

Appendix D: Main Study: Information to look for in documents searches

Information to look for when collecting documentary evidence

General company background information:

- Markets served
- Services provided
- Mission of the acquisition organisation
- Company SWOT analysis

Main Criteria	Details	Checked
1. Acquisition strategy		
- Written (formal)		
Motive of the acquisition (Consolidation, New Markets, A substitute for R&D, Economies of scale, Reduce risk, To gain technology, Close to customers, Markets served, Etc).		
Objectives of acquisition - Short - Long term		
Strategy details (Criteria to acquire by; Milestones, Objectives, CSF's) Financial 1. 2. 3. Fit factors - Strategic 'fit' - Organisational 'fit' - Cultural 'fit' Critical success factors 1. 2. 3.		
2. Candidate Selection:		
Objective of the acquisition - Strategic 'fit' - Organisational 'fit' - Cultural 'fit' - CSF's		

3. Due Diligence:		
Objective of Due Diligence		
<ul style="list-style-type: none"> - Financials - Legal 		
<ul style="list-style-type: none"> - Strategic 'fit' - Organisational 'fit' - Cultural 'fit' 		
<ul style="list-style-type: none"> - CSF's 		
4. Pre-acquisition Integration strategy		
Yes / No?		
Objectives for integration		
<ul style="list-style-type: none"> - Short-term - Long-term 		
Duration of integration		
<ul style="list-style-type: none"> - Short-term - Medium - Long-term 		
Tasks		
<ul style="list-style-type: none"> - Organisational tasks - Cultural tasks 		
CSF's		
<ul style="list-style-type: none"> - Organisational - Cultural - Financial - Legal 		
5. Post-acquisition Integration strategy		
Yes / No?		
Objectives for integration		
<ul style="list-style-type: none"> - Short-term - Long-term 		
Duration of integration		

<ul style="list-style-type: none"> - Short-term - Medium - Long-term 		
Tasks <ul style="list-style-type: none"> - Organisational tasks - Cultural tasks 		
CSF's <ul style="list-style-type: none"> - Organisational - Cultural - Financial - Legal 		
6. Integration Approach		
<ul style="list-style-type: none"> - Low - moderate - high-level 		
Critical Success Factors <ol style="list-style-type: none"> 1. 2. 3. 4. 		
Duration of integration		
Strategic 'fit'	Economies of scale, Related / Unrelated, Complementary resources, Similarities, Core competencies, Etc.	
Organisational 'fit'	Reward systems, Processes, Structures, Etc.	
Cultural 'fit'	Humana resources policies, Similar Styles of management, Diversity policies, Tiers of management, Management philosophy, etc.	