



# Mergers & Acquisitions (M&A) HR Checklist

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## Pre-Close HR Due Diligence

Reviewing the target company's HR practices, policies, and potential liabilities.

### Due Diligence Start Date

Enter date...

### Summary of Target Company HR Policies

Write something...



### Number of Active Employees

Enter a number...

### Target Company's Collective Bargaining Agreements (Yes/No)

Yes

No

### Copies of Key HR Documents (e.g., Handbook, Policies)

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### Pending Litigation - HR Related (Number of Cases)

Enter a number...

### Summary of Employee Demographics (Age, Gender, Ethnicity)

Write something...

## Integration Planning & Strategy

Defining the approach to integrating HR functions and aligning cultures.

### Define Integration Goals & Objectives

Write something...

### Identify Key HR Integration Priorities (Select all that apply)

- Compensation & Benefits
- Performance Management
- Training & Development
- HRIS Systems
- Employee Handbook/Policies

### Integration Approach (e.g., Parallel, Phased, Full)

- Parallel
- Phased
- Full

### Target Completion Date for Integration Planning

Enter date...

### Estimated Budget for HR Integration Planning

Enter a number...

### Outline Communication Plan for Integration Strategy

Write something...

# Employee Communication & Change Management

Planning and executing communications to employees of both companies.

## Initial Announcement Draft

Write something...

## Announcement Release Date

Enter date...

## Communication Channels Used

- Email
- Company Intranet
- Team Meetings
- All-Hands Meeting
- Other

### Key Messages to Employees

Write something...

### Employee Concerns Anticipated

- Job Security
- Benefits Changes
- Reporting Structure
- Company Culture
- Other

### Town Hall Meeting Date (if applicable)

Enter date...

## Compensation & Benefits Alignment

Harmonizing compensation structures, benefits packages, and equity plans.

### Salary Scale Adjustment Factor

Enter a number...

### **Benefit Plan Harmonization Approach**

- Full Integration
- Phased Integration
- Separate Plans (Short Term)

### **Effective Date of Salary Adjustments**

Enter date...

### **Equity Plan Alignment Strategy**

- Convert Existing Options
- New Grant
- Cash Settlement

### **Matching Contribution Percentage**

Enter a number...

### **Description of Benefits Changes**

Write something...

# Legal & Compliance Review

Ensuring compliance with all applicable laws and regulations throughout the integration process.

## Date of Legal Review Commencement

Enter date...

## Summary of Key Legal Risks Identified

Write something...

## Relevant Legal Areas Reviewed (Select all that apply)

- Employment Law
- Benefits Law
- Contract Law
- Data Privacy Law
- Tax Law

## Number of Legal Counsel Hours Dedicated to Review

Enter a number...

### Upload of Legal Review Documentation

 Upload File

### Overall Legal Compliance Risk Level

- Low
- Medium
- High

### Date of Legal Review Completion

Enter date...

## HR Systems & Technology Integration

Planning and executing the integration of HRIS and other HR technology platforms.

### Current HRIS System (Target Company)

- Workday
- SAP SuccessFactors
- Oracle HCM Cloud
- ADP Workforce Now
- Other

### Current HRIS System (Acquiring Company)

- Workday
- SAP SuccessFactors
- Oracle HCM Cloud
- ADP Workforce Now
- Other

### Description of Data Migration Strategy

Write something...

### Target Data Migration Completion Date

Enter date...

### Estimated Number of Employee Records to Migrate

Enter a number...

### Data Modules to be Integrated

- Core HR
- Payroll
- Benefits
- Talent Acquisition
- Performance Management
- Learning Management

### Data Mapping Documentation

 Upload File

## Organizational Structure & Reporting Lines

Defining the new organizational structure and reporting relationships.

### Describe the new organizational chart.

Write something...

### Reporting Structure Type (e.g., Functional, Matrix)

- Functional
- Matrix
- Direct
- Other

### Number of Management Layers

Enter a number...

### Explain rationale behind reporting line changes for key personnel.

Write something...

### Centralized vs. Decentralized HR Function?

- Centralized
- Decentralized
- Hybrid

## Contract Review & Transition

Reviewing and transitioning employment contracts and other HR-related agreements.

### Contract Effective Date

Enter date...

### Summary of Key Contract Terms (Target Company)

Write something...


### Contract Type (e.g., Employment, Consultant)

- Employment
- Consultant
- Independent Contractor

### Contract Renewal Period (Years)

Enter a number...

### Uploaded Contract Document(s)

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### Termination Date (if applicable)

Enter date...

### Notes/Comments on Contract Review

Write something...

# Employee Retention & Talent Management

Developing strategies to retain key talent from both organizations.

### Target Retention Rate (Key Talent)

Enter a number...

### Retention Incentive Programs Offered

- Cash Bonus
- Equity Grants
- Extended Benefits
- Promotion Opportunities
- Mentorship Program

### Rationale for Key Talent Identification

Write something...

### Retention Offer Expiration Date

Enter date...

### Retention Strategy Category

- Individualized Conversations
- Financial Incentives
- Career Development
- Cultural Integration

### Notes on Individual Retention Conversations

Write something...

## Post-Close HR Integration & Optimization

Ongoing activities to refine and optimize HR processes after the integration is complete.

### Employee Satisfaction Survey Score (Post-Integration)

Enter a number...

### Identified Areas for HR Process Improvement

- Compensation & Benefits
- Performance Management
- Training & Development
- Recruiting
- HRIS Utilization

### Date of Final HRIS Integration Audit

Enter date...

### Summary of Key Findings from HR Audit

Write something...

### Recommendations for Ongoing HR Optimization

Write something...

### Status of Integration Goals

- On Track
- Needs Adjustment
- Off Track