

A CARRIEREHR CHECKLIST

Post-Acquisition People Checklist

DAY 1 THROUGH WEEK 1 · TRUST AND KNOWLEDGE

- ☐ **Meet the Leadership Team & Key Employees** This is more than an introduction. Listen more than you speak. Who's Key? It's your job to find out the reality of what roles make the business successful, and who's riding on the shoulders of others.
- ☐ **Assess Operational Needs** A strong percentage of your operational issues are likely rooted in people issues. Identify and prioritize.
- ☐ **Review Financials** You know where the money should be. Get some payroll reporting and start a deeper dive on where you're investing your salaries. Does it add up to the value areas?
- ☐ **Compliance Requirements** Request all people compliance information. If they don't know or don't have time, set up to get an audit.
- ☐ **Communicate With Employees** This is the most critical piece. Be as visible as possible to all levels. Tell them candidly that you'll be listening, asking questions, and seeking to understand as much as possible. Tell them you'll communicate all along the way, then make a plan to do it.

MONTH 1 · ACTION PREPARATION

- ☐ **Connect 1:1 with every employee** Key employees may get more time, but every employee gets a touchpoint with you and a chance to share their personal concerns. Take notes, let them know you're gathering info.
- ☐ **Categorize your notes** Compliance, Efficiency, Leadership are categories of challenges that can get you started. Put a star next to anything you consider low hanging fruit.
- ☐ **Establish regular team meetings with leaders** These are not complaint sessions or a place where you have all of the answers. Establish lines of communication and problem solving between the players.
- ☐ **Low Hanging Fruit** By week 3 you should be able to make 1 small positive change each week until they are all covered. Do not wait, do not fear change will be uncomfortable. Show you are listening and that you take action.
- ☐ **Begin Internal Messaging Strategy** Communicate and over communicate. Tell them about your experience each week in the first 4 weeks. Explain what you've learned, share where you see opportunity, praise the areas that are going well. This is a trust building activity that won't continue forever, but these early strides build you a foundation for faster long term decision making.

NEXT 60 DAYS · OPTIMIZE AND TAKE ACTION

- ☐ **Develop a 6 month plan** You're already on track with low hanging fruit, what about the bigger stuff? Prioritize and decide what is feasible over the next 6 months.
- ☐ **Address any staffing issues** Any pieces of the business not working and it's staffing related? Assess roles to understand what's really needed and determine any new adds, role eliminations, and replacements.
- ☐ **Compensation & Benefits** Even if this didn't show up on the biggest employee concerns, proactively audit your compensation for misalignment. It's an easy miss and an easier fix when you're ahead of any misalignment.
- ☐ **Strengthen Leadership** Now that you've seen a month in action, you're in a better position to share your expectations on leadership and the culture you want to see curated. Be clear with your leaders.
- ☐ **Communicate Progress Regularly** Yep, keep doing it. You'll now move on to a monthly report about your experience for at least 3 months while uncertainty still exists. Still communicate in between for any major changes.

The first 90 days set the tone for everything after. Work this list in order and you'll know more about your business by day 60 than most owners learn in a year.

NEXT STEP

Not sure what to tackle first?

Send me where you're stuck and I'll tell you what I would prioritize, and what can safely wait.

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