CUSTOMER COMMUNICATION CHECKLIST FOR M&A

AUDIENCE SEGMENTATION

- [ ] Group customers by size, region, and contract type
- [ ] Flag high-risk and high-value accounts
- [ ] Identify accounts with upcoming renewals or open issues
- [ ] Tailor messaging based on industry-specific needs

MESSAGING TOOLKIT

- [ ] Create a unified message guide for all teams
- [ ] Draft initial blog, email, and press release content
- [ ] Build a short internal FAQ for frontline teams
- [ ] Plan 30-, 60-, and 90-day message touchpoints

CHANNEL READINESS

- [ ] Launch or update a transition landing page
- [ ] Coordinate messaging across email, social, and product
- [ ] Prepare banners, headers, and temporary notices
- [ ] Upload scripts and responses to internal portals

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CUSTOMER SUCCESS SYNC

- [ ] Train reps on tone, timing, and escalation paths
- [ ] Share FAQs and approved talking points
- [ ] Centralize feedback using CRM tags or forms
- [ ] Host quick syncs to surface real-time insights

MONITORING & ADJUSTMENTS

- [ ] Track open rates, replies, CSAT, and churn
- [ ] Identify confusion or drop-off by message type
- [ ] Update FAQs and follow-ups based on feedback
- [ ] Publish a “What’s Next” roadmap to maintain trust

REPUTATION & TRUST MANAGEMENT

- [ ] Monitor social channels and forums for brand sentiment
- [ ] Identify key advocates and high-visibility customers
- [ ] Prepare public responses to common concerns or criticism
- [ ] Coordinate with PR to manage media or analyst inquiries

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