



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)

 Upload File

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)

 Upload File

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