

## Case studies: HR due diligence and readiness

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### Pre-merger benefits diligence and integration planning

#### Situation

A PE-owned health care provider to vulnerable patients was in the midst of acquiring three competing organizations while simultaneously trying to improve the retention of their 6,500+ full-time employees, enhance the competitiveness of their healthcare programs, and successfully renegotiate with key unions — all while trying to reduce their benefits spend by 5%.

#### Solution

As the trusted benefits advisor prior to the HR transformation, we recognized the critical need to achieve a balance between synergy creation, talent retention, and sustainable results through diligence and integration planning activities. To achieve these goals, we designed customized programs to bridge existing benefits gaps, establish health management programs, optimize vendor partnerships, and leverage data analytics to help executives make more informed decisions and deliver better outcomes.

#### Impact

- Incurred actual costs were \$1M under budget for each of the three years
- Integrated two additional acquisitions during this same time period
- Achieved targeted workforce retention rates
- Reduced medical use trend from 8% to 3%



**\$5.5M**

in savings attained in the first year with sustainable savings of \$18M over the first three years

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### Strategic diligence, integration management, and culture

#### Situation

A large financial services organization acquired a smaller software company to further their strategic expansion into global and commercial markets. They turned to our team to support the HR diligence, the transition of all acquired employees across 14 countries, the integration of key processes and technologies, and the development of a culture strategy to better support the business and ensure a consistent global employee experience.

#### Solution

Through due diligence and early-stage facilitation of a deal objectives workshop, we developed and managed a phased integration roadmap, established a integration management office (IMO) to provide governance, structure, and project management processes, and helped define the future-state culture by conducting a cultural lens assessment, including interviews with 15 executives and a survey to 230 officers, which resulted in a culture change strategy and implementation plan.

#### Impact

Our early-stage identification of opportunities, thoughtful planning, and hands-on integration leadership ensured all aspects of the organization's needs were appropriately considered, including:

- Identified synergies and opportunities across people, process, and technology
- Integrated HRIS, payroll, and benefits for all U.S. employees
- Integrated employees and functions across 14 countries within 12 months
- Created a future-state culture statement based on desired cultural attributes
- Established a Culture Council and Culture Teams to drive ongoing change



**90-day**

rolling change and communications plan was developed supporting all workstreams

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Learn how our HR due diligence and readiness solutions can enable a clear path to post-deal optimization. Contact us at **1 866 355 6647** or [talktous@buck.com](mailto:talktous@buck.com) to get started.

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