

Proposal for Building Unity and Singleness of Purpose within a Complex Merger
Using Assessments to Accelerate Change

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Introduction

Perkins and Associates, L.L.C. has been retained by IPSol International, L.L.C., a small privately-owned talent management consulting firm, for the purpose of preparing it to formally merge with, HRPros, Inc., another small, privately-owned talent management firm. The merged companies will result in a single, privately-owned, company that blends the best from each of the two separate corporations. Due to the proprietary nature of the businesses, the names of the businesses, executive players and details of the merger have been changed slightly or excluded to protect business privacy.

This document sets forth the conceptual framework for the strategic change, a description of the change model and methodology for the re-alignment, a balanced scorecard outlining the newly-defined mission, vision, and values of the organization as well as the business metrics that will define its successful transition from two distinctive business entities into a single business enterprise. This project does not include the legal or financial details of the merger, which are being addressed by the firms' legal teams.

Company Background

IPSOL International is a privately-owned, talent management consulting firm, headquartered in Central Nevada. The company was birthed by two business entrepreneurs whose friendship brought them together as business partners. Their original focus was training and development and later turned to executive coaching and subsequently to turn-key talent-management solutions that include consulting services. Together, they built a national sales team of alliance partners who licensed their product set as part of their own business portfolio. Today, they boast of a 2000-person international organizational of partners in 60 countries. They provide product and services solutions to assist managers with talent selection and development, leader selection and development, performance management, succession management, team optimization and cultural transformation. In house talent includes a support staff of 160 professionals who represent the best in their areas of expertise, including cross-industry business, HR and OD professionals, software developers, marketing, sales and service professionals, a legal and scientific experts, and technical information systems technologists.

Goal of the Merger

IPSOL International is looking to expand its impact and influence in the talent management industry by developing business alliances and merging its team with targeted experts in the field. One such merger is planned with HRPros, a recognized authority in the area of international global management solutions. IPSOL International's merger with HRPros, Inc. will expand the company's influence, credibility and global presence as an international player in talent management solutions. The merger will give IPSOL access to HRPros' technology, product solutions, talent and client set. This proposal outlines the critical considerations for preparing IPSOL International for successfully blending these two business structures and organizational

cultures; and building a new corporate mission-vision-value statement and international business direction.

Preparing the Business for the Merger

The planning and preparation for acquiring a business is a multi-faceted and multi-dimensional process. The leaders must consider not only the current business posture and environmental climate but project the perfect intersection of their current business, environmental climate with the merge partner at some point in the future. The visual analogy is a quarterback projecting the angle and speed of a football, projected toward an intended receiver that is also in route toward an end destination at some designated point on a football field. In this simplistic example, failure to consider all of the factors, including the likelihood of opposing adversarial interference, could result in a failed attempt. In a business venture, such as the one described by the merger of IPSOL and HRPRO , a failed attempt could cost both companies more than yardage or six points on a score board.

In much of the research on organizational change, the researchers site organizational culture as an essential component in the success of a merger. Latta's (2009) ethnographic research confirms organizational culture as a key factor in the influence of successful introduction of change. In fact, Latta (2009) identifies eight stages of influence that could be incorporated into the process model for change (Latta, 2009). Starzee's (2007) research in the area of complex business mergers affirms that considerations for corporate cultures and communications are equally as important as Deloitte's (2012) indication that financial readiness, business/process discipline, and technological compatibility may be pre-requisites for successful business amalgamation.

To be continued.

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