

7 Essential Strategies to Ensure a Successful Handoff from Due Diligence to Integration



**Ben Roethlisberger, Pittsburgh Steelers,
fumbles on the goal line**

1. Redefine governance roles
2. Map the process
3. Game Day: Provide immediate directional guidance on major issues
4. Maximize pre-close integration planning
5. Use “clean-teams” to accelerate synergy capture and manage sensitive data pre-close
6. Master the art of integration launch
7. Find the “secret sauce”
– business model & culture

1. Redefine governance roles (examples)

- **M&A core team with cross-functional senior level experts**
 - First pass targeting, diligence and integration through critical phases
 - Dedicated full time or ad hoc members of corp dev
- **Each deal led by the receiving business unit “executive sponsor”**
 - Continuity from start-to-finish / ultimate accountability and support
- **Expand Corp Dev “deal champion” role**
 - Owns the hand-off via coordinated process
 - Works with Integration Lead to draft integration team charters with specific risks / issues / assignments
- **“Integration Leader” and IMO involved throughout diligence effort**
- **Align and coordinate external advisors**
 - Fully embedded partners; oriented in advance to your process
 - Coordinate methodologies to minimize redundancy
- **Performance incentives based on overall business results vs. transactions only**

