

M&A Integration

Top Ten Breakthrough Practices

What breakthrough practices or lessons learned, if any, have enabled your company to be more consistently successful at integration?

Ranking	Topic	Sample Responses
1	Resources	“Development of the IMO and assigned PMs has made a huge positive impact”; “a core full-time integration team with 50-100% dedicated partners in every functional area”
2	Integration Framework and Process	“Development of a more robust M&A process with clear definition of roles and responsibilities and deliverables”; “streamlined, disciplined, structured approach with 6 phases that is tightly interwoven with the Business Development group”
3	Governance/ Leadership	“Establish strong governance”; “dedicated leaders”; “ensure that executive sponsors of the deal are fully engaged throughout the process”; “executive steering committee”
4	Integration Planning	“Start integration planning during due diligence”; “include IT and HR early in the planning process”; “establish a 100-day plan with specific tasks to be completed”
5	Integration Support Tools	“Developing an M&A Playbook”; “using project management tools”

Source: M&A Partners | The State of M&A Integration Effectiveness™ Survey 2014

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6	Communication and Change Management	“Communication of all goals and objectives to all stakeholders prior to closing”; “over-communicate with new employees”; “adopting a Change Management framework”
7	Business Model/ Value Drivers	“Doing our homework on the companies being merged”; “understand the value proposition before deciding on the integration plan”
8	Acquired Employee Experience/ Onboarding	“Detailed planning for integrating new employees”; “dedicated HR team for M&A activities to help ensure a better employee experience”
9	Speed, Focus and Accountability	“Increase integration speed and focus to harness expected synergies”; “deal accountability”; “faster IT conversion to our platforms”; “increased focus”
10	Lessons Learned/ After Action Reviews	“Action Reviews to learn from previous acquisitions and improve the next ones”; “Center of Excellence to drive consistency into the process and institutionalize best practices”

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