



SCALE  
IDEAS &  
IMPACT

# Building a Merger Integration Team through Networks & Collaborative Practices

## CASE CONTEXT

A financial leader plays a key role in a large merger. He builds the team and network to handle the deal, from negotiation to integration. He invests in building trust within his team and among colleagues from the other company to ensure transition on a large scale.

Marty runs the finance function for a major product line at a telecommunications powerhouse, having held independent contributor and project leader roles over the past 15 years. His work touches every customer account and is affected by larger company strategies and finance policies. He experienced a major change and role expansion when the company acquired a competitor. As part of the transition team, Marty was immersed in the details of a high-visibility project for a year and a half. “All eyes were on us to see if we were going to be able to make it happen. Senior leadership was involved all the way through.”



MALE

Level: FIRST-LEVEL LEADER

Industry: TECHNOLOGY

Because of the importance of the work and commitment required, Marty—and other leaders heading up segments of the acquisition—staffed their teams carefully. “I made sure that all the folks on my team were very well vested, had a lot of tenure with the company ... I wanted to have a vast network at my disposal. You never know what kind of questions are going to come up ... As we interacted with the other company, so many questions started to unfold outside of our area of expertise. But because of who we brought to the table, if we didn’t have the answer, we had a resource that we could easily reach for because we were networked in.”

## HIGH-PERFORMING LEADERS LEVERAGE NETWORKS TO DO 5 THINGS

Based on 20 years of research in more than 300 organizations, we know that the quality of your professional relationship play a significant role in your success. We have extended this research to describe the way high-performing leaders leverage their networks to: Innovate, Execute, Scale, Thrive and Adapt.

Marty’s team was drawn from several locations with different specialties and assignments. As the merger stages progressed, he knew the team would need to draw on each person’s expertise. Everyone would need to raise concerns, ask questions or seek help. Team meetings were held every other week via video calls. “It helps to see each other, to interact face-to-face ... It’s a more engaging environment and instills a deeper level of commitment from the team members.” Marty had each person contribute, one at a time, then anyone could add on or offer help. “The process drew out those folks who are instrumental, but more introverted ... It was very collaborative, very open. That kind of environment takes a while to build; you don’t get that just day one. That takes trust ... Once the team was together for a little bit and had some successes, they trusted each other and valued each other’s opinion a little bit more.”

Marty also held weekly one-on-one calls or meetings with every team member to further that trust. “I needed them to share openly with me. That committed time really mattered ... I would always start out explaining, *This is your time. Use me for whatever you will ...* At the beginning, it was mostly just a download of what they’ve been working on ... Now it’s, *Hey, I’ve got this problem, I need some help or insight, or I’m struggling ...* I want them to know they have freedom to fail, but to fail fast and let’s figure it out ... And that helps build trust, too.”



Marty also believes in small gestures that show recognition and appreciation. Handwritten notes—sometimes mailed to their home—and stopping by to check how things are going with team-mates personally are ways he expressed his appreciation to the team. “I wanted them to know their efforts and time commitment mattered.”

As Marty and the team gained trust with each other, Marty was better able to manage the workload and collaborative demands. He could assign tasks or pair people in ways that suited their skills and interests—which was especially important once the team was interacting directly their counterparts in the other company. He was confident in their abilities and that they would know when it was necessary for him to weigh in or intervene. “I have to give my team a lot of kudos—whenever they reached a certain point of resistance or saw they needed some senior help, they would always come back to me and say, *Hey, we need you ...* And that’s my job. They ask for something, that becomes one of my top priorities. That’s where I would plug in and help out.”

Managing the team and the external relationships involved numerous collaborative demands. “There was always some push and pull ... It was important to not just go in to a meeting and say, *This is the way it is ...* It was important to take the time where you needed it and offset the simpler things.” He worked to keep the team clear about when conversation was needed versus when email or instant message was sufficient. Online collaborative workspaces were also essential for saving time, keeping track of the project or document changes and allowing transparency and input in real time.

Marty sees his team’s development as a valuable outcome of their work. As they continue to integrate the acquired company, they are becoming equipped to manage future complex projects. Much of the learning for Marty is tied to the human element of change: “A key lesson for me is to spend more time building the relationships and high-level business requirements, rather than getting down into the details too soon. And, given the timeframe from idea to success, we should map out some deliverables or milestones that the team could celebrate. You need to feel like you are achieving something, not just part of a giant thing that is not all in your control.”

## Network Insights

- **Staff teams with the network in mind.** When possible, employ your network to help build a team that has the expertise and work ethic you need and far-ranging networks themselves. Expanded and non-insular network connections can be leveraged to support and scale work.
- **Meet face-to-face or use virtual tools in ways that enable richness in team interactions—especially early on.** Create a context where it is safe to fail and fail fast so that team members bring challenges and begin to help each other.
- **Systematically build in 1:1 meetings that allow relationships and trust to form.** Initially, these interactions will be more structured and on-task. As you build trust, sessions become more focused on problem solving, co-creating and off-task connections.
- **Leverage engagement and trust to manage workload.** Your knowledge of others’ abilities and interests allow you to push collaborative demands into the team. This helps develop them and ensures you are adding value in the way you should as leader.

## Driving Down Collaborative Overload During Surge in Demands

1. **Create time for reflective work.** Block time in your calendar or work at off times—and protect the space.
2. **Be efficient with email.** If you can answer something in less than one minute—and it helps others continue work—then do so. If not, come back to it.
3. **Don’t do it all on your own.** Look at the work differently. Break requests into chunks and engage others who could benefit from the experience or visibility.
4. **Use systematic team meetings to help members be aware of expertise and challenges.** Create a context of trust, so they are willing to discuss challenges and help each other, rather than funneling everything through you.
5. **Insist on 1:1s with team members.** This builds engagement (by helping them see the way their work contributes) and trust (by handling bad news well, helping them with difficult items and connecting with them on professional and personal aspirations).
6. **Leverage appropriate collaborative technology.** This avoids excessive emails, ensures document control and fosters feelings of ownership as people co-create.

### ABOUT THE RESEARCH & ROB CROSS

Building on 20 years of research with more than 300 organizations, the Network Leader Research Project seeks to understand the approach and strategies that enable certain leaders to consistently achieve peak performance. The research includes 160 in-depth interviews conducted by Rob Cross, a Professor of Management at University of Virginia’s McIntire School of Commerce. The Connected Commons is currently focusing its research on leadership effectiveness, talent optimization and organizational alignment and change—three areas where network insights can clearly drive performance. For more information visit [www.connectedcommons.com](http://www.connectedcommons.com) or email Rob at [rlcrossjr@gmail.com](mailto:rlcrossjr@gmail.com).