CORSOURCE®

# ChillCo Gains Acquisition Confidence with Independent Technology Due Diligence

Transportation, Logistics & Distribution
Focus Tech Investment | Technology Investment Audit

**CorSource gives ChillCo the independent technology expertise and structured process to close acquisitions with confidence, eliminate unnecessary costs, and build a repeatable due diligence capability that scales with every deal.**

CHILLCO
COLD CHAIN LOGISTICS



## Executive Summary

ChillCo Logistics partners with owner-operated cold storage companies across the Midwest, offering a model that breaks from the industry norm of rolling up companies into large consolidators in favor of preserving their brands, retaining their teams, and providing the growth capital and operational support to help them thrive.

As ChillCo began executing its acquisition strategy, it quickly became clear that evaluating the technology environment of each new acquisition would be critical to protecting deal value and ensuring business continuity.

With limited relevant in-house IT expertise and recognizing it was not advisable to rely solely on the acquired company's existing managed service provider (MSP) or internal teams, ChillCo needed a trusted, independent partner to assess what they were inheriting, validate the transition plan, and give leadership the clarity to move forward with confidence.

ChillCo turned to CorSource for the independent technology due diligence that significantly reduces acquisition risk and gives leadership the clarity to move forward with confidence and no surprises or operational disruptions.

> *"For a company like ours that stays lean by design, having CorSource as our technology partner changes the equation. They bring the expertise we need, give us an independent view we can trust, and help us close acquisitions without a single business interruption. They are the technology thread through every deal we do."*
>
> — Jason Lafferty, CEO
> at ChillCo Logistics

### Heat Map Summary

| Tech Categories | Core | Diff | Base | Action Items |
|---|---|---|---|---|
| Network | | | | 1:1 A:1 B:1 |
| Servers, Storage (DC) | | | | 1:1 |
| Clients | | | | A:3 |
| Telephony | | | | 1:1 |
| Security Infrastructure | | | | 1:1 |
| Business Applications | | | | 2:1 3:3 A:3 B:2 |
| SW Licenses & Subscriptions | | | | B:1 |
| Cybersecurity | | | | |
| Security Policy & Governance | | | | A:3 B:1 |
| WMS Processes | | | | B:9 |
| ERP Processes | | | | A:1 B:1 |
| IT Operating Processes | | | | A:3 B:1 |
| Data Repositories | | | | A:2 B:1 |

1 Red: Prioritized Actions (1-3) A Yellow: Mid (A) to Long (B) Term Actions

Case Study

## Challenges and Objectives

ChillCo's growth strategy depends on acquiring and integrating owner-operated businesses efficiently and without disruption. With each new acquisition comes:

- A technology environment of unknown complexity
- Systems running on infrastructure the acquiring team has never seen
- Transition plans owned by vendors with their own interests

For a company built to stay lean, standing up a full internal IT function was never the answer. The real challenge was finding a way to get an honest, independent read on what they were taking on, without adding permanent overhead or compromising the speed and discipline that makes their model work.

## How CorSource Helps

CorSource conducts comprehensive technology assessments covering infrastructure, applications, data, and processes.

The work is structured around weekly checkpoints that keep ChillCo's leadership aligned as findings emerge, allowing the team to learn alongside the process and make informed decisions in real time.

Deliverables include:

- A full **technical audit**
- An executive summary with **prioritized recommendations**
- A **heat map** classifying capabilities as core, differentiated, or base
- A **risk mitigation plan** spanning infrastructure, software, data, and processes

CorSource independently validates the transition plan, giving ChillCo confidence that the path forward is sound before commitments are made.

The initial engagement evolved into an ongoing fractional CIO relationship. CorSource is ChillCo's first call for technology decisions, bringing institutional knowledge of the business into every new acquisition and helping build the foundation for rationalizing a shared technology stack across the growing portfolio of acquired companies.





> *"The first engagement resulted in us leveraging CorSource and their structured, repeatable four-week due diligence process which is now a standard practice with every acquisition we pursue."*
>
> — Jason Lafferty, CEO at ChillCo Logistics

## The Outcome and Benefits

ChillCo completes its acquisitions with full business continuity. The technology transition produces zero interruptions to operations. In the first engagement, a significant capital expenditure was avoided after CorSource identified that backup redundancy, rather than full hardware replacement, was the right path.

### Zero business interruptions

Fast and seamless operational transitions without system downtime, email outages, or access failures.

### Significant cost avoidance

Scrutiny over planned capital expenditure has resulted in more effective and less costly alternatives.

### Independent validation

An independent assessment and plan eliminate surprises and gives leadership confidence before committing.

### A repeatable playbook

A four-week due diligence process is now standard for every ChillCo acquisition, with CorSource as the consistent partner.



## Let's talk about what you're working on.

We help business and technology leaders navigate inflection points with expertise, leadership, and hands-on support to drive outcomes that stick.

CORSOURCE®

corsource.com | 503.726.4545