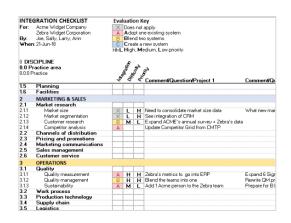


## INTEGRATION CHECKLIST

We used the Integration Checklist to plan and manage the consolidation of four non-profits. While at first, our boards and funding sources were surprised to learn all the work needed to integrate, they ultimately appreciated—and supported—this critical work. Marcia Hendrickson, CEO, NewBridge

# Introduction

Use **The Integration Checklist** *before* an acquisition, merger or consolidation to identify gaps, overlaps, differences and similarities among systems, processes and staffing. Integrations don't have to be chaotic, tense or distracting. The Integration Checklist will provide everyone a realistic—and rewarding—set of collaborative projects to achieve the big goals of the new entity.



### **Benefits**

The Center's tools minimize omissions, improve communications and foster collaboration. The **Integration Checklist**, when used with The GM's Index of Terms:

- Realizes the promised economies and opportunities of the integration
- Manages the additional workload during the integration
- Helps managers from the entities learn how each they talk and think about things

Difficulty Difficult

Estimated time required 4 or 5 2-hour meetings

Special skills None

### **Basic Instructions to the Team**

The critical questions when integrating organization are, Whose system or policy is going to be used for the new entity? Is a new system needed? What steps come first?

- 1. Put an "X" by the terms that don't apply.
- 2. See the Key to record decisions about system use, complexity and urgency.
- 3. Use the Three Good Questions at each term to explore the issue further.
- 4. Record important questions, assumptions and recommendations.
- 5. Run through the list again to confirm which integration projects come first.

Members can contact the Center for assistance: info@theindex.net

### Make It Better

Member should share ideas for improving any of the Center's tools and how they're taught and formatted. It's also great to suggest new applications or brand-new tools.

### INTEGRATION CHECKLIST

Acme Widget Company Zebra Widget Corporation

Joe, Sally, Larry, Ann When: 21-Jun-18

### **Evaluation Key**

X Does not apply
A Adopt one existing system
B Blend two systems
C Create a new system
HML High, Medium, Low priority

0 DISCIPLINE 0.0 Practice area 0.0.0 Practice

Comment/Question/Project 1

Comment/Question/Project 2

		'n	ď	Q`	Comment/Question/Project 1	Comment/Question/Project 2
1	STRUCTURE					
1.1	Ethics and the law					
1.1.1	Business ethics	Α	L	М	Use Acme's Code of Ethics	Revise orientation program
1.1.2	Intellectual property	С	Н	Н	Create a catalog of all IP	
1.1.3	Dispute resolution	Χ				
1.1.4	Antitrust	Х				
1.1.5	Compliance	Α	М	L	Use Zebra's compliance protocol	
1.1.6	Contracts	Α	L	М	Use Acme's standard widget contract	Adopt Zebra's Terms of Use
1.2	Market position					·
1.3	Ownership structure					
1.5	Governance					
1.5	Planning					
1.6	Facilities					
2	MARKETING & SALES			•		
2.1	Market research					
2.1.1	Market size	Х	L	н	Need to consolidate market size data	What new markets can we conslider?
2.1.2	Market segmentation	X	L	н	See integration of CRM	what new markets can we consider:
2.1.3	Customer research	В	М	L	Expand ACME's annual survey + Zebra's data	
2.1.3	Competitor analysis	A		-	Update Competitor Grid from CMTP	
2.2	Channels of distribution				opuate competitor and from civity	
2.3	Pricing and promotions					
2.4	Marketing communications					
2.5	Sales management					
2.6	Customer service					
3	OPERATIONS					
3.1	Quality					5 160 1 1
3.1.1	Quality measurement	Α	Н .:		Zebra's metrics to go into ERP	Expand 6 Sigma training
3.1.2	Quality management	В	Н	Н	Blend the teams into one	Rewrite QM protocols
3.1.3	Sustainability	Α	М	L	Add 1 Acme person to the Zebra team	Prepare for B Lab recertification
3.2	Work process					
3.3	Production technology					
3.4	Supply chain					
3.5	Logistics					
3.6	Inventory					
4	INFORMATION					
4.1	Applications					
4.2	Internet					
4.3	Data and reporting					
4.3.1	Database design	E	Α	М		
4.3.2	Database integration	Α	Α	М		
4.3.3	Reporting	N	Α	Н		
4.3.4	Information security	E	Е	L		
4.4	Research and analysis					
4.5	Communication System					
4.6	Information Technology					
5	HUMAN RESOURCES					
5.1	Management					
5.2	Organizational Structure					
5.2.1	Organization design	С	Н	Н	Publish new org chart with details	Create robust communications program
5.2.2	Teamwork	Α	М		Expand Zebra's soft skills training program	Create mixed teams for integration projects
5.2.3	Corporate culture	С	Н	Н	Review both culture assessments	Articulate ideal culture
5.2.4	Job descriptions	В	М	М	Link to new org chart	Take best from both firms
5.3	Employee Relations					
5.4	Training and Development					
5.5	Compensation					
5.6	Recruitment and Retention					
6	FINANCE					
6.1	Financial accounting					
•	Financial statements	۸	М	Н	Acmais system will be used for new entity	Need to map Zebra's chart of accounts
6.1.1 6.1.2	Financial statements Financial audit	A	L		Acme's system will be used for new entity Audit not needed for 2 years	Need to map Zebra's chart or accounts
		A				Use Acme's payroll system
6.1.3	Accounts payable Accounts receivable		M	_	Part of Acme's system Part of Acme's system	
6.1.4		Α	L	Н	rait of Actine's system	Address aging issues ASAP
6.2	Managerial accounting					
6.3	Budgeting and forecasting					
6.4	Financing					
6.5	Cash management					
6.6	Risk management					

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