ACQUISITION SUPPORT

Integration Planning Checklist

For firms planning or managing a practise acquisition or merger

Most acquisition problems don't show up on the balance sheet. They show up three months after signing, when clients start leaving, staff get unsettled, and two sets of workflows that don't align begin causing real operational damage. Use this checklist as a working document — start before the deal closes and work through it systematically during the integration period.

Phase 1 — Pre-Acquisition (Before Signing)

1 **Due diligence completed on client base**
Concentration risk, fee levels, contract terms, renewal history
Done | In progress | Not started

2 **Staff structure reviewed**
Roles, contracts, notice periods, any retention risks identified
Done | In progress | Not started

3 **Systems and software assessed**
Compatibility with acquiring practise, migration requirements identified
Done | In progress | Not started

4 **Integration risks documented**
Mitigation plans in place for identified risks
Done | In progress | Not started

5 **Integration timeline agreed**
Clear milestones and named owners for each phase
Done | In progress | Not started

Phase 2 — Day One to Week Four (Immediate Transition)

6 **Client communication sent**
Clear, reassuring, signed by appropriate leadership
Done | In progress | Not started

7 **Staff communication delivered**
Honest, clear on what is changing and what is not
Done | In progress | Not started

8 **Key client relationships assigned**
Named relationship owners in the acquiring practise confirmed
Done | In progress | Not started

9 **Interim workflow arrangements documented**
How work will be processed during the transition period
Done | In progress | Not started

10 **Compliance handover completed**
AML, engagement letters, data protection records transferred correctly
Done | In progress | Not started

Phase 3 — Month One to Month Three (Integration)

11 **Staff roles in the combined practise confirmed**
Roles communicated clearly to all team members
Done | In progress | Not started

12 **Systems migration completed or on track**
Progress against agreed timeline monitored
Done | In progress | Not started

13 **Workflow and process alignment completed**
Combined practise operating on consistent SOPs
Done | In progress | Not started

14 **Client retention monitored**
Any early signs of attrition identified and addressed proactively
Done | In progress | Not started

15 **Team culture actively managed**
Formal and informal integration steps taken
Done | In progress | Not started

Phase 4 — Month Three Onwards (Post-Integration Review)

16 **Financial performance reviewed**
Combined practise results assessed against pre-acquisition projections
Done | In progress | Not started

17 **Client satisfaction assessed**
Formal or informal review of key relationships completed
Done | In progress | Not started

18 **Staff satisfaction and retention reviewed**
Any issues identified and addressed
Done | In progress | Not started

19 **Governance structures documented and operational**
Oversight structures of combined practise in place
Done | In progress | Not started

20 **Integration formally closed**
Lessons documented for future acquisitions
Done | In progress | Not started

If you are planning an acquisition or currently managing an integration and would like structured support, Practise Vitality provides hands-on guidance from pre-acquisition planning through to post-integration review. Book a discovery call at **practisevitality.ie/contact**