

POST-M&A CLIENT INTERVIEW

Sample Questions



When working through a successful M&A integration, there are many internal factors to consider and decisions to make related to personnel, systems, culture, core business, etc. One aspect that is not often considered is the impact to the newly acquired clients and concerns they may have about the leadership change.

To set the stage for a mutually beneficial and enduring relationship with these new clients, it is important to learn about their experiences with the products and services they have received previously. It is also valuable to understand if they have any preconceived notions or biases about working with your firm that might impact your long-term success with them.

Additionally, clients of a recently acquired firm may have concerns that their projects will be lower priority for the new firm or that the transition to a new leadership team will be disruptive to their work or project(s).

Best practices for engaging and retaining newly acquired clients.

At the very minimum, the new firm's leadership should reach out personally to make a friendly introduction, establish rapport, and inquire about new clients' objectives and broader mission. Further, having Customer Follow Up, Inc. as an independent third-party interview them, will likely uncover concerns, suggestions, and insights that, if responded to, will enhance that relationship and provide the actionable steps to enrich your firm overall.

Post-M&A interviews allow you to:

- ▶ Quickly establish relationships with new clients.
- ▶ Instill confidence in new clients that their work or project(s) will be well managed.
- ▶ Identify new clients' specific concerns and address or resolve them.
- ▶ Retain more clients.

Sample question topics for Post-M&A client interviews:

- Were they notified that the acquisition took place?
- Did someone from the new firm's leadership team personally introduce themselves?
- Do they have any questions or specific concerns about the state of their project(s)?
- Do they know who to contact if they have concerns or questions about their project(s)?
- Do they have a need for additional support beyond what they currently have?
- What is their perception of the new firm and its reputation?
- Is there anything they want the new leadership to know about their experiences with the previous firm?