

Building M&A Excellence: How IMAA Helped a Leading Professional Services Firm Standardise Its Advisory Practice

Empowering teams with the tools, structure and confidence to deliver consistent M&A outcomes

Before introducing IMAA's tailored training programme, a leading US-based professional services firm recognised a gap in its M&A advisory approach. Although they had a successful Integration & Separation Advisory Practice, their professionals worked in silos, using various methodologies for crucial tasks such as target identification, valuation and due diligence. There was also a growing demand for sharper client communication skills and a consistent framework that would unify teams across different service lines.

Following the completion of the one-week onsite training, managers, directors and principals earned the International Mergers & Acquisitions Expert (IM&A) and Certified Post Merger Integration Expert (CPMI) certifications. Armed with fresh insights and reinforced skills, participants returned to their respective teams ready to implement a structured, repeatable M&A process. This transformed the firm's client-facing capabilities, enabling professionals to communicate complex M&A concepts more effectively, while also fostering seamless collaboration between different practice areas. In turn, this holistic approach led to improved deal execution, greater client satisfaction and a more resilient competitive stance in the market.

IMAA provided the crucial link between the firm's existing strengths and its aspirations for growth. By creating an immersive programme tailored to the firm's specific needs and delivered at a preferred location, IMAA ensured participants gained hands-on exposure to real world M&A challenges. Through interactive workshops, case studies and deal simulations, the training bridged knowledge gaps, encouraged cross-practice cooperation and established standardised methodologies. As a result, the firm is now equipped to deliver integrated M&A advisory services that add meaningful value to both new and existing clients.