

# CASE STUDY: MERGER & ACQUISITIONS



## Customer Profile

Client is a large global company whose North American operations have historically focused on power generation in the United States, Canada, and Mexico. The company has also been involved in some retail energy in the US as well. In the past, they have dealt with multiple forms of litigation that include investigations, regulatory matters, employment issues, trading litigation, and M&A.

## Business Challenge

Client is going through a number of significant changes that includes the sale of most of its power generation capabilities (68 power plants) to 2 large energy companies, and it is also purchasing a retail energy company in California. The company had to develop a process for culling through nearly 26 TB of data to determine what data should remain with the company, or be provided to the buyers of their assets, within the legal constraints of the purchase agreement. In addition, the company needed a solution for finding confidential and employee sensitive data to prevent unauthorized dissemination of PII.

## Solution

Innovative Driven provided a comprehensive solution that included setting up our Governance suite of software and allowing Innovative Driven's proprietary Matter Collect tool to be used to collect email coming from over 700 custodians. First, by utilizing the Innovative Driven consulting team to develop the work flows, and then incorporating services such as ONE processing and ONE review, our client was able to address their needs to get ready for closing on the 3 significant transactions to the company.