Culture assessment during the deal cycle: A range of options to collect / analyze data

Informal Assessments → **Formal Assessments**

Initial Strategic Consideration

- Initial public data search
- Inside trade knowledge of target
- Third party strategic due diligence
- Initial "red flag" discussions with target executives / deal team

Due Diligence

- Culture data review
- Structured interviews with target executives / deal team / managers / others
- Initial limited surveys of individuals "in the know" or others as access permits

Pre-Integration Planning

- Quantitative culture assessment tool
- Validation sessions with executives and task forces
- Census or sampling surveys, reporting and analysis
- Strategic definition sessions with combined exec's
- Task force analysis and planning

Post-closing Integration & Implementation

- Communication and feedback
- Culture data used in planning and implementation decisions
- Additional group / sub-unit surveys
- Periodic re-survey's for progress measurement

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