



Organizational Integrations

Phase 2 - After the Yes - Planning for Integration

This phase is about the who, what, when and how the organizations will move forward with the integration model selected. The end result is a well-designed implementation plan that creates engagement and ensures a clear path forward. This planning phase takes just as long as the implementation phase and is just as or more important to successful integrations.

WHO IS MAKING THE PLAN

Part of this phase includes thinking about having skilled and experienced people involved the planning and implementation of the integration. Organizations should:

- Include people with skills and experience in change management principles, project management and organizational integration;
- consider who else needs to have input in which stages of the plan;
- ensure representation from both organizations and a variety of stakeholder groups;
- identify who will be on the integration leadership team who will champion the integration project and develop the implementation plan

HOW TO MAKE THE PLAN

An important part of this phase is ensuring that stakeholders are engaged in providing information, building trust and strengthening relationships. This can be done through:

- Hosting stakeholder focus groups
- One on one meetings with organizational leaders and staff
- Joint Team meetings

WHAT IS IN THE PLAN

Some organizations choose to create a short-term integration vision. All organizations should take time to identify success measures for the integration, to determine what the integration process hopes to achieve and identify markers to know you have arrived.

The plan should consider:

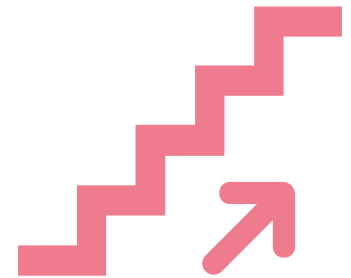
- Change Management Principles – including relationship, trust and team building; engagement and communication with internal and external stakeholders
- Realistic milestones and clear timelines
- Responsibilities and accountability
- Awareness of internal and external factors to ensure the appropriate time to move forward

Depending on the integration model selected the plan should also consider:

- assessment and review of policies and procedures, systems and structures in the areas of: mission, vision, values, human resources, governance, finance, operations.
- paying particular attention to ensuring common language and understanding

Outcomes for this phase:

1. An implementation team that will lead the integration
2. A complete implementation plan with timelines, budgets, and milestones
3. Staff who are engaged and excited by the prospect of integration



Questions To Ask in this Phase

1. What is the right time to move ahead with the integration?
2. Have we incorporated change management principles and strategies in all aspects of our plan?
3. Are we adequately engaging all stakeholders?
4. Who needs to be involved in what and when?



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