

M&A INTEGRATION

	Pre-Deal	Pre-Signing Due Diligence	Signing	Post-Signing Due Diligence	Closing Day 0	Days 1 - 30	Reflection	Days 31 - 90	Reflection	Days 91 - 180	Reflection	Days 181 - 360	Reflection	Months 12 - 18	Months 18+	Reflection		
UNDERSTANDING CONTEXT	Strategic Inquiry with the BD/Leadership Team (clearly understand and articulate business strategy, deal purpose, synergy targets, environmental constraints, as-is and to-be states for the combined organization)		Strategic Inquiry with Stakeholders (1)		Strategic Inquiry with Stakeholders (2) - Team Assessments (clearly understand the as-is and to-be states for the combining organizations; actively engage employees at various levels and/or as teams, in identifying strengths and opportunities to facilitate positive, effective, efficient and sustainable integration outcomes)													
			Organizational Network Analysis - Influence (understand mechanisms of influence in the organization which can be optimized to improve communication, leadership and integration outcomes)				Organizational Culture/Values Assessment (use pre-existing and/or new data and artifacts to understand and articulate the as-is and desired culture/values of the emerging organization)											
TALENT ASSESSMENT	Determination of Differentiated Positions and Critical Roles (understand the positions/roles in the combined organization with the greatest impact on current and future success. Role differentiation is a function of connection with the business strategy and aids in designing organization structure and aligning talent)		Assessment of Talent (continued) (using a specially selected protocol, conduct targeted talent assessments to discover aspects of talent which are easily seen (surface-level) and which are difficult to see and critical to individual and organizational success (deep-level))															
					Assessment of Talent (Leaders and Critical Roles)													
TALENT ALIGNMENT	Alignment of Talent and Business Strategy (bringing together business strategy, critical positions, deal objectives, and a comprehensive assessment of your talent capabilities, design your short-, medium- and long-term organization structure)		Organization Design/Talent Alignment (Phase 1)		Talent Alignment (Phase 2)		Talent Alignment (Phase 3)											
			Develop Talent Retention Strategies (using talent differentiation, talent assessment, strategic inquiry and deal-related information, create a compelling and meaningful employee retention program to incent critical talent to remain with the organization)															
			Develop Talent Transition Strategies (in partnership with your legal counsel, develop transition strategies to transition talent from the combined organization—aligned with business strategy and rigorous inquiry, this effort ensures fair treatment to employees and reduces organizational risk)															
			Develop Culture and Engagement Strategies Employee On-Boarding		Refine/Revise Culture and Engagement Strategies													
TALENT EVOLUTION					Deploy Talent Retention Strategies													
					Deploy Talent Transition Strategies													
					Deploy Employee On-Boarding and Cultural Alignment Strategies													
COMMUNICATION - INTERNAL AND EXTERNAL							Talent Development											
					Refine and Deploy On-Going Culture and Engagement Strategies													
PEOPLE-RELATED TACTICAL DUE DILIGENCE AND INTEGRATION																	Comprehensive People-Focused Communication Efforts	
INTEGRATION PMO COLLABORATION																	Human Resources - Tactical Due Diligence (Employment Policies, Total Rewards/Employee Benefits, Payroll, HR Technology Harmonization, Organization Charts, etc.)	
																	Alignment with Integration Project Management Office/Team	