

# Factors to Creating Successful Organizational Integrations

When organizations are considering some form of integration it is important to know what conditions contribute to the overall success of the integration. Below is a summary of conditions that contribute to the success of each phase of organizational integration.

## Phase 1 - Exploration



Strong and committed Leader and Management Team	The presence of a strong and committed leader and management team who can visualize and articulate the importance of the integration is critical to success. Leaders must balance dedication to the mission of their organization with commitment to the changes that will happen during the integration.
Process Knowledge	Research and understanding of other organizations experience, the integration process, and possible options is important for effective leadership and board discussions.
Previous Partnerships	Integrations are most successful when organizations already have a history of cooperation and collaboration.
Board involvement	Aligning board cultures and perspectives is required in order to develop a shared vision for the integration.
Third-party facilitator or consultant	Investment in a neutral consultant can help each organization explore potential integration options in a non-threatening manner
Clear expectations	An agreed upon set of expectations and a clear plan for this exploration phase is required to ensure both organizations understand what is expected and when activities will occur.
Complementary partners	Having closely aligned missions and complementary services can ease the integration process, but it can be equally important that the integration expand upon and improve the quality of existing services. Having cultural values discussions and clearly establishing the "why" for any integration model will provide a foundation for all conversations going forward
Financial Contribution	Willingness of both organizations to contribute the time and financial resources in the exploration phase is an important condition to success.
Communication	Establishing regular communication within the organizations to discuss the potential of integration is critical. Failure to effectively communicate information about the potential integration has proven to have negative outcomes.

# Phase 2 - Planning

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Involvement of board and key stakeholders	Full commitment to the integration planning process by the boards of both/all organizations is key to success.
Executive Leadership Relationship	A positive relationship among executive leadership of the organizations.
Communication	Effective communication before, during, and after the integration planning reduces resistance and reinforces good will among staff and supporters. Share as much as you can as early as you can with staff and stakeholders. You may feel you have to have it all together before sharing, but early awareness and involvement builds buy in and support.
Clear Integration Plan	Integration will result in re-assigning roles, creating new organizational structures and developing a new leadership model. Invest time in the creation of a critical path that clearly identifies key milestones, timelines, and accountabilities to keep everyone in the organization on track throughout the integration. While it is important to have a process that takes time to listen learn, don't allow the process to drag on. Cast the vision for the new integration model and steadily move towards it. Everyone in the process needs to see a landing place for a "new normal".
Brand stewardship	Because an organization's brand is often integral to its culture, it is important to develop a brand adaptation strategy during an integration.
Decision Making	A structured decision-making process and a realistic timeframe are required to provide due diligence to the planning process. Strike an integration team or committee that has representation from both organizations to facilitate a strong decision-making structure for the integration
Third-party facilitator/ Consultant support	An independent facilitator or consultant plays a major role in facilitating the planning processes and provides a neutral view of the entire process to flag early where cultural issues may be causing challenges, to ensure the project is well managed and moving forward to meet timelines and provides external knowledge from other contexts.



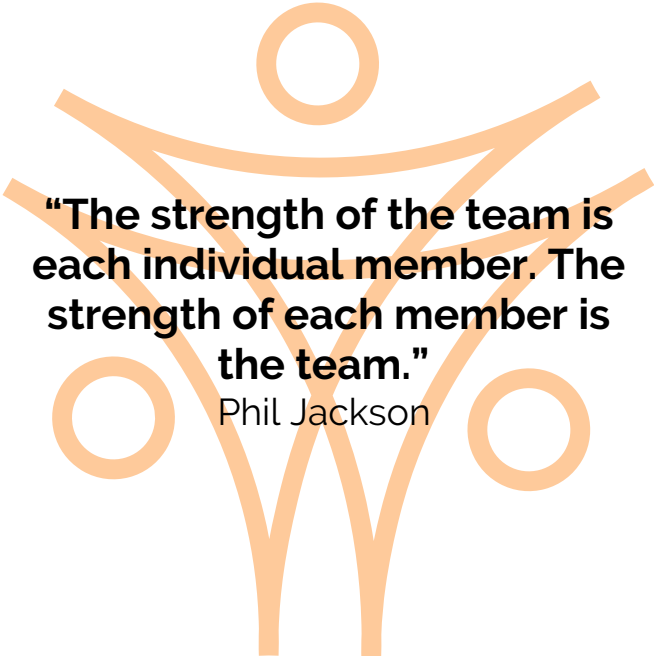
**"Coming together is a beginning, staying together is progress, and working together is success."**

Henry Ford

# Phase 3 - Implementation

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Front-line staff buy-in	Success of the daily operations is dependent on front-line staff, and therefore staff involvement in the integration increases likelihood of success.
Intentional Cultural Integration	Be aware of real or perceived power imbalances. Integration of divergent organizational cultures requires maintaining cultural identity of both organizations while forging new cultural values and norms. Decide early the principles you will use to resolve inconsistencies between organizations.
Adequate Resources	Implementation of an integration requires significant time as well as financial and human resources. Ensure the integration is properly resourced. It takes considerable dedicated time to integrate the culture of two organizations. Rarely can it be done from the corner of one- or two-person's desks.
Communication	The need for frequent and meaningful communication with stakeholders is critical to the implementation phase. Give reassurances where you can confidently stand behind them and don't make unrealistic promises. For example: if one of your values is that no one will lose their job, then communicate that, but don't promise that nothing will change in a process full of change.
Involvement and support of funders	Funders must provide financial support for the due diligence and integration costs that accompany an integration.
Leadership Commitment	Strong leadership should focus on positive change management throughout this phase.



**"The strength of the team is each individual member. The strength of each member is the team."**  
Phil Jackson

# Phase 4- Health Check

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Expansion and improved quality of services	Preservation of existing services or expansion of service offerings indicates a successful merger or integration has taken place.
Connection to Organizational Culture	Strong organizational identification of staff and stakeholders indicates a successful integration.
Intentional Review of Organizational Capacity and Structure	Organizations should examine whether operational efficiencies and economies of scale have improved with the new structure.
Adequate Time and Resources	Adequate time, financial, and human resources must continue to be devoted to adjusting to the new environment in this phase.
Leadership Commitment	Strong leadership is needed throughout the integration process, with an emphasis on organizational neutrality.

**"Good design begins with honesty,  
asks tough questions, comes from  
collaboration and from trusting your  
intuition."**

Freeman Thomas

