

## Integration Check List

The startup founders should work with the company to develop an integration plan. While the details of any plan will be dependent on the specifics of that deal, I have included a checklist below of the common items that should be considered.

### 1. People

#	Item	Who is responsible?	Completion date
1	Will the current team structures remain intact?		
2	Org chart of new reporting structure.		
3	Short-list of the teams that will be changed.		
4	Short-list of individuals whose manager has changed.		
5	Short-list of individuals who will be departing.		
6	When do these change take place?		
7	Is there any new equipment for team members?		
8	Any training required for team members?		

### 2. Product

#	Item	Who is responsible?	Completion date
A	Who "owns" product integration plan ( on startup side)		
B	Who "owns" product integration plan (on company side)		
C	What are the major milestones?		
D	What are the key dates?		

### 3. Processes

#	Item	Who is responsible?	Completion date
A	Process in		
B	Short list of processes that need to change?		
C	Who owns changes in Finance		
D	Who owns changes Sales		
E	Who owns changes Product development		
F	Who owns changes HR		
G	What are the main milestones?		
H	What are the key dates?		
I	Who has the responsibility to approve changes?		

#### 4. Systems

#	Item	Who is responsible?	Completion date
A	New logins and accounts for the company systems?		
B	Short list of systems that need to be integrated/migrated?		
C	Who owns changes in Finance?		
D	Who owns changes Sales?		
E	Who owns changes HR		
F	What are the main milestones?		
G	What are the key dates?		
H	Who has the responsibility to approve changes?		

#### 5. Reporting

#	Item	Who is responsible?	Completion date
A	How will progress be measured?		
B	What format do any reports need to take?		
C	Who is responsible for producing these reports?		
D	When do these reports need to be produced?		
E	How will team morale be gauged?		
F	How will progress be measured?		
G	What is the key "north star" metric?		

#### 6. Due diligence remediation

#	Item	Who is responsible?	Completion date
A	List of items identified during due diligence that need to be remediated?		
B	Who is responsible for addressing each item?		
C	When does the remediation need to be completed by?		

#### 7. Facilities

#	Item	Who is responsible?	Completion date
A	Does the team need to move office?		
C	Do team members need to be assigned desks?		
E	Do team members need badges/building access?		

**8. Other**

#	Item	Who is responsible?	Completion date
A	What actions need to be taken on security?		
B	What actions need to be taken on compliance?		
C	What actions need to be taken with Tax?		
D	Anything else that should be considered?		