



Corporate Merger And Acquisition Integration Project Checklist Template 2026

Pre-Merger Due Diligence & Strategy

Comprehensive review of financial, legal, and operational assets to validate synergy potential and identify hidden liabilities.

Project Name

Due Diligence Completion Deadline

Acquisition Type

- ☐ Horizontal Merger
- ☐ Vertical Merger
- ☐ Conglomerate Merger
- ☐ Asset Acquisition

Target Areas for Review

- ☐ Financial Statements
- ☐ Legal & Litigation
- ☐ Intellectual Property
- ☐ Human Resources
- ☐ IT Infrastructure

Strategic Synergy Objectives

Write something...

Confidentiality Agreement (NDA)

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Legal and Regulatory Compliance

Ensuring all antitrust laws, industry regulations, and contractual obligations are met during the transfer of ownership.

Regulatory Filing Deadline

Enter date...

Compliance Review Status

- ☐ Not Started
- ☐ In Progress
- ☐ Under Legal Review
- ☐ Completed

Signed Merger Agreement Documentation

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Legal Risk Assessment Summary

Write something...

Legal Counsel Approval

Organizational Structure & Talent Integration

Defining new reporting lines, managing leadership transitions, and executing employee retention and communication plans.

New Organizational Chart Lead

Write something...

Departments Involved in Restructuring

- ☐ Human Resources
- ☐ Operations
- ☐ Finance
- ☐ IT/Engineering
- ☐ Sales & Marketing

Integration Completion Deadline

Enter date...

Talent Retention Strategy Summary

Write something...

Updated Organizational Chart

 Upload File

Integration Complexity Level

- ☐ Low
- ☐ Medium
- ☐ High

HR Director Approval

IT Systems & Data Migration

Standardizing software stacks, migrating databases, integrating cloud infrastructures, and ensuring cybersecurity continuity.

Primary Database Name

Write something...

System Migration Deadline

Enter date...

Systems to be Migrated

- ☐ ERP System
- ☐ CRM Software
- ☐ Email & Collaboration Tools
- ☐ Human Resources Information System (HRIS)
- ☐ Inventory Management System

Data Security & Encryption Protocol Summary

Write something...

System Audit Report

 Upload File

Migration Complexity Level

- ☐ Low
- ☐ Medium
- ☐ High

IT Director Approval

Operational Process Alignment

Merging workflows, supply chain logistics, and standard operating procedures (SOPs) to achieve unified production/service delivery.

Standard Operating Procedure (SOP) Title

Write something...

Departments Affected

- ☐ Supply Chain
- ☐ Logistics
- ☐ Manufacturing
- ☐ Quality Assurance
- ☐ Procurement

Current vs. Proposed Workflow Documentation

 Upload File

Process Alignment Completion Deadline

Enter date...

Integration Priority Level

- ☐ Critical - High Risk
- ☐ Medium - Operational Impact
- ☐ Low - Minor Adjustment

Operations Lead Approval

Financial & Accounting Consolidation

Unified budgeting, tax integration, payroll synchronization, and the establishment of consolidated financial reporting systems.

Fiscal Year End Alignment Date

Enter date...

Projected Synergy Savings Target (\$)

Enter a number...

Accounting Software Systems Involved

- ☐ NetSuite
- ☐ SAP
- ☐ QuickBooks
- ☐ Microsoft Dynamics 365
- ☐ Oracle ERP
- ☐ Other

Audited Financial Statements (Target Company)

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Revenue Recognition Policy Harmonization Notes

Write something...

CFO Approval for Budget Integration

Brand & Cultural Integration

Managing brand identity transitions, unifying corporate values, and executing internal/external communication campaigns.

New Brand Identity Guidelines URL

Write something...

Communication Channels to Notify

- ☐ Internal Employees
- ☐ Existing Clients/Customers
- ☐ Vendors and Suppliers
- ☐ Investors and Stakeholders
- ☐ Social Media Platforms

Brand Rebranding Launch Date

Enter date...

Cultural Integration Strategy Overview

Write something...

Approved Brand Assets

 Upload File

Integration Status

- ☐ Not Started
- ☐ In Progress
- ☐ Review Phase
- ☐ Completed

Customer & Client Retention Management

Communicating changes to stakeholders, updating client contracts, and preventing churn during the transition period.

Key Account Contact Person

Write something...

At-Risk Client Segments

- ☐ Enterprise Clients
- ☐ Mid-Market Clients
- ☐ Small Business Clients
- ☐ Government/Public Sector

Client Communication Strategy Outline

Write something...

Client Notification Deadline

Enter date...

Updated Client Contract Amendments

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Retention Risk Level

- ☐ Low
- ☐ Medium
- ☐ High

Integration Lead Approval

Post-Merger Performance Monitoring

Tracking Key Performance Indicators (KPIs) against synergy targets and conducting post-integration audits.

Audit Review Date

Enter date...

Synergy Target Achievement Percentage

Enter a number...

Integration Milestone Status

- ☐ On Track
- ☐ At Risk
- ☐ Delayed
- ☐ Completed

Post-Integration Gap Analysis Notes

Write something...

Final Integration Audit Report

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Project Sponsor Approval

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🔧 Generate Sample Report