

ARE YOU READY TO LEAD THROUGH A MERGER OR ACQUISITION?

A self-assessment for leaders on both sides of the table.

Acquisitions reward prepared leaders. But preparation only takes you so far. Knowing how to navigate what you didn't anticipate is where the real work begins.

Whether you are leading the acquired organization or integrating one into your own, these questions will help you identify where you are strong, where you have gaps, and where to focus first.

Use this before, during, or after an acquisition, whether you are leading the acquired organization or integrating one into your own. There are no right answers, just the truth as you see it right now.

SECTION 1: MINDSET & SELF-AWARENESS

- Have you fully acknowledged that things will change for you, your team, and your organization?
- Are you taking the time to celebrate what was built before, without holding onto it at the expense of what comes next?
- Are you actively protecting time for yourself during this transition, knowing that M&A demands far more of leaders than most anticipate?

SECTION 2: COMMUNICATION & TRUST

- Are you communicating consistently and authentically with your stakeholders, even when you don't have all the answers?
- Are you having the necessary difficult conversations to best serve the business and the people, rather than just your own comfort?
- Have you prioritized face-to-face time and honest dialogue with the people who matter most to this transition?

SECTION 3: CULTURAL INTEGRATION

- Have you taken the time to understand the cultural differences between the two organizations, not just operationally, but also in how people work, communicate, and make decisions?
- Do you have a plan to manage those differences in a way that respects both sides while moving toward a shared future?
- Are you creating an environment where people feel safe enough to let go of what they know and move forward together?

SECTION 4: ROLES & THE FUTURE

- Have you had honest conversations about how roles may change, including your own?
- Are you focused on the most important priorities rather than advocating for everything at once?
- Have you helped the people around you understand where they can have the greatest impact by leveraging their unique skills within the new organization?

WHERE TO FOCUS

- If most of your answers felt confident, you are well-positioned to lead through this transition.
- If several gave you pause, that's the work. Pick one section and start there.
- If you are not sure where to begin, that clarity is exactly what I help leaders find.