

CASE STUDY

Change meets exhilaration: Aligning culture, operations, and communications for successful post-merger integration

<https://www.chartis.com/client-results/change-meets-exhilaration-aligning-culture-operations-and-communications-successful>

The Client Challenge

Having partnered with a major national non-profit health system, a century-old regional health system was facing a long list of imperatives to ensure a smooth integration, successful partnership, and transition from a joint-CEO model to single CEO.

Under pressure to achieve aggressive long-term strategic goals, system leadership also wanted to ensure that pre-merger commitments and the promise of the partnership were fulfilled. Meanwhile, the communications team wanted to evolve toward a more strategic role in helping inform and communicate system strategies.

Potential Pitfalls of Post-Merger Integration:

- Cultural misalignment
- Lack of clarity among employees and physicians about strategic goals
- Community concerns about quality, access, and cost
- Disjointed leadership transition
- Resentment and negative headlines due to the above

Navigating to Next: The Solution

Jarrard Inc. worked with system leadership to identify challenges for post-merger integration. Concerns about cultural misalignment topped the list. We then solicited input from across the organization and community through interviews, townhalls, and market research. We compiled the resulting input for review by the co-CEOs. These participatory tactics created a useful pipeline of feedback without making the co-

CEOs beholden to a litany of differing perspectives.

Following the review, we worked with system leadership to prioritize initiatives needing communication and determine the materials necessary to do so effectively. We focused on helping develop internal communications strategies, while also supporting and assisting in creation of the materials themselves. A new microsite served as a repository for these materials to ensure consistency in all communications. As the planned leadership transition approached, we worked with both CEOs to develop messaging that highlighted the intentionality of the process, honored the outgoing CEO for his decades of service, and positioned the new solo CEO for success.

Navigating to Next: Key Components



DEFINE THE WIN

Identify milestones and measurable benchmarks for a successful integration



REVIEW THE LANDSCAPE

Collect feedback from all stakeholders on gaps, barriers, and concerns



PRIORITIZE GOALS

Triantafyllidis and stakeholder concerns with system goals to identify critical communications needs



CENTRALIZE THE MESSAGE

After creating communications materials, develop a single source of truth to help the messengers stay organized



CLOSE THE LOOP

Report back to stakeholders on what was heard, what decisions were made, and the timelines for implementation

Client Impact

The year-long process of integration and leadership transition led to a renewed focus on culture for the system, prioritizing cultural imperatives in tandem with operational strategy. The leadership transition was well-received, with significant positive media coverage. The outgoing CEO stated the process and experience was challenging, yet, in a way, “exhilarating.” The work elevated the role of the communications team, enabling it to become a regular voice in strategic planning discussions. With those early integration steps accomplished, the system now has a foundation to build upon for other change management and achievement of longer-term operational goals.

Closing a deal must be followed by ongoing, holistic communications to facilitate cultural alignment and operational integration:

Outgoing CEO

felt **validated and celebrated**, eager to take on his new corporate role

Incoming CEO

felt **empowered and supported** across the organization

Communications Executive & Team

felt **successful and motivated** to cement their seat at the table

How We Are Making Healthcare Better

The critical step at the beginning of any integration process is to go deeper than just identifying barriers by clarifying why those barriers exist so that root causes can be addressed. Jarrard focuses on listening to all stakeholders to understand these gaps and discover areas of unseen or unexpected alignment. ”

Isaac Squyres

Next Intelligence

Cross-organization cultural alignment requires:

- Acknowledgment of and respect for existing norms, processes, and leaders—even if they must change.
- Two-way communication to hear concerns and to provide clarity about how the new relationship affects each stakeholder.
- Regular, consistent communication to avoid surprises about initiatives taking place.

Our services

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LEARN MORE ABOUT THE AUTHOR



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