

What M&AOP Does & Where It Fits in Your Deal Process

Part 1: What is the M&AOP Platform?

The Problem It Solves

Over 70% of deals fail to capture intended value. Most failures trace to misaligned strategy and fragmented execution between the decision to do a deal and how it gets executed. Before M&AOP, there hasn't been a system to capture deal rationale, translate it into what diligence teams should validate, what scope to prioritize for integration, or what deal metrics to track to measure success.

M&A teams have historically operated with a patchwork of spreadsheets, slide decks, email threads, and sometimes project management tools - typically 6–8 fragmented tools across the deal lifecycle, most of which are not M&A-specific. To glue these things together on each deal project, teams rely on a high degree of stakeholder meetings to prompt manual workflows (review materials, produce reports and project checklists, chase inputs on status and decisions, etc). The result: M&A practitioners spend roughly 60% of their time on coordination rather than the deal work itself.

The M&A “Capability Cliff” has deepened these challenges. Today's lean M&A teams of 2–5 people are doing the work that once required 8–12, while global M&A accelerates in volume and complexity. Lack of strategic rationale articulation visible across teams, ongoing anchoring between strategy and execution, and execution inefficiency due to manual workflows, are fundamental challenges to deal ROI industry-wide.

What M&AOP Does

M&AOP is the AI operating platform for M&A - the layer that turns deal theses into realized value by anchoring rationale to execution across every phase and workstream. It provides strategic guidance and automates deliverables, workflows, reporting, and monitoring of risks and alignment across deals.

At its simplest, M&AOP is to M&A what a CRM is to sales. Before Salesforce, salespeople had contacts, deals, and forecasts scattered across tools and documents. Salesforce isn't where the selling is executed; it provides a single source of truth for GTM data, guides sales strategy decisions, embeds best-practices process, and offers tools to automate sales team visibility and governance. Similarly for M&A, M&AOP gives teams a unified platform for deal strategy creation, validation, and decision-making.

With M&AOP, teams can:

- **Define and stress-test why they're doing a deal** - capturing the strategic rationale, expected value, and key assumptions in a structured, living format (the Deal NorthStar).
- **Automatically scope the work that flows from those decisions** - diligence checklists, integration plans, risk assessments - all generated from and aligned to the deal rationale, not from a generic template.
- **Keep everything connected as the deal progresses** - so when something changes (assumptions prove wrong, leaders rotate out, new risks surface), the platform flags the downstream impact instead of letting things quietly drift.

- **Give leadership a real-time view of deal health** - not task completion rates, but a synthesized view of whether the deal is still tracking to the logic that justified the investment, and what measurable outcomes are resulting (targeted synergies, growth, etc).
- **Ingest signals from downstream tools** - pulling execution status, emerging risks, and outcome data from the customer's existing systems back into M&AOP, so the strategic layer is continuously informed by ground truth.

M&AOP reduces resource and labor inefficiencies. M&AOP drastically reduces the manual, fragmented workflows overwhelmingly common in M&A today. M&A teams are finding ways to do this work, but with manual workflows and unpredictable outcomes - without tools purpose-built for it. Existing M&A tools (data rooms, pipeline CRMs, project trackers) are point solutions that handle portions of transaction mechanics or task management. None provide the strategic decisioning layer needed to tie decisions to execution (and guide how point solution tools get used on deals).

Part 2: The Architectural Mental Model

The typical M&A operational stack has three conceptual layers:

Layer 1: Execution	Where tasks get done (email threads, project tracking, ad hoc work within documents, workflows specific to CRM, dataroom, project tracker etc)
Layer 2: Strategy & Decision-Making	Where strategy is formed and decisions get made, validated, and monitored - the operating layer (where M&AOP plugs in).
Layer 3: Data	Where deal-related information lives (in data rooms, documents, CRM, project tracker etc)

Most organizations have Layers 1 and 3 established in some form, with tools supporting. **Layer 2 is usually highly manual and ad hoc - supported by stakeholder meetings and email threads, draining resources and limiting ability to execute precisely and timely.**

M&AOP fills this gap as the operating layer and is designed to complement - not compete with - what a customer has implemented in Layers 1 and 3. It reads from both layers (ingesting data and execution signals) and writes to both layers (generating strategic deliverables, key decisions, and governance outputs). This bidirectional relationship makes M&AOP a living system rather than a static tool.

The Key Concept: How the Operating Layer Works

M&AOP operates as a bidirectional layer rather than a one-way content generator. It both produces strategic deliverables that flow into downstream tools, and ingests execution-level signals from those tools to continuously refine strategic guidance. This bidirectional flow is what makes M&AOP a living strategic hub rather than a static planning exercise.

- **M&AOP is where M&A teams define why they're doing a deal, decide the best way to execute on that strategy, and produce strategic deliverables that convey these decisions.**
- **Other tools are where these resulting strategic plans are applied tactically, and granular related workflows and status are managed.**

- **As insights on status and issues surface in these tools, they flow back into M&AOP to iteratively guide strategic decisions - closing the loop between strategy and execution.**

M&AOP is not trying to replace a customer’s project management tool, their data room, their CRM, or their BI platform. Those tools are good at what they do. What’s missing is the strategic layer that should be informing how all of those tools get used on a deal - and learning from what those tools reveal about execution reality.

Part 3: How This Works in Practice

Strategic Framing (in M&AOP)

The M&A team uses M&AOP to define the deal rationale, stress-test assumptions, and establish the NorthStar - the strategic anchor that everything else aligns to. As other downstream strategic deliverables are defined for a deal project, M&AOP considers this growing body of context to guide ongoing strategy for that project.

Strategizing, Scoping and Planning (M&AOP Generates → Other Tools Receive)

From the NorthStar, M&AOP auto-generates recommended drafts of deal-specific diligence plans, integration plans, risk assessments, and governance frameworks. These are automatically tailored to fit the deal type and context - not one-size-fits-all templates. The plans and deliverables produced within M&AOP can then flow into the customer’s existing tools:

What M&AOP Produces → Where It Goes

What M&AOP Produces	Where It Goes
Integration workstreams and milestones	Asana, Monday.com, Jira, MS Project
Diligence checklist items and findings	Data rooms (Intralinks, Firmex, Box)
Deal milestone and status data	Salesforce, DealCloud, HubSpot
KPI dashboards and executive reports	Tableau, Power BI, or native reporting
Strategic artifacts and documentation	SharePoint, Google Workspace, Box

Execution Intelligence (Other Tools → M&AOP Receives)

The operating layer requires a feedback loop. As execution proceeds in downstream tools, M&AOP ingests status updates, emerging risks, and outcome data from the customer’s existing systems. This allows the platform to continuously validate whether the deal is still tracking to its strategic rationale - and to surface actionable recommendations when it isn’t.

Without this inbound signal, a strategic layer is just a planning tool that goes stale after Day 1. With it, M&AOP becomes the live strategic compass that adapts as ground truth evolves.

What Flows Into M&AOP ← Where It Comes From

Signal Type	Source Tools	How M&AOP Uses It
Integration milestone status and blockers	Asana, Monday.com, Jira, MS Project	Flags execution drift from strategic plan; recommends course-corrections

Diligence findings and risk flags	Data rooms (Intralinks, Firmex, Box)	Validates or challenges NorthStar assumptions; triggers reassessment if material risks surface
Deal pipeline and relationship context	Salesforce, DealCloud, HubSpot	Enriches deal context with pipeline history, stakeholder relationships, and prior deal learnings
Financial performance and synergy tracking data	Tableau, Power BI, ERP systems	Measures actual value capture against targeted synergies; flags gaps for strategic intervention
Stakeholder communications and decisions	Email, Teams/Slack, SharePoint, Google Workspace	Captures decision context and stakeholder alignment signals; updates governance model
Functional workstream deliverables and status	Documents, spreadsheets, functional tools	Assesses cross-workstream dependencies and alignment to deal rationale

Ongoing Governance (M&AOP Monitors, Flags, Adapts)

With both outbound strategic deliverables and inbound execution signals flowing through the platform, M&AOP serves as the strategic hub - tracking whether decisions still align with the original deal thesis, and with each other. When strategic misalignment happens, M&AOP raises alerts and recommendations to enable agile course-corrections. This continuous governance loop is what transforms M&A from a project-based exercise into an operationally excellent, repeatable capability.

Tiger Team M&A is a solutions provider for M&A excellence. M&AOP is enterprise-grade AI that operates, produces, and governs deal strategy, keeping decisions anchored to rationale. We help companies transform their M&A operations into competitive advantage, with a platform purpose-built for M&A strategic decisioning, backed by Fortune 100 expertise.
