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Managing the message during a merger

A merger might be good news for your clients, but how will they know if no one tells them? Mary Cloonan offers her advice on managing effective communications throughout the merger process



Picture this: a firm's biggest client is sitting in reception, waiting for her taxi following a meeting with the partner looking after her account. The partner has told her that the firm has just merger with another and she is pleased about it.

While booking her taxi, she says to the receptionist "That's great news for everybody, isn't it?"

The receptionist has found out about the merger by accident. Nobody has told

him what it will mean for him or for his job. He says he's not sure how it will work out; that it's hard to predict.

The client began the conversation with good news but left less sure. Nothing was said against the merger. Nothing needed to be.

What is actually being acquired

Behind every merger announcement, there are typically months of negotiation and difficult decisions. When the news becomes public, it deserves to land well as one of the few occasions when a firm will have news to share with every client all at once.

A firm acquiring another is acquiring its client relationships. These relationships do not sit in the files; they sit with the people who answer the phone, prepare the accounts, chase the information and ring the client back when they get in touch.

These people will very quickly start thinking about whether or not they will have a future in their firm post-merger. The deal's value travels with them.

Agree on shared messaging

Before anyone writes the merger announcement, the partners in both firms need to agree why they are coming together and what clients can expect as a result.

A merger can bring more specialists under one roof, deeper sector expertise or access to an international network, for example.

Declaring that clients will have access to “a broader range of services” is only useful if someone can explain what this really means for the client.

They will want to know whether their established point of contact at the firm will continue to work on their account, if fees will change and whether they can still expect a call back from someone who knows their business when they need it.

The clients of the acquiring firm also need attention. They may be wondering whether their familiar team will now have less time for them.

The press announcement needs something concrete – stronger presence in a specific sector, a new specialist team or a succession plan that protects continuity. Clients need more than the news that the firm has become bigger. They need a story with substance.

Tell your own people first

Employees should hear about the merger before clients, with as much clarity as possible about what it will mean for each of their roles.

The first question people will typically ask during a merger is whether they will still have a job. After this comes salary, reporting lines, whether they have to move and what to say when a client gets in touch.

Every person in the building will be asked about the merger within a fortnight of its finalisation. They need to know what to say.

Not every answer will be available. Explain what has been decided, what is still being worked through and when people can expect to hear more. Silence leaves them to fill in the gaps themselves.

Build one set of questions and answers, with people from both firms in the room, and assign someone to updated the Q&A as decisions progress.

Top clients hear directly from their partner

The partner who looks after the top clients should call each one before the formal announcement goes out, within the agreed confidentiality arrangements.

A client who hears about the merger from their own partner will receive it as news about their firm. A client who reads it in a press release will perceive it as news about someone else's.

This call is also a chance to listen to concerns and answer questions before the client draws their own conclusions.

Change everything on the same date

The website, LinkedIn page, Google listing, email signatures, the sign on the door and, most importantly, the name of the merger firm should all be changed on the same day in a coordinated effort across departments.

A client who checks two of these sources and discover different answers will start to wonder what else has not been sorted out.

When a smaller firm joins a larger one, there is often a conversation about keeping the old name visible until clients get used to it. A reference to the former name can help clients recognise the connection, ideally with a clear purpose and end date.

Using two names inconsistently will leaves client unsure of which firm they are actually with and employees unsure about how to respond to questions.

Merging businesses should, however, keep the old domains and email addresses working.

Many clients will have the old address saved in their phone and referrers will be working from a business card they picked up two years ago. Website redirects can lead clients to the correct address.

Websites are quicker to build than they used to be. The people content is what takes the time. Partner photographs and bios will need to be rewritten in a consistent style across the new, merged business.

Keep listening afterwards

A few weeks after the merger, ask staff what questions they are still being asked and have the relationship partners check in with key clients.

It's important to find out if:

- clients are reaching the right people;
- staff know where to take an unanswered question; and
- promises made at the time of the merger announcement have been actioned.

These conversations will allow the firm to put things right before uncertainty becomes dissatisfaction.

Give every audience an owner and a date

There are typically six groups that need to hear from both firms in a merger scenario: employees, key clients, the rest of the client base, prospects, referral sources and suppliers.

Each will need a message that answers their questions, a named person

responsible for delivering it, and a date.

The dates matter as much as the words. The people whose confidence the firm depends on should hear directly from that firm, in the right order – including the person on the front desk.

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