

Transition Planning and Change Management – The R3 Advantage Approach

The Merger

The legal enactment of a merger is always the least time consuming part of the process – enabling the new entity to think and act as one seamless organization is the real challenge in any merger. This issue is compounded by the size of the organizations being merged, consolidated and/or divested.

Brief

All the necessary actions have to be in place in order to become one legal entity, and expertise is required to support the Chief Executive, Senior Management team and trustees involved in the transition to an integrated organization that thinks and acts as one.

Our Approach

Our first task is to develop the following;

1. Project plan of tasks
2. Timescales and responsibilities
3. Communications management – internal/external, employees, board and all other affected parties/entities.
4. Project management and governance framework for the transition.
 - a. This framework defined the role and composition of a Transition Steering Group and the Transition Teams for each key element of the project.
 - b. It included guidance notes and templates for the preparation of project plans, risk registers, budgets and contingency plans.

We also provide expert change management and merger implementation by:

- Becoming members of the Transition Steering Group, Finance, IT and Governance Transitions Teams
- Give one to one support to the Chief Executive.

Expected Achievements

The transition to one organization is a marathon not a sprint. Our input will enable the client to:

- . Achieve key deadlines
- . Assess and manage costs and risks
- . Involve key staff in the process
- . Proactive anticipate problems and issues and mitigate accordingly.

In tackling the hearts and minds issues that would prevent a successful merger, a rigorous change management process is important and needs to be underpinned by a commitment and “buy-in” and no matter how good the process, it is the people that “make it happen”.