



Checklist

Post-merger integration readiness

Bringing two businesses together can be a great growth opportunity—but it also comes with some unique challenges. The steps you take leading up to and in the weeks immediately after a merger or acquisition are critical to realizing long-term success. This checklist details the basic elements of a post-merger integration as you prepare for your transaction.

1 Before your deal closes

- Set (and stay true to) your strategic focus**
 - Align the executive team on the objectives of the acquisition as well as the strategy and vision for the new company.
 - Identify a core team of leaders from both companies to lead the integration process.

- Plan how you'll integrate the teams**
 - Develop a high-level view of the integration strategy and blueprint to be pursued throughout the integration process.
 - Perform an in-depth review of each business function (i.e. sales, operations, accounting, etc.) to determine which parts of the businesses will be integrated, which parts will remain independent and which parts need to be reorganized or eliminated.
 - Identify all potential roadblocks by understanding the emotional, political and rational issues surrounding the integration.
 - Recognize any legislative constraints that could affect the integration process.
 - Identify tasks that need to be completed immediately and those that can be completed at a later date.
 - Determine if the services of a consulting company are required (to provide integration project management) or whether all integration activities will be conducted in-house.
 - Appoint an integration leader to oversee the integration process.

- Create your integration plan**
 - Prioritize activities to be completed, establish short-and long-term goals, create a timeline for the integration process and a detailed integration plan for all activities and/or functions.
 - Obtain human, financial, and organizational resources for the integration process and assign accountability for implementation.
 - Establish key metrics across critical stages and track milestones achievement over time.

 - Develop a communication plan**
 - Create external and internal communication plans with clear timelines to inform stakeholders about what is happening.
 - Make sure both plans emphasize critical day one communication and be ready to implement brand changes on day one.
 - Appoint a single point person (preferably the integration leader) to serve as the "mouthpiece" for the communication of integration information.
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2 After your deal closes

- Create a clear day one handover plan**
 - Move quickly to make sure you retain top talent and key customers: both are critical to ongoing success.
 - Ensure the day one team (especially senior management) is mobilised, briefed and ready, and that contingencies are in place in case of any unexpected absences.
 - Document day one governance and ground rules. This preparation work will minimize potential confusion around any immediate changes to signoffs for expenditure and lines of reporting.
 - Be ready to deploy day one decisions on corporate image (i.e.: branding, logos, email addresses, websites, and use of business names).
 - Identify critical staff who may be at risk of leaving and plan to meet with them early to settle them down.

- Lead from the front**
 - Make sure directors, CEOs and other senior executives are actively and visibly involved with the integration.
 - Schedule time to meet with affected staff and hear their concerns.
 - Create “quick-wins” that will satisfy your teams, customers and investors: they’ll be looking for early signs of success.

- Engage people at all levels**
 - Get buy-in on merger-related changes by involving staff in consultations, brainstorming and implementation.
 - Create joint teams with managers and staff from both companies to support the integration team.

- Keep communications flowing**
 - Make sure employees are kept up to date on how the integration is going and on its expected outcomes and benefits. Announce key decisions as soon as possible.
 - Ensure customer-facing staff and all marketing materials project a clear and confident image of the new company.

- Do a 100-day check**
 - Ensure that, by the end of the first 100 days after the merger, the new business lines, functions and departments are taking on increasing responsibilities.
 - Ensure the new corporate image is clear to stakeholders.

Get expert help

Do you have a clear understanding on how to move forward with an integration? Our experts can help ensure you secure the most value from your merger or acquisition. Reduce your operational risk and implement the best practices to manage your integration.

→ [Contact us to learn more](#)

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