

M&A CULTURE SCAN



CULTURESTRATEGYFIT®

MINIMIZE CULTURE TENSIONS

Time is limited in M&A. The **CULTURE-STRATEGY FIT® M&A Culture Scan** is a quick 14 statement, 1-2 question survey that assesses culture in areas where **differences in culture may create culture tensions or drag** that will impact integration success. Use this survey to:

- Gain objective insights around areas of potential culture hot spots
- Base understanding of culture differences on current reality
- Make sure early decision making and communications minimizes culture 'red flags'
- Develop a shared view of what to pay attention to
- Open-up conversations about culture similarities and differences
- Ensure integration plans are effective

FAST FACTS

- Research-based survey specific to M&A
- 14 culture attributes, 1-2 questions, 5-6 minutes
- Comparison data displays
- Simple, business language
- Rapid set up and reporting
- Industry-leading data security
- Use desk top, phone or tablet
- E-mail invitations and reminders for high participation rates
- Survey available in most languages, report in English



WHEN TO USE IT

This short survey can be used pre- or post-close and anytime groups are considering amalgamation.

- Integration Team – planning
- Leaders –when amalgamating groups
- HR/OD – input to recruitment, onboarding & development
- Executive Coaching/Development – planning & onboarding
- Risk/Compliance Office – risk management

HOW IT WORKS

Our **Culture Resource Center** provides a quality survey experience for all parties. By pre-loading e-mail addresses and demographic data, the organization can be assured that all participants will be allocated to the right group. For users, the quick launch of the survey from a third-party mitigates concerns about **confidentiality** and provides **convenient, mobile access**. For data security, we employ **industry-leading privacy** and **security** measures. This approach results in **better participation rates, increased candor and data accuracy, plus greater satisfaction** with the survey process. Several tools help with organizing for the survey. The typical process is:

Identify Your Needs

- You identify the desired survey languages, reports and schedule
- You summarize this on the Culture Survey Intake Tool and send it to the Culture Resource Center. If group or departments are to be compared across the new entity, a hierarchy of reports with matching departments must be provided
- We confirm the schedule for your survey and commit to your report delivery date(s)
- We provide the Getting Organized Tool and a Data Upload Tool for survey set-up. This provides information on firewall whitelisting, testing, status reporting and requirements for the employee Data Upload file.

Set-up and Run Survey

- You provide an employee data Upload File for each organization
- You provide IT with whitelisting information so the survey will not be blocked
- You complete a technology (firewall) and content test of the survey before launch
- You send employees a communication about the purpose of the survey with start and end date
- Our secure survey engine sends participants an email invitation containing their personal link
- Participation status reports are most often sent twice a week

Receive Reports

- You receive your reports within 4 business days, or as agreed (reports requiring translation of open-ended question answers can take up to an additional 10 business days).



SURVEY OPTIONS & PRICING

We have two approaches for making your experience with the **CULTURE-STRATEGY FIT® M&A Culture Scan** a success.

You Do It: You receive the **CULTURE-STRATEGY FIT® M&A Culture Scan Report**. You work through the report to understand areas of culture similarity, differences and tension.

Total Survey Population

Less than 50
51-250
250-500
501-1000
1001-2500

Fee

\$795
\$1195
\$1495
\$1895
\$2395

Deeper Dive Options

Sub-report

Sub-report with PPTs

Fee

\$175

\$225

Multi-language Options

1. Multi-language Survey - Survey set up in requested languages.
(Report in English; responses to verbatim questions untranslated)
2. Multi-language Survey - With Translated Verbatim Responses to Questions

Fee

NC

- Survey set up in requested languages; translated responses re-inserted \$500
- Plus translation handling fees based on number of languages \$500-1500
 - 1-5 \$500
 - 6-10 \$1000
 - 10+ \$1500
- Plus translation by third party translation firm

Charged at cost

We Help: If support is desired, we are here to help.

Report Walkthrough

1 hour walk through of report with a culture expert.

Fee

\$750

Give us a call to discuss your needs



“To be successful in a merger, you have to show respect for the acquired company's culture and ways ... Your goal should be to achieve something together that neither company could do alone. Unfortunately, once the deal is done, buyers often lose sight of that goal. They try to fold the new company into the existing one, squashing the acquirer's creativity, leadership, and vision in the process.” **Memo to AOL Time Warner: Why mergers fail**, Workforce, Feb, 2003, by Sarah Fister Gale