

# TOP ~~10~~ 20 CONSIDERATIONS FOR AN HR LEADER FACING AN ACQUISITION

If your organization is embarking on a merger or acquisition, the impact may be significant to both the legacy and acquired organizations. Successful integration will require careful planning and the right resources. Using our experience in supporting clients through acquisitions, we developed this checklist to help HR leaders start the process by asking the right questions.

	What you need to know	Examples	HR area
1	Who will be the core team responsible for ensuring a successful acquisition?	HR experts, communications group, IT	Project Management
2	How will the project team be held accountable for completing tasks on time to keep pace with the business transaction date?	Project manager, weekly updates	Project Management
3	What data do you need to gather to make good decisions through this process?	Payroll information, HRIS files, healthcare claims	Technology
4	What technology tools will need to be integrated?	Payroll, LMS, recruitment sites, perf. mgt. systems	Technology
5	What talent must be retained to ensure the acquisition process can be successful?	Key leaders, technical experts, change agents	Talent
6	What is your strategy for total compensation package in the combined organization?	Integrate or allow separate programs	Total Compensation
7	What functions may be duplicative once the organization is acquired?	HR, marketing, IT	Organization Structure
8	What communication channels can be used to deliver last-minute decisions and action steps to affected employees?	Restricted website, leader speaking points, Q & A	Change Management
9	What cultural issues exist in either group that could create challenges?	New leaders, communication style, geographic location	Change Management
10	What audiences need to receive special communications about the acquisition?	Leaders, unions, community members, government	Change Management

We wanted to do a **Top 10** List but there was just too much to consider... (next page)

# MORE QUESTIONS THAT NEED ANSWERS

What you need to know	HR area
11 What are the payroll considerations to ensure that employee pay is current as of the closing (including overtime and expense reimbursement)? If a severance or completion bonus is planned, what steps are needed to pay this money?	Payroll
12 What do benefit contracts specify as consequences for adding participants? How will employees on disability be handled under these contracts?	Benefits
13 Can your benefit administrators handle the increased level of participants?	Benefits
14 How are you going to communicate with other functions that play a role in the acquisition process?	Project Management
15 How long does the project team remain responsible for integration activities or support after the official transaction date?	Project Management
16 What activities need to occur (and what is the timeline for those activities) to transition any bargaining unit employees?	Change Management
17 What HR policies and processes need to be revised to ensure successful integration?	Change Management
18 What is the process for replacing employees that leave the acquisition target during the acquisition process?	Talent Acquisition
19 What workforce training requirements (such as mandatory safety training) need to be maintained during and after the transition?	Training and Development
20 What rewards and recognition programs need to be addressed based on new financial expectations for either organization?	Total Compensation