TEN QUESTIONS TO ASK THE MANAGEMENT TEAM AT DAY 30 AFTER CLOSE

Thirty days in, the model is still a model. These ten questions tell you whether it will *come true.*

Ask them in the first board meeting after close, or on the next site visit. Two questions per line of UNITE — the five lines a board checks at day one hundred. A good answer is specific, dated, and visible on the acquired side. A bad answer is a plan.



UNITE · UNIFY COMMAND · NAME THE DECISIONS · INSTALL THE RHYTHM · TIE MONEY TO NAMES · ENGAGE THE PEOPLE

1 Show me the org chart. Not yours and theirs — the one. U

A GOOD ANSWER
One chart to the second layer, signed by the board, shown to both leadership teams in the same week. Every box named or marked open with a date.

A BAD ANSWER
Two charts with a dotted line between them, or "we're finalizing it." Thirty days in, that means nobody below the CEO is deciding anything.

2 Who runs operations on the acquired side this morning, and who told him? U

A GOOD ANSWER
A name, a date, and the fact that he heard it in person from the person he reports to. He has terms in writing.

A BAD ANSWER
A pause. Or a name and "it's understood." If he has not been told, a recruiter has already called.

3 A plant manager on the acquired side needs to approve $40,000 on Friday. Who says yes? N

A GOOD ANSWER
A rights matrix by role and dollar limit, set in the bank, the ERP and the card program on both sides. She approves it herself.

A BAD ANSWER
"She'd run it by…" Two sets of decision rights is two companies, however the press release read.

4 Which two people both think they own the same account? N

A GOOD ANSWER
A seat ledger — needed, filled, doubled, open — with a decision and a date for each double. Account ownership decided and told to the customer.

A BAD ANSWER
"We're working through it." The customer notices the seam before the company does; the first lost revenue after a deal comes from here.

5 When was the last month-end review with both companies in one room reading one pack? I

A GOOD ANSWER
A date inside the last thirty days, a chair, an agenda, and one pack. The legacy meetings retired by name.

A BAD ANSWER
Two meetings, two packs, a reconciliation spreadsheet. The board number cannot be defended because nobody owns it.

6 Two people doing the same job on either side of the deal: are they paid the same? Which benefits plan are they on in January? I

A GOOD ANSWER
The compensation analysis done on one architecture, the harmonization rule decided and costed, one benefits plan with a cutover date, told before enrollment.

A BAD ANSWER
"We haven't compared yet." The employees have — in the parking lot — and the gap is already a rumor.

7 The model said three million of synergies. Who owns the first million, and by when? T

A GOOD ANSWER
A synergy register tied line by line to the deal model: owner, target, date, budget line, status. Reviewed monthly against plan.

A BAD ANSWER
A slide. A synergy with no owner has no date, and a number with no date slips a quarter at a time, with an explanation.

8 What has integration cost so far — not the fees, the business? T

A GOOD ANSWER
An integration P&L: severance, retention, two systems for a year, the customers lost at the seam, the distraction — estimated and actual, read beside the synergies.

A BAD ANSWER
Blank. The dis-synergies are paid either way; unplanned, they are paid as a surprise and make the synergies look like they failed.

9 Name the five people whose resignation would reprice this deal. When did you last talk to each of them? E

A GOOD ANSWER
Five names from the deal model, a conversation per person held by the person they will report to, retention terms in writing, the list reviewed monthly.

A BAD ANSWER
A list that has to be built on the spot. Those five are the five recruiters are calling this week.

10 What does day one hundred look like, on one page — and what day is it? E

A GOOD ANSWER
A date on the calendar and a scorecard built from the lines above: the chart, the team, the cadence, the synergies, the people. The board review booked.

A BAD ANSWER
A phase in a Gantt chart. Without a date and a page, the integration ends when people stop talking about it, which is before it is done.

If more than three answers were bad: the integration has not started, whatever the closing date says. Score the deal on the free UNITE check at scalewrights.com/integrate — fifteen lines, five minutes — or send the integration plan for the Integration Read ($1,750 flat, five business days, Scott's red pen in writing).

Flat fees only. Never a success fee, a percentage of the synergies, or equity. Scalewrights is an advisory firm, not a broker-dealer, investment adviser, or law or accounting firm.

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EVP through a sale to private equity; Chief People Officer of the acquirer — six manufacturers, seven plants, 2,500 people made one company. Eleven HVAC businesses into one. PhD, industrial-organizational psychology.