

MAY 2026

Purposeful integration: the path to value realization

Rethinking integration

A multi-part series exploring integration as a strategic, cultural, and leadership discipline across all stages of organizational evolution.

In this series, we will explore the ongoing, essential work of bringing systems, people, and purposes together—not just post-merger, but at any point in the life of an evolving

Value realization through integration

Integrations are about strategies...not just synergies.

The search for synergies and economies of scale was once a primary transaction driver. In most cases today, back-office synergies and scale efficiencies are not sufficient to justify the cost of a transaction.

Today's transactions are driven by broader and more complex strategic objectives. The business case is built around a variety of objectives that articulate a vision of what could be.

These include:

- expanding geographic reach
- enhancing services
- driving patient growth
- restructuring delivery assets
- improving capabilities
- managing risk
- serving a community and mission
- improving the ability to capitalize on market scale

Turning those visions into reality and realizing the intended value of a transaction is the result of hard work, planning, and operational execution. It is the result of structured, purposeful, and value-focused integration.

Purposeful, structured, value-focused integration

Purposeful, structured, value-focused integration is the mechanism by which organizations achieve the business case and the intended results of a partnership, merger, or acquisition. Understanding the business case and structuring the integration around that business case and its objectives increases the likelihood that those objectives will be met. In practice, this means that integration planning needs to focus equally on driving strategic, operational, and financial value.

Integration planning needs to focus equally on driving strategic, operational, and financial value.

Figure 1. Why organizations integrate



This balanced emphasis must be embedded from the start—in the structure of the integration program itself, in the planning for how integration activities are prioritized and sequenced, and in how progress and impact are tracked and measured.

Integrating organizations must focus on four sources of value that tie back to the business case. In the short term, organizations need to focus on preserving and capturing the expected value of the transaction. In the longer-term, organizational focus can shift to realizing the more strategic value that it hopes to create and sustain into the future:

Figure 2. Four types of value



Realizing each of these four types of value requires a purposefully structured and proactive approach to integration—one that explicitly centers and organizes the effort around the strategic goals and rationale for the transaction.

The integration journey

Integration is a journey. It takes time.

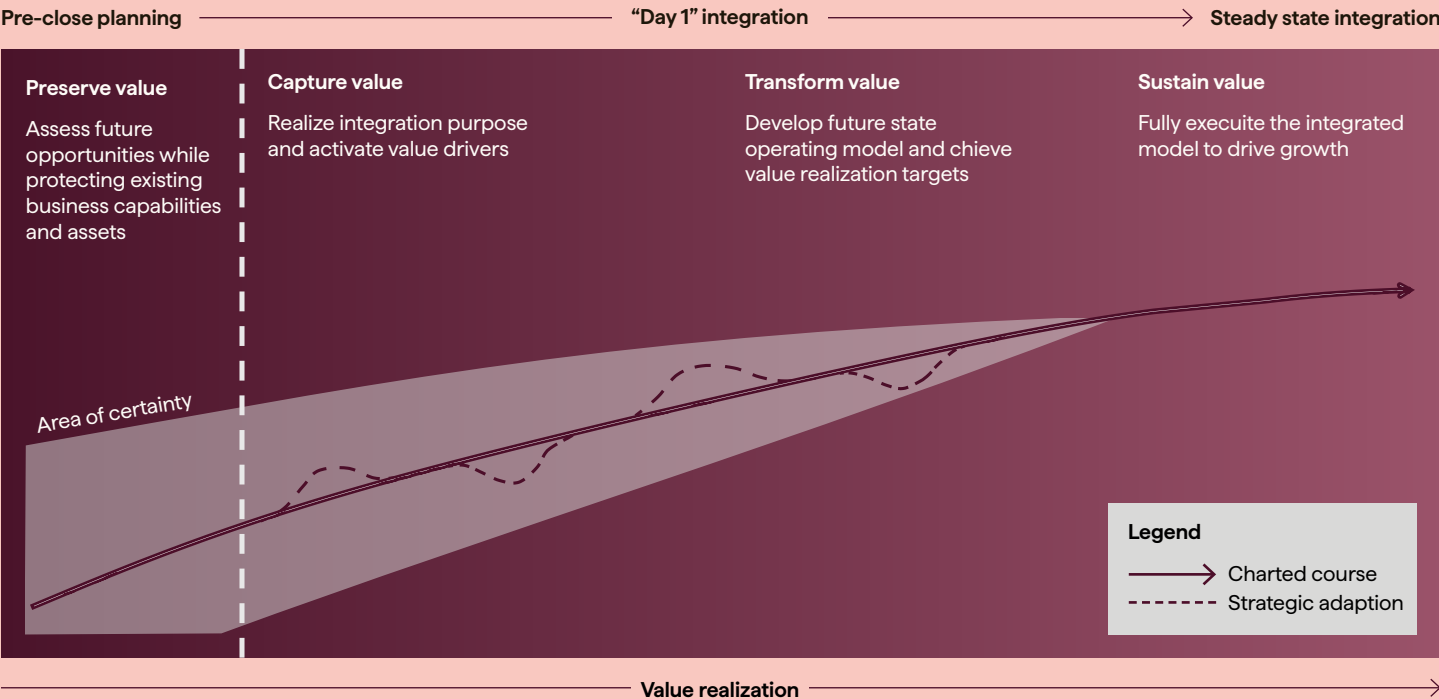
Effective integration planning requires looking beyond the short- term priorities of preserving value and capturing financial synergies and efficiencies. This often means structuring the integration to include both functional workstreams (finance, IT, care delivery, ancillary services, supply chain, etc.) and longer, more strategic workstreams focused on growth, capacity and access, new capabilities, services or programs, and quality improvement, which take longer to realize.

Sequencing this work matters. Initial stages of the integration focus on ensuring business continuity (“keeping the lights on”), achieving more straightforward synergies (preserving and capturing immediate value), and on laying the groundwork to enable future transformational and sustained value creation. At this stage, certain functions, like supply chain and purchased services, may yield faster returns and can often be prioritized early. Later stages focus on other functions which may take longer to bring together and need to be approached with a longer-term perspective to achieve the full integration and future state operating model.

Maintaining focus on value realization throughout this integration process—and aligning integration efforts with the value articulated in the business case—significantly increases the likelihood of achieving goals and fully realizing the collective benefits of the transaction.

Today’s transactions are driven by broader and more complex strategic objectives.

Figure 3. The path to value realization



Charting the course

To steer toward focus, accountability, and outcomes, it is critical to measure integration results against the transaction business case. Tracking actual performance against intent enables organizations to understand progress, stay aligned, and course-correct with intention.

This requires insight into where the organization begins, where it aims to go, and the metrics that define that journey—strategic, operational, and financial. It also requires a clear line of sight from the original rationale for the transaction to post-integration performance, and the discipline to measure that performance consistently.

With a clear destination and intended value in mind, organizations can plan integrations that achieve the intended value of their underlying transaction. Integration leaders are clear on their objectives and the outcomes they are working towards and have the tools and capability to measure their progress. Their efforts are structured around the operational and strategic priorities of the transaction, affording them visibility into the short and long-term priorities and waypoints along their journey.

With clear targets, aligned priorities, and ongoing tracking, leaders and the organization can coalesce around their objectives and achieve early wins, sustained progress, and long-term transformation.

Building a performance measurement model that tracks back to baseline

“You get what you measure,” as the old adage goes.

Often as organizations come together, they fold the acquired entity into regular operations and financial reporting, obscuring the ability to track results against a clean baseline. By building a model that tracks and reports performance against baseline and links to the organization’s broader financial plan, an organization can provide transparency, accountability, and a clear reckoning of whether business case objectives are being achieved.

Building this model requires understanding the strategic, financial, and operational objectives they are aiming to accomplish, including increases in volumes, improvements in clinical documentation, reductions in supply and labor costs, and impacts of downstream referrals. By identifying realistic goals across each of these key domains, operators have specific targets they can be held accountable to meet. These targets enable value capture and improve financial modeling for the next time the health system absorbs a new entity, both pre- and post-transaction.

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