

Appendix L: Interim integration process model questionnaire

Interim integration process model questionnaire:

1. To investigate how acquiring organisations address strategic, organisational and cultural alignment and fit.
2. To develop a complete acquisition integration process model.
3. To determine criteria for organisations to consider when assessing strategic, organisational and cultural factors in acquisition integrations.

Background factors:

1. Would you agree with the need to project manage the integration?
2. If yes, when would you start the integration process?
3. Would you agree that the extraneous risks need to be managed throughout the integration process?

Pre-acquisition phase:**1. Acquisition Context:**

Would you agree that one needs to be aware of whether it is a

- a. Competitive sale or fire sale?
- b. The macro economic situation (boom or bust economy)?
- c. Would you include anything else?

2. Strategic High-level analysis:

Would you agree that each of these 4 factors are evaluated simultaneously

- a. Acquisition purchasing motive
- b. The parent's corporate strategy.
- c. That a high-level plan for the acquisition is developed (acquisition strategy)?
- d. That acquisition specific objectives are developed or thought-out?

Are these thought-out intuitively or planned?

Is a series of high level objectives developed at the end of this stage?

3. Detailed candidate analysis:

- Would you agree that these three elements are looked at simultaneously either intuitively or in a planned manner?
- Is the due diligence carried out in a phased basis as suggested?
- Is the end product of the due diligence process a high-level business plan / Strategic acquisition objectives?

4. Pre-acquisition planning for post-acquisition integration:

Typically this aspect goes from high-level detail to very detailed plans

(Note: See flow diagram).

- Would this high-level planning stage be carried out as follows
 - Integration approach (i.e. Standalone, partial or full integration)
 - High-level integration plans (i.e. short, medium and long-term)
 - Specific plans (i.e. BPR, BD, efficiency plans, NPD plans, etc.)
 - Task planning (i.e. Strategic, organisational and cultural tasks and % weighting assigned to each).
 - Detailed plans based on S.M.A.R.T. objectives and that are put on Gantt charts into project management software.

Note: Might this be completed any other way?

5. Negotiation:

Are the 4 phases correct or is there anything missing?

- Pre-acquisition plans for post-acquisition integration
- Strategic negotiation issues, TSA's or SLA's and other integration specific elements.
- Unique sale elements (Type of sale and macro-economic situation)
- The development of a negotiation strategy based around these elements.

Post-acquisition phase:

1. Implementation of pre-acquisition plans for post-acquisition integration, does it happen like so?
2. Is a post-acquisition verification and review process carried out?
3. Does this aspect involve a lot more detailed soft-cultural fit analysis?
4. Do all of these elements feed into possible modification of the pre-acquisition plans?
5. Once this verification and review process is complete are the long term plans modified to the new realities of the situation?
6. Should a complete review of the process be undertaken post acquisition and how should it be assessed?
7. Should a review be undertaken at the end of each of the phases based on the acquisition objectives?
8. Should the process be modified based on the lessons learned?

Would you do anything differently?

Is there any aspect of the integration process missing?

Based on all of the above would you see the need to develop an integration process model? If so, why? Would you now develop one?