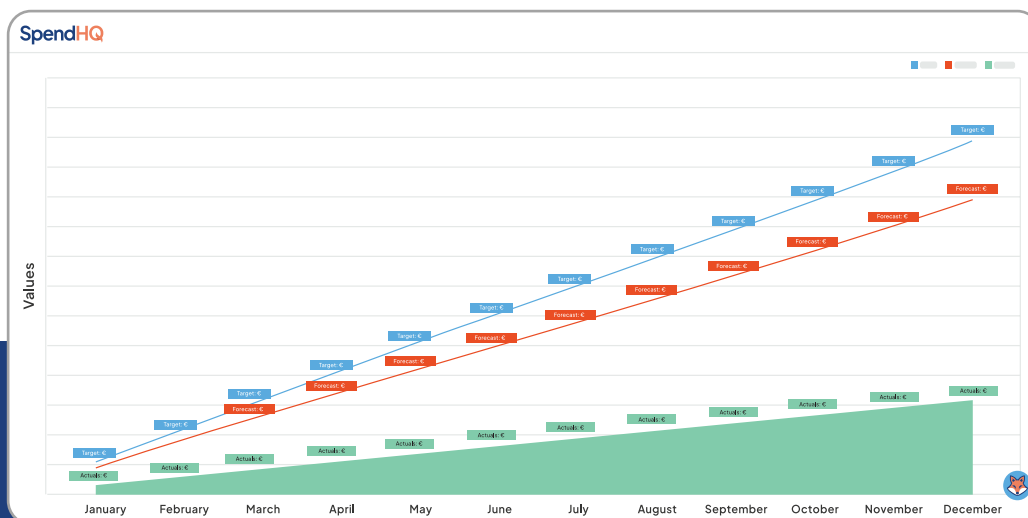
5. Empower Teams Through Usability and Self-Service Access

Even the best data strategies can fall flat post-merger without strong adoption. If tools aren't intuitive or built for real workflows, they won't get used—no matter how powerful they are.

Procurement, finance, and operations teams need to explore data, track progress, and uncover insights independently—without waiting on technical gatekeepers.

Investing in user-friendly, self-service analytics enables faster decisions, smoother integration, and broader engagement. When everyone from analysts to executives can access and act on insights, procurement becomes a more visible, valuable force in the transformation.

6. Manage Hidden Risk in a Combined Supplier Landscape

Post M&A, one of the most overlooked but mission-critical areas of procurement is supplier risk. As companies merge, they inherit each other's supply bases — along with the latent risks embedded in them. These risks aren't just financial or operational, they increasingly involve ESG, cybersecurity, geopolitical, and compliance exposure.
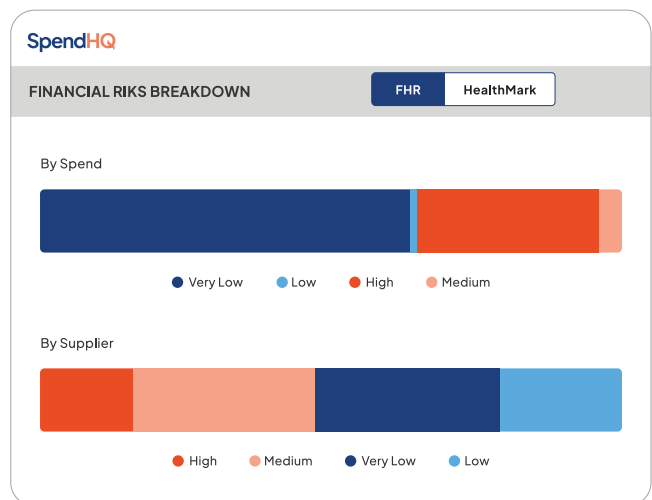
Without a centralized way to assess and monitor supplier risk across both legacy entities, organizations may unknowingly increase their vulnerability just as they aim to scale operations.

By embedding supplier risk insights directly into spend and supplier views, procurement can evolve from a reactive cost center into a proactive risk partner—during integration and beyond. This protects business continuity and positions procurement as a linchpin in enterprise resilience.

Pro Tip

Leverage SpendHQ's *Tariff Impact Dashboard* to gain instant visibility into how global trade policy changes impact your suppliers, categories, and sourcing strategy.

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| FINANCIAL RIKS BREAKDOWN | FHR | HealthMark |

By Spend

● Very Low   ● Low   ● High   ● Medium

By Supplier

● High   ● Medium   ● Very Low   ● Low

Where *Advanced Supplier Risk Intelligence* Comes In

1 **Map risk across the full combined supplier base.**
Use real-time metrics to identify vendors with sanctions exposure, cyber vulnerabilities, or ESG violations.

2 **Layer in financial and geopolitical data.**
Acquisitions often open new geographies, which may include regulatory or stability risks not previously monitored.

3 **Unify risk visibility across functions.**
Integrate risk dashboards into procurement workflows so that sourcing, compliance, and finance teams can take action in sync.

A Roadmap for CPOs: 90-Day Plan

DAYS 1-30

- ✓ Run a rapid data audit of all procurement systems
- ✓ Stand up a unified spend cube using a spend analytics tool
- ✓ Identify priority categories and suppliers for synergy realization and supplier rationalization
- ✓ Standardize procurement policies, processes, and approval workflows

DAYS 31-60

- ✓ Begin executing quick win and high-priority synergy realization and supplier consolidation initiatives
- ✓ Partner with cross-functional stakeholders from both entities to build relationships and ensure buy-in with key initiatives
- ✓ Integrate spend analytics with performance management to begin tracking synergy and savings projects
- ✓ Establish a cross-functional steering group including finance, legal, and operations
- ✓ Embed supplier risk metrics into onboarding and rationalization workflows

DAYS 61-90

- ✓ Report early wins (e.g., cost savings, consolidated contracts, eliminated duplicate suppliers)
- ✓ Track progress towards realizing organizational goals in self-service dashboards available for all applicable business users
- ✓ Plan phase two initiatives (e.g., ESG harmonization, advanced PO analytics)

Final Thought

Post-M&A integration is a test of procurement leadership. CPOs who can wrangle data chaos, unify strategy, and deliver measurable value in the first 90 days will position procurement as a permanent strategic partner—not just an operational function. By establishing visibility and structure early, teams accelerate impact and reduce costly dependence on external consultants often brought in to build what procurement can now deliver internally—faster, and at a fraction of the cost.

SpendHQ exists to help you make that transition faster, smarter, and with confidence.

Ready to unify your spend strategy after an M&A?

Learn how SpendHQ's platform helps procurement turn data chaos into strategic clarity.

Let's Talk

About SpendHQ

SpendHQ empowers procurement leaders at complex organizations to make important decisions with confidence by providing a single source of truth for spend data, project tracking, and performance management. By integrating the full procurement workflow teams can easily execute strategy and deliver on their goals related to cost savings, ESG, risk reduction, compliance, and more.

》 *Spend Intelligence* leverages AI to organize, cleanse, and analyze procurement data, delivering actionable insights and automated reporting.

》 *Performance Management* helps large cross-functional teams turn data into strategic value, ensuring alignment on top priorities.