

BUSINESS SYSTEMS & TRANSFORMATION

Leading Real Estate Investment Trust



ENGAGEMENT OVERVIEW

A leading real estate organization acquired a family-owned company, creating the need to integrate two accounting and finance operations that relied on different systems, processes, and operating practices. With an aggressive integration timeline, leadership needed a clear understanding of how both organizations operated before making decisions around systems, staffing, processes, and Day 1 integration priorities.

Alliance was engaged to document the current state across both organizations and establish a structured foundation for integration. Over approximately six weeks, the team captured more than 160 processes, identified gaps and operational differences, documented critical institutional knowledge, and developed the governance and planning tools needed to move the integration forward.

[alliance]

ALLIANCE SOLUTION

Alliance provided hands-on support to establish a clear foundation for integration, including:

01

Current-State Assessment

Conducted cross-functional workshops to document how accounting and finance processes, systems, roles, and responsibilities operated across both organizations.

02

Process & Gap Documentation

Captured 160+ processes, creating a side-by-side view of key differences, dependencies, gaps, and areas requiring alignment.

03

Integration Roadmap

Defined which processes should be connected at Day 1, retained, or deferred to a future trigger event.

04

Governance & Action Planning

Developed the governance model, integration framework, RAID log, and action plan to guide execution.

CLIENT OUTCOMES

- Reduced integration risk by providing the clarity needed to make informed decisions around staffing, systems, and process alignment.
- Accelerated integration planning by eliminating the need to repeatedly uncover processes, responsibilities, and institutional knowledge.
- Strengthened operational continuity by reducing key-person dependency and creating a foundation for more effective onboarding, training, and audit readiness.