Best Practices

- Plan, plan, plan...
- Do not underestimate source of customer anxiety e.g. account number changes, new debit cards , seeing the same staff
- Turn negatives into positives and make change palatable for every customer no matter the situation
- Understand the link between data mapping and the customer experience
- Speak in plain language to your employees and your customers
- Don't overlook employee communications and establish feedback and FAQs channels
- Deliver on promises and stated deadlines
- Ensure each customer feels special and respect the institution that they selected as "my bank"
- Understand the changes you'll face after the conversion as one organization, one culture, one value proposition
- Develop a play book; you will do this again and it is nice to have a quick reference guide
- Debrief with your business line partners on what worked/did not work at each stage of the integration; make a note of pain points for customers and staff to avoid the next time around
- Data conversions usually happen on long weekends; avoid holiday crunch time
- Have a Plan B on Day 1 just in case
- Communicate early and often with transparency and heart
- It is a marathon not a sprint; do not burn your people out early on in the process
- Find strong partners
- Contact us…we are happy to share more

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Five Key Take-Aways

1. Communicate early and often. Be transparent.

2. Recognize the impact on employees and customers and how a strong communication program can minimize attrition before and after a merger

3. Help employees and customers manage merger-related change with a multi-channel communications approach; don't forget the value of face to face conversations

4. Know the merger milestones and how communications play a part in achieving them

5. Build a communications road map and stick to it