Databender

FREE GUIDE

Post-Acquisition Visibility

Unified Reporting in Weeks, Not the 18-Month Integration Timeline

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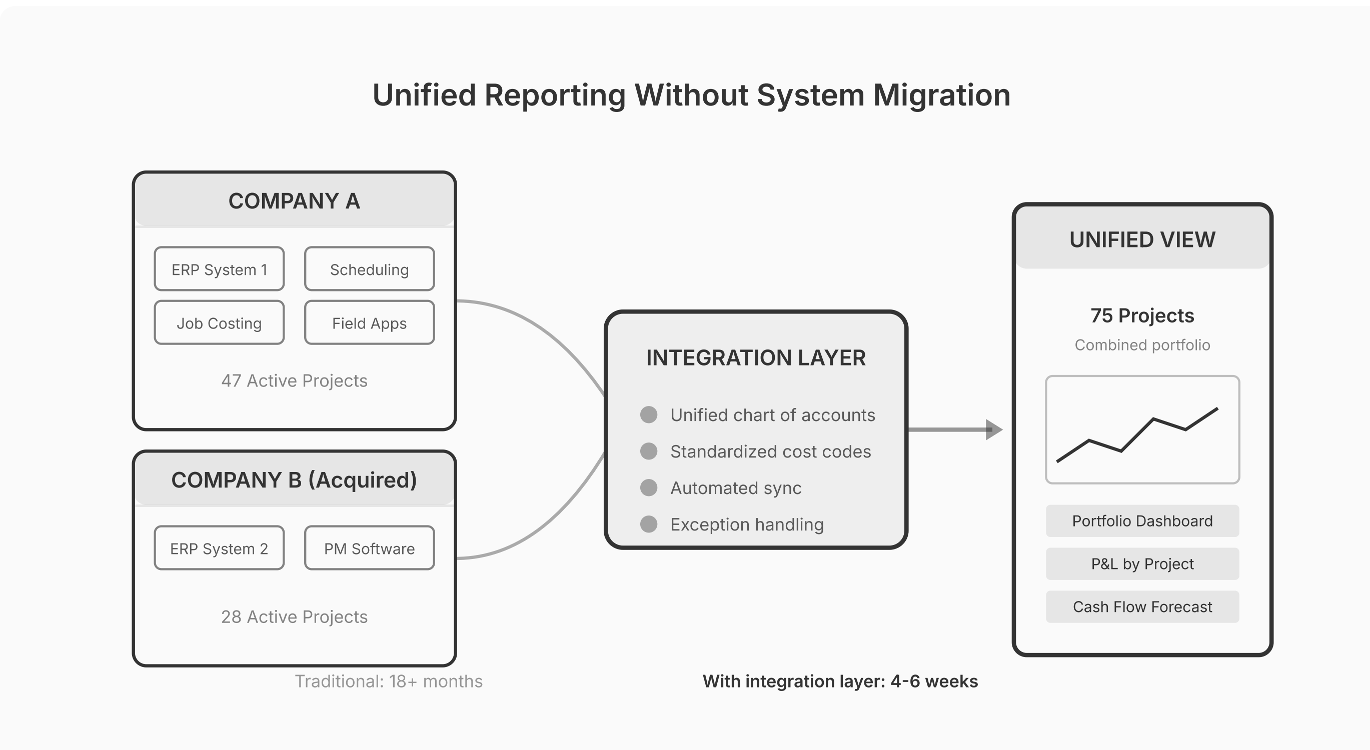
Weeks

Not 18 Months

Get unified reporting in weeks instead of the typical 18-month timeline.



You just closed on an acquisition. Congratulations. Now you have two companies, two accounting systems, two ways of tracking job costs, and no idea how the combined operation is actually performing.

The standard advice: Plan an 18-month systems integration. Spend $500K+ migrating to a common platform. Hope nothing breaks during the transition. Get unified reporting sometime in 2027.

That's one path. There's a faster one.

The Visibility Gap

Private equity operating partners know this frustration intimately. They've bought a platform company and added bolt-ons. Each acquisition brings its own systems. Sage. Foundation. QuickBooks. Viewpoint. Custom Access databases someone built in 2009.

Getting a single view of the combined business requires manual consolidation. Someone exports from each system, reformats in Excel, maps cost codes that don't quite align, and builds a report that's already two weeks stale by the time it's finished.

Board meetings become exercises in data archaeology. "What's our backlog across all companies?" Should be a simple question. Takes three days to answer.

The acquired company's leadership can't answer basic questions about their own performance because the metrics don't match how the parent company tracks things. Everyone's frustrated. The deal thesis assumed synergies that can't be measured because the data won't cooperate.

> *Integration takes 18 months. Visibility shouldn't.*

Unified Applications Without Full Integration

The traditional approach is wrong. You don't need to migrate systems to get unified reporting. You need to connect systems.

Each company keeps running their existing software. Sage stays Sage. Foundation stays Foundation. The superintendents don't need to learn new workflows. The accounting team doesn't need to rebuild their processes.

What changes: a unified layer sits on top, pulling data from all sources, normalizing it to common definitions, and presenting a single view of the combined operation.

This isn't a dashboard. Dashboards show charts. This is an application layer that supports real work. Pull up a project from any company and see consistent information. Compare job margins across entities using the same methodology. Run a backlog report that includes everyone without manual consolidation.

A PE-backed contractor with three acquisitions built this unified layer in eight weeks. Before: two days of work every month to build consolidated financials. After: financials update automatically. The controller spends those two days on analysis instead of data processing.

Standardizing Job Costing Across Companies

Every contractor tracks job costs differently. Company A has 50 cost codes. Company B has 200. Company C uses a hierarchy that made sense to someone 15 years ago but baffles everyone else.

Forcing everyone onto the same cost code structure is a multi-year project. Mapping between structures takes weeks to set up and hours to maintain.

The middle path: build a unified cost code taxonomy for reporting purposes while letting each company keep their operational codes.

Define the 30 or 40 categories that matter for leadership. Labor. Material. Subcontractors. Equipment. Divide those into the subcategories you actually track. Create mapping rules that translate each company's native codes into the common taxonomy.

Company A's cost code 4100 becomes "Concrete Labor" in the unified view. Company B's code 301.01 becomes the same thing. The mapping happens automatically. Reports show consistent categories. Drill-down shows native detail.

One multi-company GC spent six months trying to standardize cost codes across their operation. They'd make progress, someone would deviate, the whole thing would break. When they shifted to mapping instead of standardizing, the problem was solved in three weeks. Each company kept their codes. The reporting layer handled translation.

Board-Ready Reporting in Weeks

Private equity boards want specific information in specific formats. They don't care about your systems complexity. They want to know backlog by company, revenue by month, margin by project, and cash position across entities. They want it in their format. They want it accurate. They want it on time.

Building board reports manually is miserable. Someone spends two or three days before every board meeting pulling data, reconciling differences, and building decks. Then the board asks a question that requires drilling into the underlying data, and the scramble starts.

Automated board reporting changes the dynamic. The numbers are always current. The drill-down is available. Board prep becomes review and analysis instead of data gathering.

A construction PE portfolio company went from three days of board prep to half a day. Same reports, same depth, same ability to answer questions. The difference was automation. Data pulled automatically from three accounting systems. Standardized. Formatted. Ready.

The PE partners noticed. "This is the first portfolio company where we trust the numbers in real-time," one said. Trust accelerates decisions. Decisions accelerate returns.

What to Tackle First

Don't try to solve everything at once. Prioritize based on what's hurting most.

First priority: Consolidated financials. Revenue, costs, margin by company and combined. This is what boards ask about. This is what drives decisions. If you can't produce consolidated financials quickly, you're flying blind.

Second priority: Backlog visibility. Signed contracts awaiting completion. Awarded projects not yet started. Proposals outstanding. The revenue pipeline across all companies. This drives forecasting and resource planning.

Third priority: Project-level comparison. The ability to look at similar projects across companies and compare margins, productivity, and outcomes. This is how you find operational improvements. This is how you identify which practices from which company should be standardized.

Everything else can wait. Equipment tracking. HR consolidation. Safety reporting. All important eventually. None of them are blocking the deal thesis.

A three-company roll-up we worked with had 40 things on their integration list. They prioritized the top three. Got visibility in six weeks. Tackled the next three. Got more visibility. By the time they'd addressed ten items, they had better information than most single-company contractors. The other 30 items? Some got handled. Some turned out not to matter.

What Can Wait

Systems migration is almost always deferrable. If everyone's currently using functional software, forcing a change destroys productivity for months. The payoff comes eventually, but the pain comes immediately.

Wait until you have a real reason to migrate. End of life on existing software. Scaling beyond current capabilities. Actual problems that justify the disruption.

Most acquisitions don't need full systems integration for years. Some never need it. A holding company structure with unified reporting can work indefinitely. The parent sees consolidated results. Each subsidiary operates independently. Everyone's happy.

Detailed process harmonization can also wait. Yes, eventually you want consistent estimating approaches. Yes, eventually you want aligned safety programs. But "eventually" means after you have visibility, after you've identified which approaches are better, after you've earned enough credibility with acquired teams to lead change.

Move too fast on harmonization and you trigger resistance. Move too slow on visibility and you can't make decisions. Get visibility first. Harmonize based on what the data tells you.

The Technology Layer

Unified visibility requires three technical components.

> **Data extraction:** Connections to each source system that pull relevant data on a regular schedule.

Read-only. Non-disruptive. The source systems don't change. Data flows out automatically.

Transformation layer: Logic that normalizes data across systems. Cost code mapping. Revenue recognition alignment. Currency conversion if applicable. The rules that turn disparate data into consistent information.

Application layer: The tools people actually use. Consolidated financial views. Cross-company project comparison. Backlog reporting. Board decks. The outputs that justify the investment.

Modern data tools make this cheaper than it used to be. What would have cost $200K+ five years ago now runs $40-60K. Implementation that took six months now takes two. The barrier isn't technology or cost. The barrier is deciding to do it.

Timeline Reality

Week 1-2: Assess current systems. Understand what data exists where. Define priority outputs.

Week 3-4: Build data extractions. Establish connections to source systems. Verify data quality.

Week 5-6: Create transformation rules. Map cost codes. Align definitions. Build the logic layer.

Week 7-8: Deploy applications. Consolidated financials. Backlog view. Initial board reporting.

Week 9+: Expand. Project comparison. Drill-down capabilities. Additional metrics. The foundation is in place. Building on it is incremental.

Eight weeks to useful visibility. Not perfect visibility. Not complete integration. But enough to make decisions, run board meetings, and start identifying operational improvements.

Compare that to the standard 18-month timeline. In 18 months, you could have built unified visibility, operated with it for a year, made three or four significant operational improvements, and still not need the full systems migration you were planning.

The Acquisition Playbook

PE firms doing multiple acquisitions should have a standard visibility playbook. Day one: deploy data extraction. Week two: initial reporting. Week four: board-ready consolidation.

The playbook gets faster with each acquisition. The transformation rules already exist. The application templates are built. Adding a new company becomes a two-week project instead of an eight-week project.

One PE firm with a buy-and-build thesis in construction services has integrated six companies using this approach. Each new acquisition gets visibility in under a month. The portfolio operates with better information than any single company could produce on its own.

Speed matters in PE. Faster visibility means faster decisions. Faster decisions mean faster value creation. Faster value creation means better returns.

Closing an acquisition and need visibility fast? Talk to our team about unified reporting for your portfolio, or learn more about our construction solutions.