

Assessing A Potential Merger Partner

A successful merger – like in a successful marriage – depends on choosing the right partner. But doing that is easier said than done. To help assess a potential partner for a merger, ask yourself these questions:

- **HISTORY:** How well do you know your potential partner? Have you worked with them on a project before? How did it work out?
- **REPUTATION:** What is your potential partner’s reputation in the community? Will a merger enhance your standing – or at the very least not detract from it?
- **MISSION:** Are your missions aligned? Are you working towards similar goals?
- **VALUES:** Do you and your potential partner have similar values? Are these values apparent in the way services are delivered or programs are run?
- **ORGANIZATIONAL CULTURE:** How similar is the “feel” of the organizations and the way things are done in the office, in the board room, and with constituents?
- **COMMUNICATION STYLE:** Do you have similar communication styles? What is the communications mix with the public? What is the balance of print vs. social media? How formal – a tone does each use when communicating with the public?
- **TRUST:** Do you trust the potential partner? Have you had experiences with them that either built or eroded your trust with them? What were they?
- **ASSETS:** What tangible assets (e.g., new region, updated equipment, well-functioning administrative department) will the potential partner bring to the table that you could not secure on your own? What downsides (e.g., antiquated billing systems, outdated office equipment, inadequate technology) will the potential partner bring?
- **PUBLIC PERCEPTION:** How does the public view both organizations? Is there already some confusion in the mind of the public between both organizations? Would most be surprised that a merger was even being contemplated or assume it’s a good idea?
- **GUT CHECK:** How do you feel about the prospect of a merger? Are you excited? Worried? Nervous? Optimistic? Why do you think you feel that way?

