



Rapid Assessment: Managing for Maximum Synergies

Completing the following scorecard will provide a quick, high-level view of how well prepared your organization is to handle several of the most essential aspects of effective synergy management.

Steps to complete the assessment:

- Rate each item on a scale of 0 (poor) to 10 (excellent).
- Make notes for each item to explain the rationale for the numerical rating.
- Add all ten scores to get a TOTAL SCORE (maximum score = 100).
- Identify priority improvements to address and strengths to leverage.

Answer each question below considering your current approach, typical results and outcomes.

“Our approach for managing and achieving deal synergies includes the following elements:”

Questions to Consider:	Score (0 – 10)
1. ... We maintain a historical database of prior synergy projects / outcomes to support future synergy identification, modelling assumptions and realistic requirements.	
2. ... We place a high-priority focus on validating synergy opportunities and other key value drivers during each due diligence.	
3. ... We engage appropriate acquired company leaders in evaluating and validating synergy opportunities at the earliest possible point in the transaction or integration lifecycle.	
4. ... We risk-weight or discount potential synergies that rely primarily on new or non-core business opportunities, new customer adoption, new sales skills or methods or other similar risks.	
5. ... We model negative synergies that should reasonably be included in our economic model, integration plan and overall timeline objectives.	
6. ... We use cross-functional teams to validate potential synergies / synergy project plans to ensure accuracy and confirm all dependency issues are established and understood.	
7. ... We use a governance model for synergy projects that includes principal accountability at the Executive Sponsor level, while principal responsibility for achievement rests at the Integration Leader and Function-Head roles most directly relevant for each project.	
8. ... We use a synergy project team or value-driver team on key projects, with a designated owner, approved project plan, accountabilities and rewards.	
9. ... We make every attempt to accelerate synergy capture in priority-based phases, beginning with immediate synergies available beginning at deal closing.	
10. ... We use a robust and disciplined process for executing, tracking and reporting-out on synergy projects, status and results.	
Total Score (Maximum = 100)	