

# Due Diligence: Leveraging Today's Innovative Tools & Techniques for Securing a Good Deal Self-Study Webinar (11 Hours)

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Self Study Webcast  
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## Overview:

Today's innovative technologies are empowering financial professionals to be more efficient and effective in the due diligence necessary for securing successful transactions. The M&A process has been redefined to ensure greater accuracy in valuations, and for improved decision-making on both the buyer and seller sides of the transaction. This self-study webinar focuses on the full scope of the modern due diligence process, and shows you how to:

- Apply the latest digital platforms and software programs, social media and other tools designed to speed up the due diligence process and enhance your chance for success in every transaction
- Merge today's innovative tools and techniques with traditional analytical and critical thinking methods to optimize the full scope of the due diligence process—from establishing the need for a transaction and the letter of intent, through post-closing implementation
- Utilize multiple valuation techniques with the goal of determining fair valuation for the transaction, and possibly negotiating better pricing or terms

## Objective:

To provide CPAs and other financial professionals with the knowledge and skills to leverage today's modern tools and techniques in performing successful due diligence. Through hands-on case studies and examples, you'll gain the confidence to apply these tools for securing a good business deal.

[Detailed Learning Objectives](#) [1]

## Emphasis:

- Evaluating the decision for acquisitions, partnerships, joint ventures, etc.
- Why acquisitions succeed or fail
- Expansion of the definition and application of due diligence practices
- Self examination of best strategy to meet your organization's mission
- Acquisition criteria
- When to use intermediaries and outsourced expertise
- Analysis of initial data
- S.W.O.T analysis of target (Strengths, Weaknesses, Opportunities and Threats)
- Preliminary valuation
- Letter of Intent (LOI)
- Schedule/manage the due diligence process
- Assembling the due diligence team and establishing goals and timelines
- Revisiting and confirming pre-LOI initial information
- Using leading-edge software to perform synergy modeling, the financial audit and analysis
- Detailed due diligence drill down to all functional areas: Sales, Marketing, Finance, Accounting, Operations, Product Development, Engineering, HR, Administration and General Management, Legal, etc.
- Management team capabilities—lock in key personnel



- Using due diligence findings to restructure a deal or build a positive culture post-closing
- New valuation tools—software applications to build models for income, asset and market approaches

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**Bottom Prerequisite:**

Basic knowledge of financial and operational auditing.

**Preparation:**

No advance preparation required.

**Level of Knowledge:**

Intermediate.



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**Links:**

[1] [https://www.cpeonline.com/JavaScript:showObjectivesPopup\(\);](https://www.cpeonline.com/JavaScript:showObjectivesPopup();)