



Rapid Assessment: Post-Merger Organization Structure & Staffing

Completing the following scorecard will provide a quick, high-level view of how well prepared your organization is to handle several of the most essential aspects of post-merger organization structure and staffing decisions.

Steps to complete the assessment:

- Rate each item on a scale of 0 (poor) to 10 (excellent).
- Make notes for each item to explain the rationale for the numerical rating.
- Add all ten scores to get a TOTAL SCORE (maximum score = 100).
- Identify priority improvements to address and strengths to leverage.

Answer each question below considering your current methodology / approach for dealing with these common post-merger organization structure and staffing requirements, along with the typical results, issues or outcomes you experience.

“Our approach for determining post-closing organization design, restructuring, staffing or selection decisions...”

Questions to Consider:	Score (0 – 10)
1. ...is developed, well documented, approved and ready for use in a future M&A integration	
2. ...effectively incorporates financial implications of staffing decisions and accurately forecasts realistic costs, synergies and risks	
3. ...is adequately addressed during due diligence and produces the information and perspectives required for effective decision making	
4. ...includes all internal and external expertise in a timely fashion to confirm and guide the right decisions with minimal liabilities and loss in business value	
5. ...is directly linked to and driven by the strategic requirements of each deal and integration objectives that must be achieved	
6. ...achieves our need for quickly and effectively setting the organization	
7. ...achieves our need for ensuring an optimal amount of process discipline, oversight and accountability to verify the right decisions are made based on the right factors	
8. ...is transparent, well communicated and generally perceived to be an objective and fair process	
9. ...provides adequate training for leaders and managers responsible for making, communicating and implementing organizational decisions	
10. ...has a demonstrated track record of producing highly credible staffing decisions based on competencies, desired cultural attributes and results	
Total Score (Maximum = 100)	