

# The Executive M&A Brand Integration Checklist: 9 Steps to Post-Merger Success

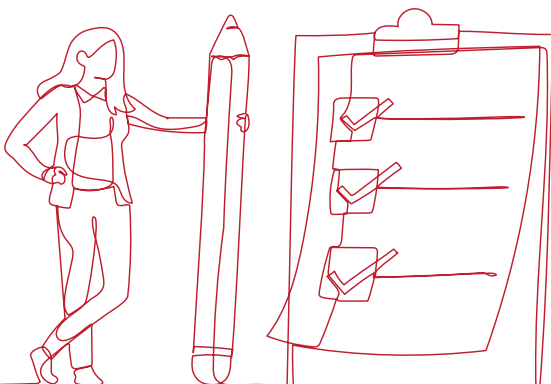
“While many consider culture a ‘non-financial risk,’ 30% of transactions fail to ever meet financial targets due to cultural issues. If these operational risks are not recognized and addressed, they can lead to low productivity, flight of key talent, customer disruption and value destruction.”\*

## 1 - Leadership Alignment & Vision

- ☐ Define a unified vision for success
- ☐ Align leadership on brand direction
- ☐ Set success metrics (internal & external)
- ☐ Identify brand risks (cultural, customer, reputation)

## 2 - Brand Discovery & Insights

- ☐ Interview stakeholders across both/all organizations
- ☐ Audit brand perceptions (internal & external)
- ☐ Assess legacy brand equity
- ☐ Review the competitive landscape for gaps
- ☐ Map culture & customer expectations



## 3 - Brand Architecture & Positioning

- ☐ Select brand architecture (branded house, house of brands, hybrid)
- ☐ Establish the role of legacy brands
- ☐ Create a unified positioning statement (based on Value Props and Voice of Customer insights)
- ☐ Develop messaging framework (employees, customers, partners, media)
- ☐ Align trademark strategy with brand decisions

## 4 - Identity & Experience Design

- ☐ Develop a refreshed visual identity
- ☐ Align voice, tone & narrative across channels
- ☐ Audit & update branded assets (website, signage, decks, documents, uniforms, etc.)
- ☐ Optimize customer-facing touchpoints (sales, support, onboarding, etc.)

## 5 - Measurement

- ☐ Establish KPIs (brand awareness, customer retention, employee engagement, etc.)

\*Black, J., Heslop, B., & McCoy, C. (2021). Culture risk in M&A. Mercer.com.

## 6 - Crisis & Contingency Communications

- ☐ Prepare reactive messaging for (staff shifts, service changes, cultural adjustments, etc.)
- ☐ Develop internal protocols for issue management and escalation
- ☐ Identify and train designated spokespeople
- ☐ Monitor internal and external sentiment throughout integration
- ☐ Align legal, HR, and comms teams around a rapid response plan

## 7 - Internal Brand Rollout

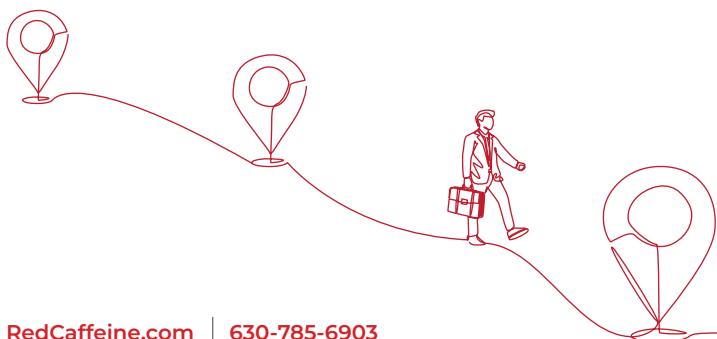
- ☐ Launch brand vision and share key assets with employees
- ☐ Equip leaders & managers as brand ambassadors
- ☐ Deliver training/toolkits for consistent messaging
- ☐ Promote wins to build momentum internally
- ☐ Resolve cultural integration challenges via brand values

## 8 - External Brand Launch

- ☐ Develop launch strategy (timing, messaging, segmentation)
- ☐ Refresh digital & physical assets
- ☐ Coordinate PR, social, email & advertising for launch
- ☐ Engage top customers & partners directly
- ☐ Evaluate reactions & feedback for agile adjustments

## 9 - Optimization Using Emerging Tech

- ☐ Automate 6- & 12-month brand health check-ins
- ☐ Audit duplicate platforms (CRM, CMS, ERP)
- ☐ Integrate customer data across legacy systems
- ☐ Use machine learning to identify friction points across the new customer journeys
- ☐ Roll out AI-powered onboarding/training tools
- ☐ Monitor social, review sites, and employee forums using AI



## Want Help Building Your Post-Merger Brand Strategy?

We offer discovery audits, brand workshops, and activation support tailored for M&A scenarios.