

# Four Phases of Organizational Integration



Our model of integration includes 4 key phases. Below we outline some of the key questions to ask and activities that happen in each phase. The amount of time spent in each phase will vary by organization.



## Exploration: Do You Want to Integrate

There are varied reasons that organizations begin on the journey of exploring potential integration with another organization. Regardless of the driver, there are many possible options on a continuum of integration ranging from informal cooperation to combining back-office functions to sharing an Executive Director or other positions to full mergers, takeovers or amalgamations. During this exploration phase, best practice research indicates the following activities should happen:

- Leadership/ board joint meetings with both organizations to determine if there is a compelling "Why":
  - explore organizational benefits/challenges of integration
  - Assess alignment of culture/values/ goals
- Separate sessions with each leadership/board team to review findings from joint session and identify deal breakers/ general agreement (or not)
- Determine which model of integration will be pursued. For example, merger of two organizations to form a new identity, one organization absorbs another, shared leadership and/or back-office support only.

# After the YES: Planning for Integration

Once a model for integration has been agreed upon, it is critical to develop a project plan that includes a thorough communication plan and how the message will be received by a broader audience. The project management plan should include:

- Review documentation & policies for compatibility
- Compare and contrast HR, finance, and governing policies to determine alignment and divergence and identify any areas of concern.
- Corporate culture conversations with various stakeholders to assess the values and culture of each organization at the team level
- Answer the "big" questions
  - What is the right timing to move ahead?
  - Confirm who will be on the implementation team
- Creation of integration Vision, and success measures
- Develop a change management and communications and high-level implementation plan
- Work with implementation team to determine Organizational Level Planning:
  - Policies & Procedures alignment
  - HR/ Org design
  - Culture/ team development
  - Plan for combining of assets if required

## Implementation: Organizational Change Occurs

This is the phase where all the discussions and planning become reality. Depending on the model of integration, this can be a simple or very complex change management exercise. Things to consider during this phase:

- Implementation of Change Management
- Organizational Level Planning
- Policies & Procedures
  - HR/ Org design
  - Culture/ team development – including new mission vision and values
  - Combining of assets

## Health Check: How Integrated Org is Doing

Every type of integration represents a change in how a project or daily work is delivered. In full integrations a new culture will be trying to find its way. It is important to be intentional to listen to how the new organization is feeling. This phase focuses on:

- Continued culture building
- Practical evaluation of the integration of culture and policies, procedures, organizational structures, and finances
- Following up on anything that was missed during the Implementation Phase