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## Acquisition Integration

### Case Study



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### Situation

A U.S. based, multinational company was negotiating the purchase of a business that would double the size of one of its operating divisions. Once integrated into the company, the acquisition target would deliver economies of scale and create a more dynamic division, delivering a broader reach into new markets. Senior leadership was concerned about the social-psychological aspects of the integration process that could adversely affect ROI.

Key issues were:

- Combining the two company cultures
- Fostering teamwork to guide the transition
- Assessing management talent for the new enterprise
- Maintaining the highest degree of customer service and retention

As part of the due diligence process, corporate executives teamed with Avant to evaluate the climate, culture, business philosophy and talent of the acquisition target (Company X). Avant was responsible for gaining a deeper understanding of the business opportunities and core issues surrounding the transition and developing a plan to successfully integrate and harmonize the two organizations.

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### Client Solution Specifics

- Completed an organizational study for each company to understand the culture and operating style. This was achieved through a multi-pronged approach including an organizational survey, structured interviews with a cross section of key leaders from each business and focus groups with the field organization.
- The survey and focus groups examined the following categories: culture, environment, the work itself (e.g., roles, decision-making, engagement, etc.), business analysis (SWOT) and the transition (e.g., employee motivations, concerns, etc.).
- Completed leadership assessments for key executives in Company X to understand management style, career experiences and interest/ability to adapt to change.
- Delivered a formal quantitative and qualitative report to the senior executive group on organizational dynamics, opportunities for quick wins, critical stress points and critical leaders with clear recommendations on integration phases for key social-psychological elements.
- Worked in conjunction with executive leaders and the transition team to develop and execute a game plan to integrate the two businesses.
- Facilitated a multi-phased organizational transition and team-building process to accelerate integration with the new business and team members.
- Provided transition feedback and executive coaching to key leaders inside the new organization.

### Outcomes

- Company X achieved the originally identified bottom-line results 6 months ahead of schedule.
- Enabled early course correction of the integration teams' strategies and actions.
- Helped the integration team identify and produce quick wins for the employee base and the customer experience.
- Identified and mitigated risks to retention and engagement.
- Greatly accelerated the learning curve and appreciation of company history for each business.
- Kept core employees focused and productive by providing a clear understanding about what was/was not changing.
- Demonstrated positive change in employees' perceptions from early assimilation through the end of year one.

For more information, contact [info@avantleadership.com](mailto:info@avantleadership.com).