Integration Checklist 500™

Our Post Merger Integration Checklist has been developed from involvement in a number of transactions, as well as information assembled from a variety of sources and other subject matter experts. Of course, all of the tasks will 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 with your team members to assist in developing your detailed action item plan and schedule. As always, the task list will be tailored to your specific requirements.

It takes a considerable time investment to develop an integration task listing. Our Post Merger Integration Checklist, drawn from numerous transactions, highlights the key elements in the M&A integration process.

> **Our Integration Checklist 500™**
> **contains over 500 tasks**

Organized by Functional Area

Many integration tasks can seem simple when thinking of them off-hand, but in order to maintain a cohesive body with balanced progress across the board, detailed planning is a must. Companies that have not planned ahead, utilizing experienced knowledge, often run into unforeseen obstacles along the way, costing them time and money. For most integrations, these plans will be organized primarily by function, with tasks broken out by departmental or functional area:

- Executive Management
- Finance
- Human Resources
- Property/Facilities
- Accounting
- Operations

- Services
- Information Technology
- Marketing/Sales
- Supply Chain
- Legal
- Insurance

Post merger integrations involve hundreds of individual tasks and action items. Completing these tasks are important drivers in determining the overall success of an acquisition transaction.

Atlanta - Boston - Chicago
Dallas - Detroit - Houston
Los Angeles - Miami
New York - Philadelphia
Phoenix - San Francisco