



Post Merger Integration HR Checklist

Day 1 & 2 of Integration

- ☐ Prepare onboarding documentation for Day 1.
- ☐ Construct a Peer-to-Peer Matrix for communication.
- ☐ Construct an interim hiring process.
- ☐ Prepare the Benefits Overview (1 hour) automatic enrollment.
- ☐ Send New Hire Packets to target site for Day 1.
- ☐ Prepare & send Acquirer 101 info pack.
- ☐ Prepare and review Comp Plan Day-1 presentation Strategy.
- ☐ Identify key HR team to be present at Day 1 for successful onboarding.
- ☐ Establish Webinar of Onboarding/Benefits.
- ☐ Prepare FAQ sheet and medium(s) for distribution/access.
- ☐ Construct content to release on target website on Day1.
- ☐ Construct a budget for Day 1 (flights, brochures, hotel, general expenses for all).
- ☐ Identify key HR stakeholders at target with whom to share Day-1 preparations.

Culture and Talent Assessment Planning

- ☐ Construct and conduct work session with key stakeholders to agree on ideas to eliminate redundancies.
- ☐ Review Target Co. org charts.
- ☐ Construct draft organization chart.
- ☐ Conduct follow-up meeting with key stakeholders to review draft and gather edits.
- ☐ Schedule and conduct presentation meeting with decision-making executives to present organization chart and gather further edits.
- ☐ Revise new org chart and job descriptions.
- ☐ Enable decision to roll out key processes—determine (with IT) when to transfer to the Acquirer's systems.
 - ☐ Compensation
 - ☐ Vacation
 - ☐ 401K
- ☐ Review and assess merit system.

- ☐ Construct merit system if none discovered in previous task.
- ☐ Have executive construct memo and publish new org chart.
- ☐ Plan and conduct meeting with department to review new organization.
- ☐ Review job description calibration.
- ☐ File new org chart into corporate archives and policy records.

Performance Management and Development

- ☐ Design Plan for assessing all employees.
- ☐ Construct Job Mapping, Job Description Matrix, and Pay Grade Assignment.
- ☐ Evaluate PMD (Performance Management Development) program at Target Co., or comparable process for evaluating pay merit.
- ☐ Perform GAP analysis on PMD.
- ☐ Design timeline for integrating Acquirer's PMD program.
- ☐ Prepare FAQ for introduction of Acquirer's PMD program.
- ☐ Construct presentation format for introducing PMD.
- ☐ Prepare a Training and Development plan from Performance Management Development (PMD).
- ☐ Prepare all severance documents necessary for planned attrition.
- ☐ Schedule a meeting with key HR stakeholders to discuss succession planning by region.
- ☐ Schedule a meeting with Finance and Legal to review plans and employee re-categorizing.
- ☐ Construct the plan for introducing new PA plan and pay grade changes.
- ☐ Schedule a target date to introduce pay grade levels and official changes.
- ☐ File new documentations into corporate archives.

Benefits

- ☐ Schedule a meeting with key stakeholders to construct Day 1 benefits rollover for all target employees.
- ☐ Schedule a meeting with key stakeholders to understand 401k vesting.
- ☐ Review any administrative service agreements (or other agreements with benefit plan administrators) with respect to any benefit plans.
- ☐ Obtain a description of all severance policies (including any written materials describing such policies).
- ☐ Obtain a description and itemized schedule of all non-salary "perks" offered to officers and employees.
- ☐ Obtain copies of all agreements relating to "rabbi trusts" or other arrangements securing in any way the payment of deferred compensation, severance, or other payments to employees or directors.
- ☐ Obtain copies of the most recent report regarding post-retirement liabilities prepared in accordance with FASB plus a schedule of life and/or health benefits for retired employees or dependents indicating whether liability for those benefits has been determined, whether and how these benefits have been funded, and the number of retirees receiving benefits.
- ☐ Schedule meeting with Legal to review any issues discovered in review of target company payroll and benefits.
- ☐ Construct any plan necessary following Legal review.

HR Orientation (Goal: Deliver within 15 days of Day 1)

- ☐ Prepare one-day presentation with proper content to deliver within 15 days of Day 1.
- ☐ Scope the content per the stakeholders for the applicable functions.
- ☐ Identify who the presenters are, the applicable topics, and whether you want to video for a webinar to distribute to multiple sites.
- ☐ Schedule the dates and coordinate with the target company.
- ☐ Design the communications in advance for distribution to all stakeholders.
- ☐ Define the stakeholders for event.
- ☐ Define the location.
- ☐ Design onboarding webinar to present to key predetermined sites.
- ☐ Determine schedule for Onboarding Orientation and whether to tie with "State of Acquirer" tour.
- ☐ Communicate schedule to key stakeholders and calendar on SharePoint.
- ☐ Host Orientation Meeting at Target Co. corporate office with webinar to satellite locations.

Onboarding Union Employees

- ☐ Design onboarding plan for union employees.
- ☐ Work with labor strategy meeting.
- ☐ Define outside counsel for assistance.
- ☐ Identify Unions and Collective Bargain Agreements.
- ☐ Complete HR, Payroll, Safety, and Code of Conduct for Union employees.

Integration MBO / Career Development

- ☐ Determine financial goals for integration.
- ☐ Establish "pool" of funds for distribution.
- ☐ Build evaluation criteria.
- ☐ Write incentives into personnel MBOs for year end.
- ☐ Design a career plan into corporate development for future integrations.
- ☐ Plan communication process with each task leader to introduce the Integration MBO.
- ☐ Schedule meetings with each task leader.
- ☐ Document MBO Plan into corporate archives.

Personnel Reduction Phase

- ☐ Schedule a meeting with Legal/Finance/Treasurer to discuss "planned attrition" and target date for first RIF and subsequent RIF plans.
- ☐ Assess fully the burden cost.
- ☐ Develop a budget and financial synergy for RIF Phase(s).
- ☐ Plan timing and packages.
- ☐ Construct a severance package based on Acquirer policy.
- ☐ Schedule a meeting with Legal.
- ☐ Schedule a meeting to share plan with Target management.
- ☐ Design plan and budget for any additional reductions.
- ☐ Begin construct of Phase 2 RIF.
- ☐ Formalize all RIF plans and document with the IMO.

Retention Fees—Any Remaining Plans

- ☐ Schedule key stakeholders meeting to identify critical personnel utilizing Personal Assessment rankings.
- ☐ Prescribe the package—what to include.
- ☐ Construct (within first 30 days) internal budget for retentions that is appropriate to Integration Cost Code.
- ☐ Schedule meetings with respective department leads to review Retention Plan and budgets.
- ☐ Plan offerings to respective personnel.
- ☐ Document Retention Plan into corporate archives.

Integration New Hire Plan Day 1 – 90

- ☐ Schedule a meeting with key stakeholders to define and construct an interim hiring plan for Q1 integration activity.
- ☐ Share Grades/Ranges for hiring.
- ☐ Publish New Hire packages to key management for distribution.
- ☐ Establish whether training is necessary to introduce New Hire package.
- ☐ Integrate internal posting of all jobs on the intranet to follow Acquirer policy prior to posting on outside boards.
- ☐ Publish the Transfer and Promotion letter templates on Intranet.
- ☐ Construct a line-of-authority based on R&R for New Hires.
- ☐ Establish a budget of New Hires.
- ☐ Gather a list of potential hires that have been through interview process and are identified as key targets.
- ☐ Construct a formal plan to publish with key stakeholders the interim hiring plan along with line-of-authority and signature approval.
- ☐ File Integration New Hire Plan (Day 1 - 90) into corporate governance.
- ☐ Update Relocation Policy to Acquirer's.
- ☐ Update Job Req Process to Acquirer's.
- ☐ Review policy on external recruiters and implement/edit Acquirer's standard.
- ☐ Review Tuition Reimbursement Policy and align to Acquirer's.
- ☐ Document and Implement Acquirer's Vacation and Sick Leave Policy to all Target Co. employees.
- ☐ Align the VRP (Vehicle Reimbursement Policy) and match to job description and employee level.
- ☐ Construct a plan (Roadshow) to share all new Policies and Procedures.
- ☐ Document all New Hire Policy/Procedures into corporate archives.