



## Mergers Mastered: Expert Advice on Successful Leadership Through a Merger

**Description:** In this special edition episode of *The Forward Thinking* podcast, host Jean Cantey Segal, Chief Learning Officer, FCCS welcomes Jay Lux, Vice President of Leadership & Organizational Development for FCCS, Leslie Hilton, Vice President of Governance and Board Development, and Angie Coleman, Organizational Development Consultant with FCCS. In a roundtable format, they discuss their insights on mergers and strategic alliances. They introduce best practices to help teams, leaders, and board members navigate and thrive in the midst of a merger.

“There needs to be some really thoughtful strategies in place when two organizations are trying to merge together.” — Angie Coleman

“Thorough, consistent communication at every level of the organization, particularly at the senior leadership team, that all matches up, is critical.” — Jay Lux

“Try to make every exercise, every activity, every decision around a merger something that has really received thoughtful, insightful treatment.” — Leslie Hilton

Episode Insights Include:

### **Successfully combining two company cultures**

- + Thoughtful strategies are necessary when two organizations are merging.
- + Complex company cultures can be approached with intentional collaboration.
- + Non-negotiables need to be outlined early in the merger to avoid employee confusion.
- + Start by identifying if both organizations have a firm grasp on their own company culture.

### **Effective communication during a merger**

- + Leaders need to stay in tune with the employee pulse throughout the merger.
- + Surveys can help to avoid addressing issues that may not be a real problem.
- + Leaders need to offer regular and transparent communication with employees to dispel rumors and fear.



- + Mission values and company culture need to be preserved as appropriate throughout the merger process.

### **Leadership advice for enhanced communication**

- + Ensure that there is clarity in the message as it is distributed to employees.
- + A one-page update can go a long way to prevent miscommunication.
- + Senior leadership needs to be more candid about updates, with up to 10x more communication.
- + Scheduled updates can provide expected and appreciated communication.
- + Consider bringing back retired leadership to consult or temporarily removing employees from their regular position.

### **The director perspective on mergers**

- + From a 30,000 ft level, the board's role in mergers requires harder conversations about the impact on stakeholders.
- + The board needs to keep an eye on the long-term future direction of the organization.
- + The board must consider the culture and integration of the two merging boards into one.

### **Insightful questions to ask during a merger**

- + Who will this merger impact and how will they be impacted?
- + What plans is management putting in place to manage impacts and mitigate risk?
- + What opportunities and risks will this merger present?
- + What does the future look like as a result of this merger?
- + What key things will make this merger highly successful?

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### **Get in touch**

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***We welcome a conversation on how FCCS can help your organization before, during and post-merger.***