

# Accelerating Value: Navigating the Human Side of M&A

## *Post-Event Summary*

Hosted by:



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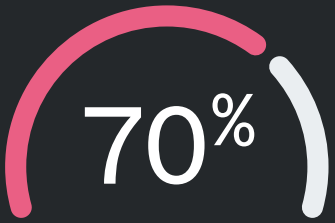


**Catherine Heritage**

Global VP Culture, Talent & EDI, Tate & Lyle



To open, we explored how the human side of integration is often underestimated yet plays a crucial role in the success or failures of mergers and acquisitions.



Successful Deals  
Reported a **Proactive  
Approach** to Managing  
Cultural Differences <sup>1</sup>

**People are more committed to changes that they help create.**

The most successful integrations quickly make the new company's strategy real and tangible, knowing change must be experienced to be understood.<sup>2</sup>

The success of integrations hinge on the ability of thousands of individuals to embrace new teams, tools, structures, and ways of working.

1. Willis Towers Watson. (2021). \*M&A in a Transformative Age: 2021 and Beyond\*. Willis Towers Watson. Retrieved from <https://www.willistowerswatson.com/en-US/Solutions/mergers-and-acquisitions>
2. Oreg, S., Vakola, M., & Armenakis, A. (2011). Change Recipients' Reactions to Organizational Change: A 60-Year Review of Quantitative Studies. The Journal of Applied Behavioral Science, 47(4), 461–524

# We shared 5 common integration pitfalls, we frequently see in integration

## Common integration pitfalls



- 1 Leaning too much on first impressions of synergies with the other company
- 2 Assuming that only the acquired company has to change
- 3 Over-relying on processes and systems as levers for integration
- 4 Believing that inspiring communications alone will drive adoption of the future direction
- 5 Working against, rather than with, resistance, uncertainty and fear

## Proactive moves to make



- Go deep in understanding and addressing potential differences and points of friction
- Engage teams from both organizations to shape the future – authorship is ownership
- Place equal focus on creating shared purpose, language and ways of working for the combined organization
- Help people to see themselves in the new organization and practice shifts that the future will require of them
- Treat resistance as engagement while drawing out what is left unsaid

# Our panellists shared their integration experience, & first-hand perspectives on our pitfalls

## Key points:

- 1. Culture is not absorbed - it's co-created.**  
Culture won't integrate itself. Leaders must actively shape how values, behaviors, and mindsets evolve across legacy teams. Start early, involve everyone, and measure progress with purpose-built KPIs.
- 2. Leadership alignment isn't optional - it's foundational.**  
Deals succeed when leadership speaks with one voice and models the change. Misalignment breeds confusion, slows decision-making, and erodes trust.
- 3. Middle managers turn strategy into culture.**  
Often overlooked, this layer is critical for translating vision into everyday action. Equip them with clarity, language, and support to navigate resistance and lead through ambiguity.
- 4. Integration should be designed, not defaulted.**  
Avoid the temptation to over-engineer. Focus on "minimum viable integration" to be intentional, maintain agility and prevent burnout.

[Click here to see some of the questions that remained unanswered following our session](#)

## Parting words of wisdom:



### Catherine's advice:

- **Plan relentlessly:** communicate clearly and consistently at every stage.
- **Choose the right partners:** Work with advisors who align with your culture and can support people-focused integration work authentically.



### Kelly's advice:

- **Question the assumption that delayed integration is safer:** communicate clearly and consistently at every stage.
- **Co-create the roadmap:** collaboratively build the integration plan to maintain momentum and avoid stalling progress



## We'd love to continue the conversation.

If you would like to discuss in more detail or find out more about how BTS supports the world's leading organisations with strategy alignment, culture transformation and embedding change at scale, please don't hesitate to reach out to:



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# Strategy made

**personal**



# Unanswered questions from the event

There were a few questions that we did not have time to cover, thoughts from Catherine & Kelly below:

- **“Curious if Catherine during the due diligence really had the time to investigate the organizational talent, HR policies, cultural norms or was it rushed along by the investment teams?”**
  - *We spent time collecting data and insights, that might help understand talent challenges like retention and, even during DD, took time to create an early outside-in view through publicly available information. We did what we could and were able to be quite directive about the information we wanted to see, which was helpful.*
- **“If possible, I'd like to hear more about the Op model work that preceded the Org design. So often a step that gets overlooked as leaders just want to get on and 'sort' their bit. How long did that Op model work take and how did you approach it?”**
  - *In terms of approach – informed by org design, the two companies had different operating models and there was quite a degree of complexity caused by different commercial models. We looked at the fundamentals of the combination and what we wanted it to achieve strategically and commercially, then looked systematically at the best way to deliver that. The Organisation Design is the activation of the operating model, so clarifying the key elements of the TOM first is critical.*
- **“How do you get a sense of employee culture from both organizations if employees are being laid off based on titles alone (duplications) while the role and impact may be different?”**
  - *This was not the approach taken, instead there was a layered design process with transparency and consistency as key elements (this was reflected in the overall approach to the culture integration work). We identified the critical capabilities and accountabilities required in each part of the organisation and designed roles to reflect that. We also defined and implemented a fresh job architecture for the combined org, to make understanding role titles and accountabilities simpler, bringing consistency across job families.*
- **Did the panellists harmonise Ts and Cs and if yes, were they transparent about looking at this / sharing milestones with colleagues?**
  - *Difficult to comment here as we are in the middle of the process, but yes, harmonisation is expected and yes, we will be as transparent as we possibly can be.*
  - *It depends on the type of acquisition, but yes, we are typically transparent, even if we harmonize over years*

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