



# **4 Critical Actions for Effective M&A Communications**

# Introduction

Effective communication is the linchpin of successful mergers and acquisitions (M&A), yet many leaders underestimate the profound impact their words and actions have on team performance during these pivotal transitions. In times of uncertainty, every message — or missed opportunity for communication — can galvanize a team or erode its engagement.

In addition, research on sustaining employee engagement during times of great change suggests that mid-level managers and supervisors are the fulcrum: the pivot point of support upon which teams rely. [Forbes](#) points to mid-level managers as one of the most important drivers of merger success, and data from Gallup concludes that managers are responsible for [70% of the variance in employee engagement](#).

This article outlines the critical business case for strategic communications before, during, and after your merger or acquisition, and offers four actionable strategies managers can adopt along the way to help leaders foster a resilient, high-performing team.



# M&A Communication Plans Are Critical for Integration Success

Successfully executing an M&A deal requires careful attention to countless details, regardless of the size, structure, or transaction type. And with so many complexities at play, it's an unfortunate reality that creating a robust communications plan often falls by the wayside, a costly misstep that can undermine the entire process.

In our work advising clients through these deals, we often find that organizations don't have a dedicated resource for their communications strategy. As a result, the responsibilities end up divided among several stakeholders, leading to communications that feel fragmented, disconnected from the culture, or create more confusion than clarity.

To avoid these pitfalls that impact employee confidence, it's essential to take a centralized, coordinated approach to communications. The goal of M&A communications is to establish a clear plan for how--and when--you will communicate throughout this new chapter of the business. When this foundational work is in place, you have created the conditions to build trust, enable consistent information flow, and set the stage for unifying two organizations into a single, integrated enterprise.



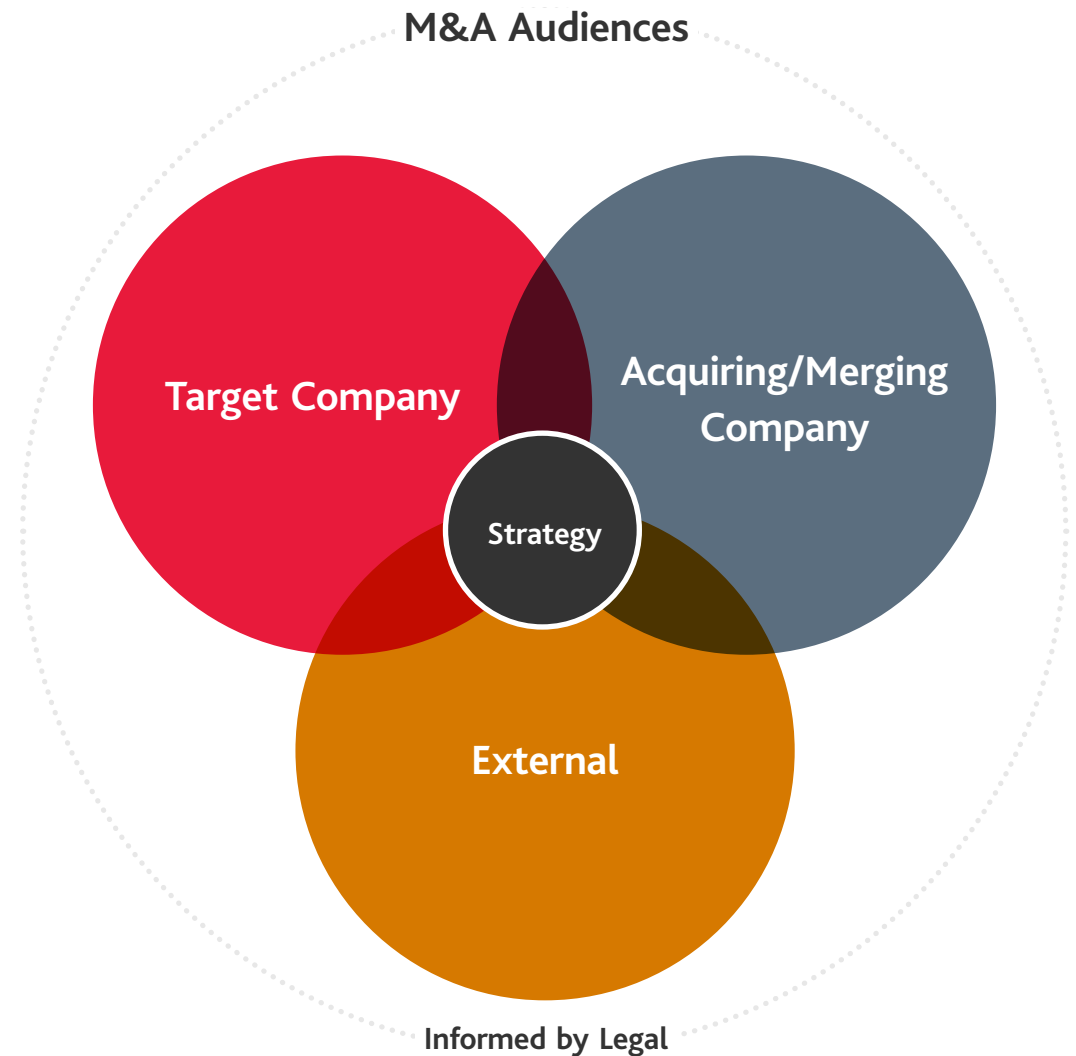
# Anatomy of Effective M&A Communications

A well-rounded M&A communications strategy should concern itself with three primary audiences:

- ▶ **External audiences**, such as customers, vendors, partners, and the public, will typically hear of the transaction through social media posts, press releases, or news outlets.
- ▶ The **target company**, including the individuals who are most directly affected by the deal.
- ▶ And the **acquiring or merging company** itself. These employees may also be directly affected by the integration, though often to a lesser degree.

As our graphic illustrates, each of these target audiences relates and connects to one another, but communications should consider how to best position information for its intended audience. An official press release, for example, should look and feel much different than an email sent to the target company's employees.

That said, even though messaging should be tailored to specific audiences, it should always connect back to the core strategy, which is centered in your vision for the future and the “why” behind the integration.



# Your Communications Should Fit Your People (And Not the Other Way Around)

Just as no two M&As are the same, no two communications strategies should be the same. While best practices can and should guide direction, communications that reach their intended audiences and lead to intended outcomes are those designed with a people-centered philosophy. We call this approach [Human, Compelling, Visual Communications™](#).

Here's how it looks in practice:

## BE HUMAN

During an M&A, it's critical to focus on messaging built on our shared humanity and focused on fostering community and empathy. Put yourself in the shoes of your audiences and lean on existing communications channels (where they exist) so that all parties are receiving communications in formats that feel familiar.

Part of making communications feel human is leaning into our innate abilities to spot connections and find patterns. The key is repetition: reiterating the most important details about the deal regularly and ensuring that it stems from the same source — be it a well-known leader of the organization or a dedicated section in your intranet. Establishing a regular cadence for communications provides a sense of stability amidst the transformation, and it helps ensure people know where, when, and from whom they can expect updates.

## BE COMPELLING

Moving beyond the initial transition and into action requires communications that elicit employee buy-in, cut through the noise, and illuminate the vision and purpose behind bringing the two organizations together — all of which can be addressed by answering these types of questions:

- ▶ Why are we doing this?
- ▶ Why is it happening now?
- ▶ What new opportunities, growth, and innovation does the deal offer to the people who work here?
- ▶ What will it enable for customers and stakeholders?

## BE VISUAL

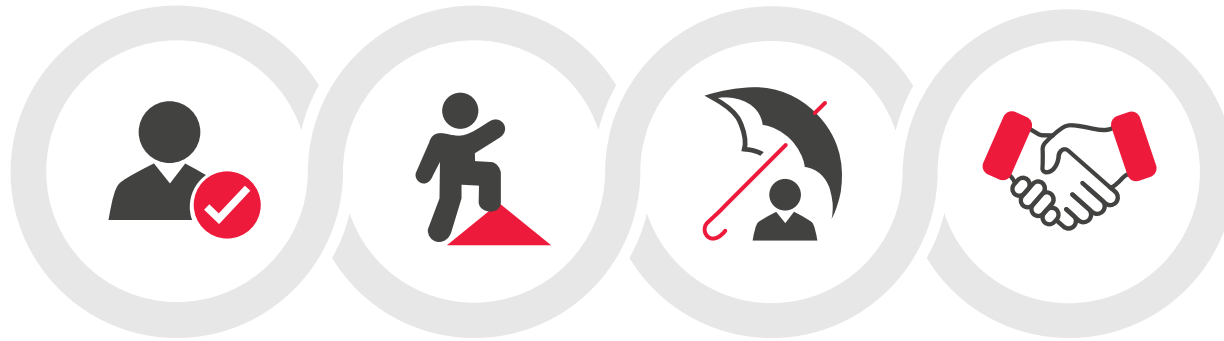
In our experience, **how** you share information is just as important as **what** you are sharing. Supporting your M&A story with visuals builds connection and alignment faster than words alone.

Our long-standing M&A work with a high-tech firm client is a great example of how communications that are human, visual, and compelling can engage, inspire, and unite teams. Our consultants recognized that the success of one deal, in particular — which involved a target company of around 40 people — would be contingent on retained employees feeling seen, valued, heard, and included.

Because talent retention was a key measurement of success, we took the time to develop a custom welcome book with individual photographs of each person on the cover. The product was widely and warmly received by team members across the organization.

# 4 Manager Actions for M&A Communications Success

So how can managers deliver effectively on such a pivotal responsibility?  
M&A communications boil down to four critical actions:



Put On Your Own  
"Oxygen Mask" Before  
Assisting Others

Stay One  
Step Ahead

Create a Safe  
Environment

Reach Out  
for Help



### 1. Put On Your Own "Oxygen Mask" Before Assisting Others



Your team members will be looking to you for cues. Do you appear anxious or confident? Are you informed about the merger and what it means to you and your team? Are you distracted by the unknowns or focused on today's priorities?

Your employees need to feel your strength through the ambiguity, so be sure you're well-informed, calm, and prepared before trying to help your team.

### 2. Stay One Step Ahead



If there's one powerful tool for building confidence, it's information. Review and be sure you understand the company's formal communications early and know your facts.

Ask questions and know what questions to anticipate from your team. Identify and write down two or three core messages that you need your team to hear, and bridge back to those core messages repeatedly over time.

Hearing a consistent message helps ground people and keep them focused on more tangible, positive outcomes — like how the merger will help the company move forward. Don't forget to share any trending concerns with your leadership to help ensure they have a pulse on their employees' sentiments.

### 3. Create a Safe Environment



Keep your office door open as much as possible and welcome drop-ins from your team. Encourage them to ask questions and voice their concerns. You may not have all the answers, but it's important to acknowledge the questions and concerns. Let them know when you don't know and pledge to try to get answers. Finally, step up the frequency of your team communications and favor in-person or on-the-phone conversations over email alone.

Every question presents an opportunity to bridge to one of your core messages. While you want to get as much clarity as possible, getting comfortable with ambiguity and modeling that comfort level with your teams is just as important.

### 4. Reach Out for Help



Your Corporate Communications or Human Resources (HR) team likely has some resources to support you with the above, such as company merger messaging, video messages from your leaders, slides, FAQs, training, etc.

Companies that understand the crucial role of managers in [helping teams navigate change](#) often develop M&A Tool Kits to facilitate the transition. If you haven't seen resources like this, reach out to your Corporate Communications or HR leaders proactively.

Managers, don't forget that you're the fulcrum. You have the responsibility (and ability!) to provide the support that fuels your team's engagement and productivity.



# Bring Your Communications Strategy to Life

At BDO, [we've supported](#) organizations of all sizes — including many Fortune 500 companies — through their mergers, acquisitions, and other substantial transformations. [Contact us today](#) to learn how our approach can drive your success.



## CONTACT US



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**Have questions or want to learn more? Contact us!**

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