

MAAITM – Huntzinger’s Merger, Acquisition & Affiliation Information Technology Methodology

A Playbook to Facilitate Organizational Integration.



The MA&A IT Challenge

Healthcare organizations are becoming increasingly involved in expanding organizational relationships, including mergers, acquisitions, and affiliations (MA&A). Information technology (IT) is typically not a priority consideration when hospitals and healthcare systems enter into MA&A activities – an unfortunate situation given the fact that IT can bring significant value and risk to any healthcare MA&A activity. Healthcare organizations that ignore the risk and value aspects of IT early in the MA&A due diligence process, whether acquiring or merging another hospital, or acquiring a physician practice – may not only miss opportunities to add specific value considerations to a deal, but may miss risks that can come back to haunt both the “acquirer” and the “acquired, merged or affiliated” organization after the deal has been completed.

Huntzinger’s MA&A Services recognizes the importance of including IT as a formal consideration early in the MA&A process. As such, Huntzinger starts with a proven Merger, Acquisition, and Affiliation Information Technology Methodology (MAAITM), which is a standardized set of tools and processes that are customized to the unique characteristics and requirements of each specific relationship, providing an actionable playbook to define the structured process for initial due diligence and a series of phased tools that can be utilized as the particular MA&A review progresses. The outcome is a seamless, efficient, and effective IT ecosystem that maximizes the benefits of the relationship.

Our Approach

IT is typically not the primary rationale for merger, affiliation, and acquisition agreements, yet IT often introduces unexpected complications. Our MAAITM approach focuses on the various MA&A business models, each model having its own set of complexities, tentacles, and impact to other models. We understand the related challenges and how to assist you in addressing them in a manner that maximizes the benefits of the new relationship. We work with you to understand your strategic objectives of the new relationship, that will drive the contents of your MAAITM playbook. By applying a set of standard processes and tools, and customizing those tools to meet the specific needs of your organization, we develop a customized MAAITM playbook specific to your organization, which can be used to achieve your strategic objectives and maximize the benefits of your business relationship.

Our approach follows four advisory phases to develop the customized MAAITM playbook, with an optional fifth phase, Implementation, to assist the organization(s) in successfully executing the expected outcome.



The MAAITM Phases Include:

- **Organization Vision** – MAAITM begins with defining the Organization Vision, in which key questions are answered that pertain to organizational strategic objectives for the relationship, that once defined, establishes the direction for IT and the business model that IT is expected to support.
- **Due Diligence** – Documentation is then reviewed and interviews with key stakeholders and subject matter experts are conducted.

“We contracted with Huntzinger to develop a custom set of documents and processes that will function as our MA&A IT Playbook. The IT Playbook helps us streamline our internal processes and involvement. There is also crossover in how we open new buildings, clinics, and facilities – we anticipate using the IT Playbook to guide those activities as well.”



Andrew Rosenberg, MD
Associate Professor, Anesthesiology & Internal Medicine
Chief Information Officer for Michigan Medicine
Interim Vice President for IT and CIO for University of Michigan



- **MA&A Playbook** — The MAAITM playbook is then produced and customized, containing such key documents as a Cost Model/Total Cost of Ownership (TCO), Technical Impact (infrastructure, interfaces, software/applications etc.), personnel on-boarding, and a detailed transition plan.
- **Knowledge Transfer** — In this extremely critical phase, and one frequently neglected, there is a transfer of knowledge to the organization(s) on how the MAAITM playbook will be used to perform the integration, a communication process and protocol that will facilitate consistent and ongoing communication to key stakeholders, and how to use the MAAITM playbook to manage future mergers, acquisitions or affiliations.
- **Implementation (optional)** — An optional fifth phase is available for Huntzinger to assist the organization(s) in executing the direction provided in the MAAITM playbook.

Our Experience

Huntzinger has extensive experience in healthcare IT MA&A, and our MAAITM approach uniquely positions us to assist your organization with establishing an effective and economical MAAITM playbook to integrate your IT operations and systems. We have in-depth experience on both the ambulatory and acute sides of MA&A and have been on the buy and sell side of these types of relationships. We will work with you to develop an MAAITM playbook that will help you formalize the MA&A due diligence process and identify IT specific opportunities and risks as part of the new relationship. This playbook will become part of your MA&A IT integration strategy for all future MA&A initiatives.

Advisory	Implementation
 <ul style="list-style-type: none"> • IT assessments to ensure alignment with organizational business strategy and objectives • Strategic recommendations to address integration opportunities • Execution roadmaps that achieve organizational alignment • Regulatory assessments targeted to ensure compliance • System selection/consolidation/decommissioning, contract negotiation, pre-implementation planning 	 <ul style="list-style-type: none"> • Extensive MA&A integration expertise across multiple organizations • Deep technical expertise and experience in diverse platforms • Comprehensive implementation and go-live planning • Project management that keeps your efforts on track, on budget • Effective integration of processes with technology • Thorough change management to optimize system effectiveness

What Sets Us Apart

- **Experience** — Huntzinger’s leadership has first-hand experience with MA&A. We provide seasoned resources, most having more than 25 years of healthcare information systems experience and have led IT MA&A integrations at large academic facilities and healthcare systems.
- **We Listen** — We know and understand what it takes to manage IT MA&A relationships and unify disparate organizations via a successful governance process, leveraging organizational information, communication and ultimately integration of IT technology.
- **Practical Approach** — We do not come in with a “cookie cutter” approach to IT MA&A activities. Huntzinger brings relevant tools and methodology with experienced resources to work with your organization to develop and implement a customized action plan to achieve benefits.



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