



JACKSON LEADERSHIP  
SYSTEMS INC.

## **SMART Early-Warning System™ for M&A Integration**

- **How do the Senior Team and Key Divisions of the company you are acquiring rank in terms of their Leadership, Strategy, and Process dimensions compared to industry benchmarks?**
- **Is there a good “fit” with your organization’s Leadership, Strategy and Process?**
- **Where are there “gaps” and how do you fill them?**

Although most would agree that mergers and acquisitions more often fail than succeed – often due to a lack of “fit” between the cultures and styles of the companies being integrated – there is a dearth of critical diagnostic tools, based on empirical research, to help determine whether your organization will successfully be able to integrate a major company or division you are acquiring or whether you are heading for trouble.

Dartmouth Tuck School Strategy and Leadership Professor Sydney Finkelstein and Jackson Leadership have developed the **“SMART Early-Warning System™”** to fill this critical void and help EVPs and SVPs of HR drive high-performance through a major acquisition integration.

The “SMART Early-Warning System™” is conducted through a confidential Web-based survey, completed in 12 minutes and filled out by the acquiree organization’s (1) Top Management Team and (2) Cross-Section of Key Organizational Leaders.

The “SMART Early-Warning System™” is based on 8 years of research that have uncovered the critical indicators that differentiate successful organizations who later fail due to M&As gone wrong from successful organizations who expand their dominance through doing M&A successfully. This new diagnostic tool comes out of recent follow-up research to the ground-breaking and Amazon #1 2003 Business Best-seller, Why Smart Executives Fail.



### **A “SMART Early-Warning System™” for M&A Integration:**

According to our research, most successful organizations fail because they fail to successfully integrate companies or divisions that they acquire. **The bigger the acquisition, the greater likelihood of failure.** In retrospect, countless organizations

For more information on a “SMART Early-Warning System™” for M&A Integration, contact Eric Jackson at [leaders@jacksonleadership.com](mailto:leaders@jacksonleadership.com) or +1.416.929.3838



**JACKSON LEADERSHIP**  
SYSTEMS INC.

who failed at M&A we interviewed and studied cited poor integration of **leadership, strategy, structure, or internal processes** between their company and the one they acquired, as the primary cause of problems. By contrast, "**SMART Organizations™**" who successfully and consistently grew their organizations through acquisition, managed this process of "fitting" and integrating differing leadership, strategic, and cultural styles very well.

**Jackson Leadership's "SMART Early-Warning System™" will help you know exactly what the "risk hot-spots" are to focus on as you oversee a major integration.**

Our survey diagnostic, filled out by those within the organization/division being acquired, will tell you what to focus your energy on. You will receive a detailed report on the acquired company's:

- **Leadership:**
  - **Executive Skill-Sets**
  - **Team Structure**
  - **Team Process**
  - **The Organization's "Leadership Funnel"**
- **Strategy:**
  - **Checking Strategic Assumptions**
  - **Strategic Alignment**
- **Process:**
  - **Organizational Structure**
  - **Clear Communication Channels**
  - **Engaged Culture**

The Report also suggests actionable recommendations for correcting areas of risk.

Your results will be presented individually, as well as compared to other highly successful organizations, which are part of Jackson Leadership's **SMART Organization™ Proprietary Database**. Therefore, you will know where the company/division being acquired stands on these dimensions on a percentile basis compared to others.

The process is straightforward with a quick turn-around time. Respondents only require 12 minutes to complete the survey. The report is scored immediately.

By implementing a "**SMART Early-Warning System™**" at the outset of a major M&A integration, Jackson Leadership will ensure that your legacy is one of having successfully achieved the major synergies envisioned by Senior Management to justify doing the deal.

**For more information on a "SMART Early-Warning System™" for M&A Integration including a copy of a Sample Report, please contact Eric Jackson at +1.416.929.3838 or [leaders@jacksonleadership.com](mailto:leaders@jacksonleadership.com) .**

For more information on a "**SMART Early-Warning System™**" for M&A Integration, contact Eric Jackson at [leaders@jacksonleadership.com](mailto:leaders@jacksonleadership.com) or +1.416.929.3838