



MARKETING TEAM CHECKLIST: PREPARING FOR AN ACQUISITION



FOUNDATIONAL AWARENESS

- ☐ Get an M&A briefing from leadership team
- ☐ Clarify scope, goals, and integration timeline
- ☐ Confirm if brand will merge, retire, or evolve
- ☐ Define marketing's role in the transition plan

INTERNAL COLLABORATION

- ☐ Identify key cross-functional team leads
- ☐ Join integration workstreams or planning groups
- ☐ Align messaging with HR and internal comms
- ☐ Set weekly syncs for updates and blockers

BRAND & ASSET REVIEW

- ☐ Audit website, decks, emails, and social posts
- ☐ Flag outdated or duplicate content for cleanup
- ☐ Pause or update scheduled campaigns and flows
- ☐ Track all updates in shared documentation hub



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CUSTOMER & PARTNER MESSAGING

- ☐ Draft announcements for customers and partners
- ☐ Build an FAQ for account and support teams
- ☐ Customize messaging by segment or priority level
- ☐ Monitor sentiment across email and support

TEAM SUPPORT & MORALE

- ☐ Check in regularly with team members
- ☐ Share changes to priorities or workload early
- ☐ Celebrate small wins and major milestones
- ☐ Block time for deep work and mental reset

TOOLS, SYSTEMS & TRACKING

- ☐ Audit marketing tools across both companies (CMS, CRM, email, etc.)
- ☐ Identify overlaps, gaps, and key integration points
- ☐ Set up shared folders and dashboards to track progress
- ☐ Ensure access and backup of critical brand assets