

CASE STUDY

Turning Post-Acquisition Priorities into an Actionable Roadmap

CWH Advisors translated diligence findings and leadership perspectives into a focused set of enterprise priorities, supported by a roadmap defining ownership, milestones, and reporting expectations.



CLIENT SNAPSHOT



CLIENT TYPE

Private Equity-Backed HME Provider



INDUSTRY

Home Respiratory Care & DME



ENGAGEMENT FOCUS

Strategic Prioritization & Execution Planning



ABOUT THE CLIENT

A regional respiratory care provider delivering home-based equipment, clinical services, and payer-supported care.

THE BUSINESS CHALLENGE

Following an acquisition, leadership sought to focus a broad portfolio of initiatives on near-term performance and long-term value creation.

- Stabilize revenue cycle performance during a major ERP transition.
- Improve inventory visibility and equipment utilization.
- Establish clear ownership for strategic procurement.
- Align incentives with financial and operational priorities.
- Address cybersecurity and regulatory remediation risks.
- Sequence growth initiatives without overextending resources.

OUR APPROACH



DISCOVER

Synthesized diligence, financial, and operating findings to identify priority issues.



MODEL

Prioritized initiatives based on enterprise impact, execution risk, and resource requirements.



VALIDATE

Tested priorities through executive interviews, pre-work surveys, and a leadership session.



DELIVER

Built a roadmap defining ownership, milestones, resource needs, and reporting expectations.

OUTCOMES & VALUE DELIVERED



PRIORITY FOCUS

Focused leadership on the initiatives most important to near-term performance.



LEADERSHIP ALIGNMENT

Established consensus on shared priorities and the rationale behind each decision.



EXECUTION ROADMAP

Defined ownership, milestones, resource needs, and reporting expectations.



VALUE CREATION

Directed investment toward high-impact initiatives while reducing execution risk.



WHY IT MATTERS

Post-acquisition value creation depends on a manageable agenda and clear accountability. A focused roadmap directs attention and resources to the initiatives with the greatest near-term impact.



FACING A SIMILAR CHALLENGE?

Let's connect to discuss how CWH Advisors can focus enterprise priorities and build a practical execution roadmap.



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