Change Management
Post Merger Integration Plan
Charter – Change Management and Employee Engagement Team

**Mission**

- Develop a comprehensive change management plan that identifies what is changing and what is not as a result of the merger.
- Design and deploy mechanisms to help employees understand the required changes and take personal responsibility for successfully implementing them.
- Prioritize activities in the change management plan by creating HR Plans for Day 1, first 100 days, first six months, and first year post-close.
- Develop mechanisms to help employees understand and embrace the mission-critical cultural attributes that will define integration and business success within their part of the combined organization.
- Help people make sense of the changes so that they choose to align, engage, and commit their energy and passion to helping the combined organization achieve its integration goals and meet its full business potential.
- Create feedback loops to ensure the organization receives continuous input on what’s working and what’s not throughout the transition period.

**Deliverables**

- Comprehensive change management plan describing what’s changing and what’s not for Day 1, First 100 Days, First Six Months, and First Year post-close.
- Identification of mission-critical cultural imperatives that must be preserved or initiated to ensure the success and sustainability of the change.
- Employee Engagement Initiatives, including:
  - Managing through Uncertainty Workshops
  - Joint Intranet site for merger FAQs and announcements
  - Day 1 Welcome Celebration and Gifting
  - Site Visits by Executives shortly after Close
  - Employee Orientation
  - Town Hall Meetings
  - Employee Surveys to evaluate onboarding, integration, and launch
  - Appreciative Inquiry (AI) initiatives, as appropriate.
- Feedback loops to assess what’s working and what’s not.

**Interdependencies/ Coordination/ Collaboration Required**

- Executives in charge of each business unit to ensure alignment.
- HR teams to ensure all people-related issues are addressed.
- Communication team to ensure consistency of messages.
- Corporate to ensure alignment with vision/values.

**In Scope**

- All target’s business units.
- All employees.

**Hot topics/urgent issues to be solved**

- Key decisions by executives regarding what’s changing/what’s not on Day 1 & beyond.
- Synchronization of HR activities across all business segments.
- Clarity around who’s doing what for all Day 1 HR requirements.
- Organizational design/staffing decisions within New Division.
- Availability of Executives to participate in employee engagement initiatives.
- Ensure zero redundancy with Communication Team activities.

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Change Management Plan and Employee Engagement Overview

**1. Charter Team, determine what's changing, and develop change plans**
- Identify team members
- Create team charter and key deliverables
- Launch team
- Formulate key decisions list for New Division
- Analyze what's changing and what's not
- Develop HR Plans for:
  - Day 1
  - First 100 Days
  - First Six Months
  - First Year

**2. Design celebrations, surveys, training, communication, and feedback loops**
- Conduct Managing Through Uncertainty Workshops
- Launch joint intranet site for FAQs and announcements
- Plan/conduct Day 1 Welcome Celebration and gifts
- Schedule site visits Executives shortly after Close
- Conduct Employee Orientation sessions
- Administer 100-Day employee survey to gauge understanding and alignment
- Hold Town Hall Meetings with employees six months post-close
- Administer 1-Year employee survey to gauge success of integration / new division launch

**3. Capture lessons And document best practices**
- Discuss lessons learned and what can be done differently going forward
- Codify learning for future benefit
- Document and share best practices across businesses to benefit the entire enterprise
- Celebrate team successes

**Key deliverables**

**Change Management**
- Identify team members
- Create team charter and key deliverables
- Launch team
- Formulate key decisions list for New Division

**Employee Engagement**
- Conduct Managing Through Uncertainty Workshops
- Launch joint intranet site for FAQs and announcements
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**Lessons Learned, Best Practices**
- Discuss lessons learned and what can be done differently going forward
- Codify learning for future benefit
- Document and share best practices across businesses to benefit the entire enterprise
- Celebrate team successes
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