



The actions taken during the first 100 days after the deal is announced can determine whether or not the desired results are achieved.

## First 100 Days – Planning Workshops

Ideally, the post merger integration plan will be developed prior to deal closing, but from a practical matter, this process may not begin in earnest until after closing due to confidentiality or regulatory concerns. The post merger integration plans must identify actions to be taken during the first 100 days after the deal is announced.

**The M&A closing dinner just wrapped up and everybody can just get back to normal work... right?  
WRONG.**

Integration activities during this time frame should be prioritized considering the deal value drivers, the level of integration required and some "quick wins". A series of joint workshops are held with functional department members of both organizations to:

- Relay the key value drivers that will determine deal success
- Determine the level of integration that can be accomplished in 100 days
- Set key milestones for tracking and controlling
- Develop milestones, plans, schedules, responsibilities, and deliverables
- Define and sequence the phases and activities to achieve milestones
- Determine and build in dependency relationships between workstreams
- Identify early wins to motivate the organization and to help quiet the skeptics

### **M&A Integration Checklist 500™**

This checklist has been developed from involvement in a number of transactions, as well as information assembled from a variety of public sources. Of course, all of the tasks may not be applicable to a specific situation, depending on if the transaction is a stock purchase, asset purchase, private company, public company, etc.

To assure that no critical post-merger integration tasks are overlooked, our professionals will review each activity on our comprehensive checklist of over 500 tasks with the team members to assist in developing detailed action plans and schedules.

***In today's market, rather than easing into the integration process, the time frame must be compressed before the synergies of the deal disappear... Speed is of the essence, as noted in a recent M&A survey where 80% of executives said speeding up the integration process was one of the primary things they would have done differently.***

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