HOW TO SET UP YOUR INTEGRATION TEAM FOR SUCCESS

INTRODUCTION

A team can make or break a company's success, so attention to both teams' ability to adapt and merge together post-close is imperative. In this ebook, we will provide you with some ways to guide your team and set them up for future achievements.

Post-integration should be considered throughout the development to ensure you are fruitful going forward. Recognition of common failures will also aid in identifying issues early on to pivot quickly. The integration process can provide an excellent opportunity to assess the team, current operations, and the product in order to shift and be more prosperous going forward.

Plan

— Begin by assessing a step-by-step plan to align members for the entire process and post-integration. A successful design will incorporate mapping out priorities, transparent forms of communication, consistent articulation of goals and individual responsibilities, and both short-term and long-term operational achievements. A well-mapped out strategy that is communicated by leadership will help to align team members and hopefully achieve synergy.

Leadership

— It is essential for leaders to strategically guide their team through integration with precise objectives to create post-integration success, so invest in leaders. A well-commu- nicated strategy by leadership will make everyone on the team feel invested in the future of the company. Leaders will need to establish evident markers for team members to build buy-in from members and make the transition easier since everyone will have a shared understanding.

- **Guide:**

  Support leaders who guide and encourage their team members to collaborate both during and after integration. Throughout integration, leaders who continue to be involved and guide members can make sure all team members are aligned. Leaders need to express a clear plan and communicate to team members to guarantee momentum. Progress can take a long time, and it can be easy to lose sight of the goals. Good leadership that articulates the objectives and engages with employees to verify they know long-term goals and day-to-day operations creates an effective team going forward.

- **Model:**

  Encourage leaders to serve as a model. Leadership can serve as role models for other team members. Key stakeholders and leaders who are agile and meet people where they are at, create a sense of community. Leaders who are flexible are also more approachable for questions and concerns.

Communicate

— Ensure leadership is communicating to all constituents.

- **Internal:**

  It is imperative that leaders communicate throughout the process with regular updates to align the team and create buy-in. If team members aregiven the same information, it can prevent quarrels, miscommunication, and disenchantment. Examine both teams' communication structures and strategize how to prepare a transition in communication forms going forward or even a method to blend those systems. Clear internal communication will make it easier to relay information to the team.

- **External:**

  You need to communicate not only with your team, but also with your customers and key stakeholders. External communication provides an easier transition for your team as they are able to better answer questions posed to them. Find ways to engage them and reassure them, because post-integration could be derailed by customers complaining about the change or even a sudden flux in customers leaving if they don't feel connected. A company's success is determined by their ability to be prosperous financially, and if you lose large swaths of customers that could be disastrous, so carefully consider how you let your stakeholders know about the change.

Due Diligence

- **Proper due diligence:**

  Examine not only financials, but operations, because operations are essential to financial success. Consider how operations will shift or meld together going forward. By examining operations, you can not only find new cost-cutting measures or ways to stream-line procedures, but also discover new possibilities that will strengthen the company going forward. New developments can give members of the team a sense of accomplishment that they built something together and propel momentum.

- **Re-evaluate:**

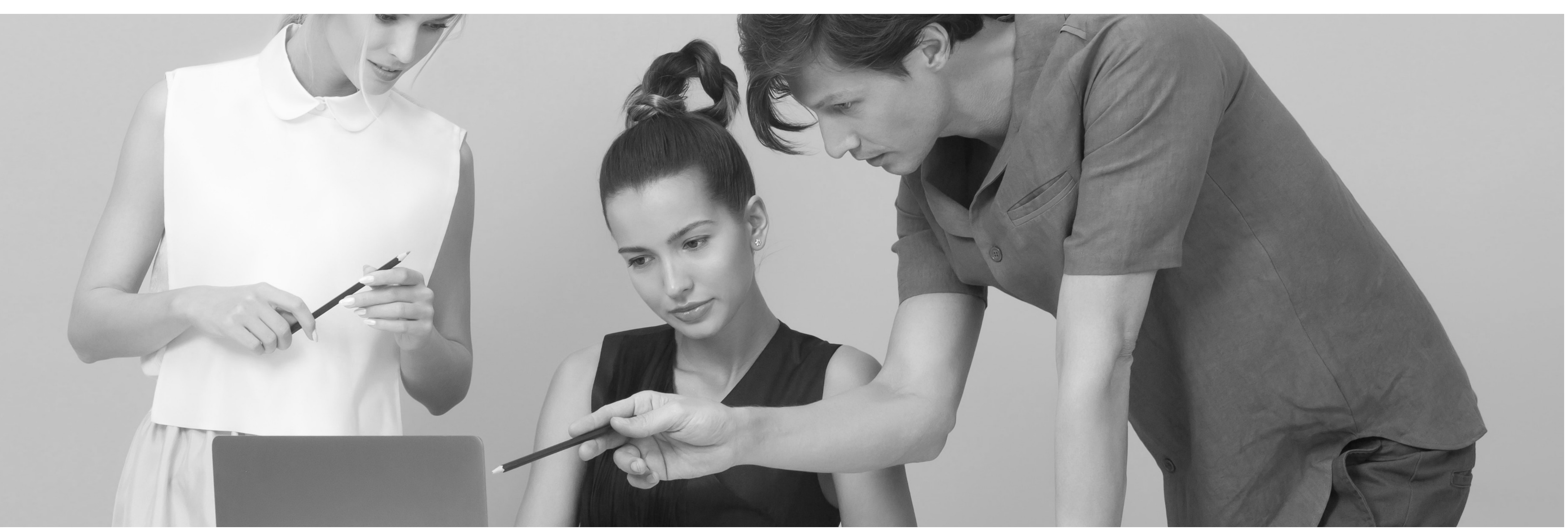
  As you examine both companies for integration, there needs to be continual assessment and re-evaluation. As team members change, cultural shifts occur, and the overarching climate evolves, new issues or accomplishments can emerge. An assessment will bring attention to those shifts and new ways you may need to pivot. Due diligence can also serve a discovery process that can lend attention to red flags that might make synergies impossible.

Operations

- Consider both teams' operations and how to either merge them or build something new. Examine sales, products, pricing, branding, and how each of these elements is currently and will be carried out. After understanding the different operations, communicate clearly a plan that articulates how operations will stay the same, change, or merge together.

- **Train:**

  Generate company systems that will either train new users or establish a plan to blend these operational elements. Both during and after integration ensure that everyone is aware of operational changes and is properly trained. Training can foster a shared experience for employees and an opportunity for them to get to know one another and learn from one another, which can aid in forming new relationships with one another.



Technology

A specific operational area to assess is technology. Different platforms and systems can prevent team members from successfully achieving synergies.

- **Internal Communication:**

  Technology can impact the accomplishments of a team informally through differing forms of communication. If a team utilizes email to communicate memos, plans, and even social events, but the new team incorporates a variety of platforms, such as an inter-office messenger system and texting, the different teams may struggle with understanding the way to communicate with one another. The two teams could even become frustrated if they prefer more formal or informal means of communication. A plan to address formal and informal technology systems can aid in shaping a collective company culture that aligns the members.

- **Systems:**

  As you go through the integration process consider the use of technology and different platforms both informally and formally. Pay attention to the way technological systems can meld with one another, ways to shift and train if systems are not compatible, and methods of communication. Examine the ways technology is embedded in company culture to ensure that workflows continus to be productive and data can be shared. Time and attention considering technological systems, procedures, and platforms for sharing and disseminating information will aid in melding together different team members. Platforms that share information may not be compatible, so it can lead to tension within a team as they encounter challenges with adjusting to a new situation or trying to gather data from the previous platform.

Human-centered

— Shift the focus to human investment and talents. Products, operations, and needs will change, but the team will lead to financial success. A foundation of the process and transparent communication from leadership will provide an understanding of the path forward and allow members to be aligned. Check-in with team members throughout integration and emphasize the team working together to develop cohesion and a shared vision. Consider governance once both companies have merged, and then plan to execute the transition going forward, as well as long term, to achieve the your desired synergies.

- **Culture:**

  Examine cultural areas that might be in competition with one other, areas that could blend together, or aspects that would be a great contribution to one another. Pay attention to differences and strategize how to align company cultures. Company cultures do not have to be the same to effectively connect, but attention to the possibilities that they can go together is beneficial. Additionally, recognition of drastically different cultures that cannot merge is also important, because it is better to walk away than to set-up the companies for failure.

- **Learn:**

  Commit to and encourage a learning culture. Team members who are supported in investing themselves and their careers long-term will prevent costly turnovers and scrambling for employees that are not properly trained. Emphasize professional development within the company as an investment. As team members develop and learn together, it will form a shared vision.

- **Compensation:**

  Consider current forms of recognition, compensation, and rewards. Both teams may have different methods of recognition, compensation, and rewards and may be surprised when they no longer receive them. Establish a plan that acknowledges the way both teams previously operated and what aspects of recognition, compensation, and rewards will be utilized to generate a shared understanding of a new company culture. Additionally, this establishes well-defined indicators for individuals on ways to grow and succeed in the company. Finally, consider recognition, compensation, and rewards as part of the integration process to assist and encourage team members as they go through change, while recognizing that an investment in team members is ultimately an investment in the company.

Reframe

— As you communicate with team members, reframe the perceptions of integration. Emphasize that the integration process and the teams coming together is an opportunity to learn and grow professionally and personally within the company. High-light and foster a culture to employees that allows them to see themselves as a part of the company's progression for long-term success and that they are embedded in that creation.

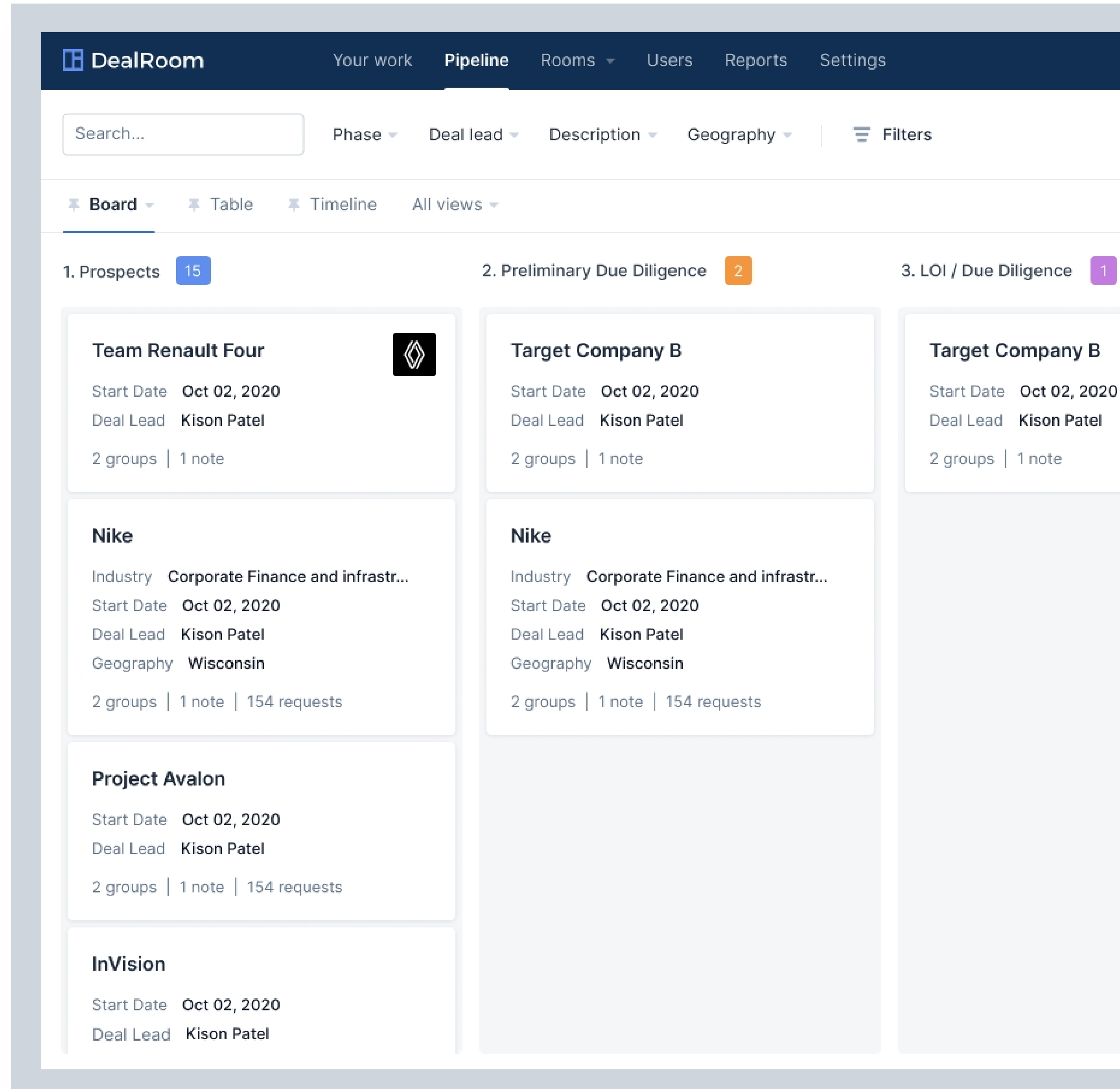
Closing

A company's achievements are contingent on the members of the team. If a product or platform is outstanding, but there is no one to support the vision and make it happen, it will fail. We have outlined a few ways you can set-up your team members for success and invest in the company's accomplishments long-term. Integration is a great way to begin to reimagine both companies to be even better. Team members who receive clear direction, have the proper training and tools, and are considered throughout the company's development, will be better prepared for post-integration.

DEALROOM.NET

DealRoom for Integration Management

Take control of your pipeline. Manage diligence and integration in one worfklow.



Learn more about how Dealroom can improve your integration management today.

Learn More