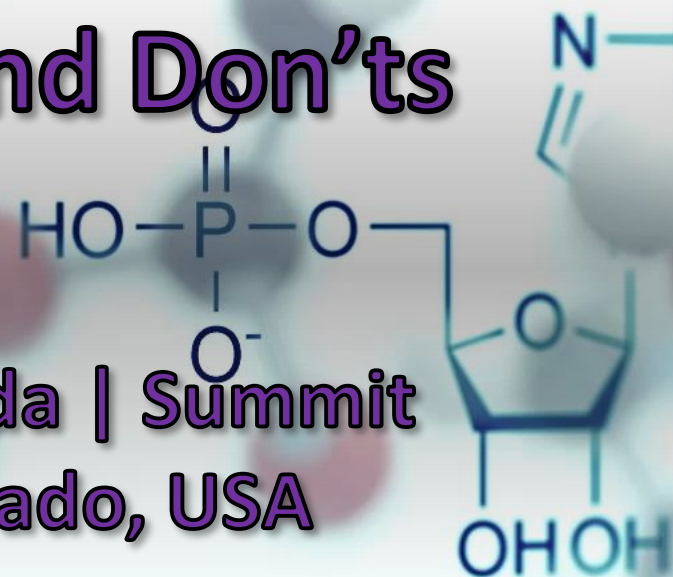


Bio-Pharmaceutical Industry Leadership's Guide to Post- Acquisition: Dos and Don'ts

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Disclaimer

- The views expressed in this presentation are solely my own and do not express the views or opinions of my employer.

Introduction (Why this matters)

- Integration success depends on people, process, and culture—not just the deal.
- Leadership choices determine how uncertainty is experienced.
- Goal: practical steps for smoother, compliant integration.





Summit is Acquired by Lotus



What are the top 3 largest mergers/acquisitions in biopharma (ordered from highest transaction dollar amount to lowest)?



Which area is the biggest challenge post-acquisition in your experience?

Scope & Assumptions



Post-acquisition integration in regulated biopharma/clinical environments



Assumes deal is signed/closed; focus is people/process/systems



Timelines vary by function; validation and inspection readiness influence pace



**In one word: what do teams
feel most after an
acquisition?**

The Leadership Imperative

- Uncertainty increases: roles, reporting, culture, expectations
- Leadership shapes whether uncertainty becomes destabilizing or constructive
- Integration is sustained change: communication, empathy, adaptability



The Merger – The Office US



DO #1: Communicate Clearly and Early

- Explain the rationale and intended benefits
- Say what is known and what is not yet decided
- Maintain a single source of truth (FAQ/hub)
- Create a predictable communication cadence



What's one thing you would put under: "What won't change?"

DO #2: Build and Invest in Relationships

01

Create cross-company working groups/task forces

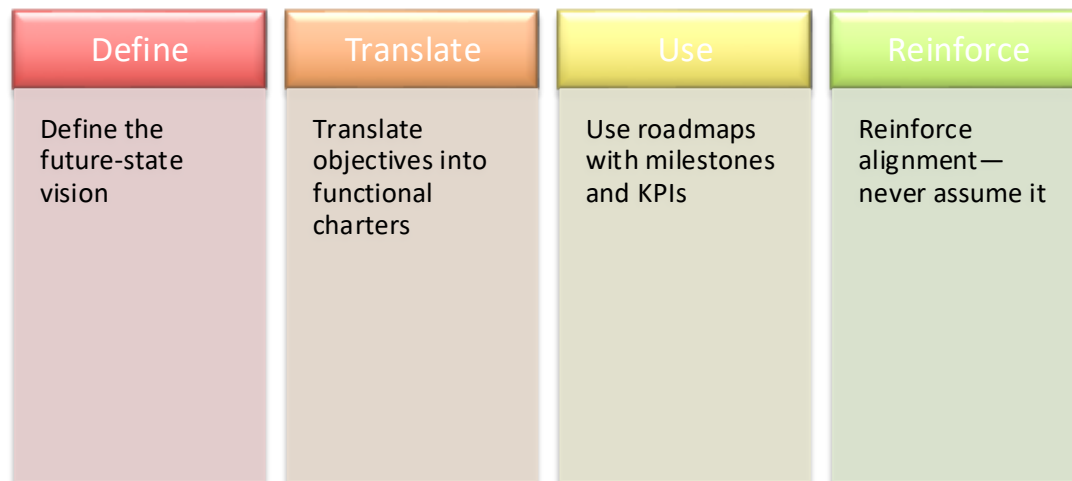
02

Invest in onboarding and cross-team workshops

03

Address 'us vs. them' early with shared goals

DO #3: Set and Reinforce Clear Goals

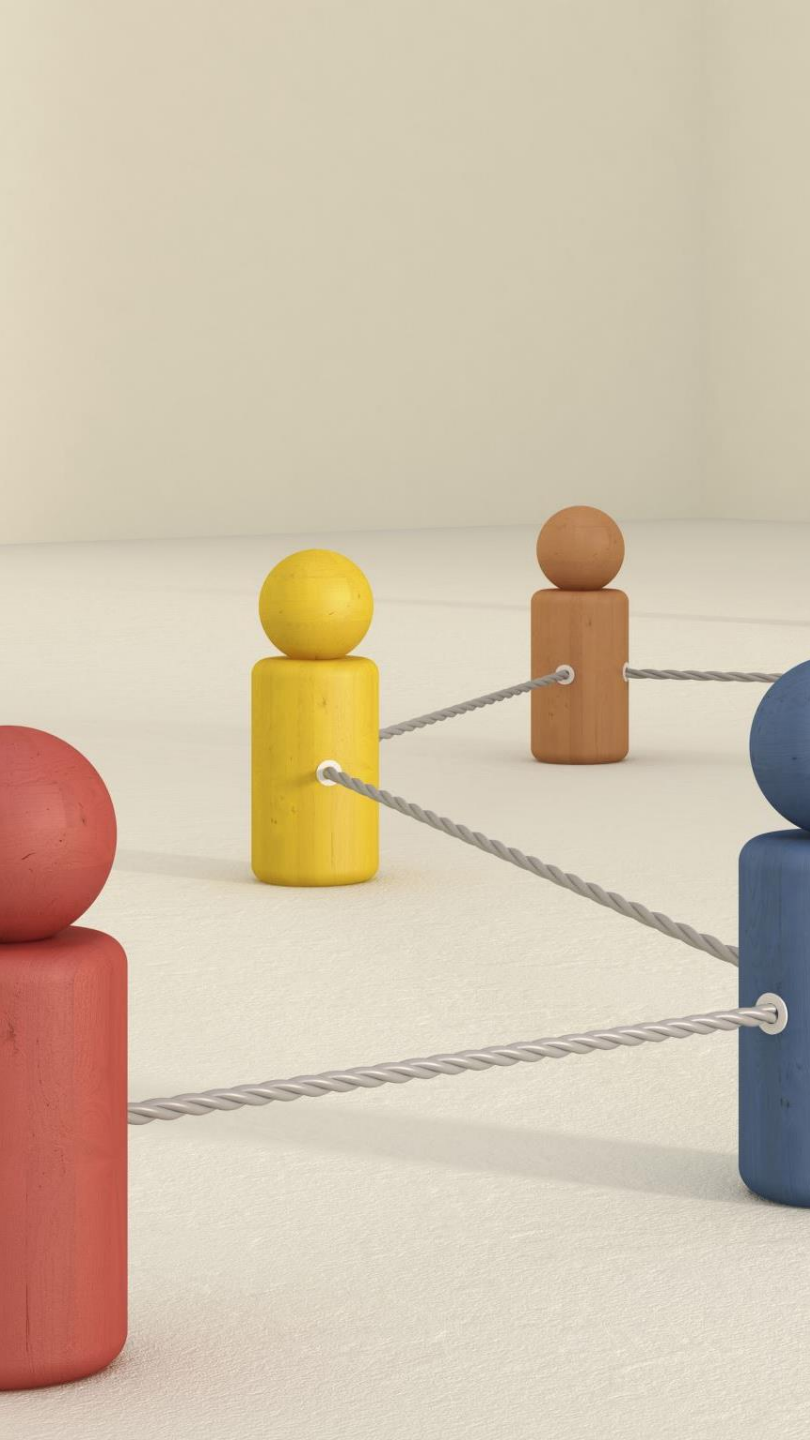


Quick Poll (show of hands)

Which goal is hardest to align post-acquisition?

DO #4: Provide Visible and Practical Support

- Resource the change: training, tools, guidance
- Provide visible leadership and clear escalation paths
- Use role-based enablement for impacted teams



DO #5: Monitor Progress and Adapt

1

Treat plans as
living
frameworks

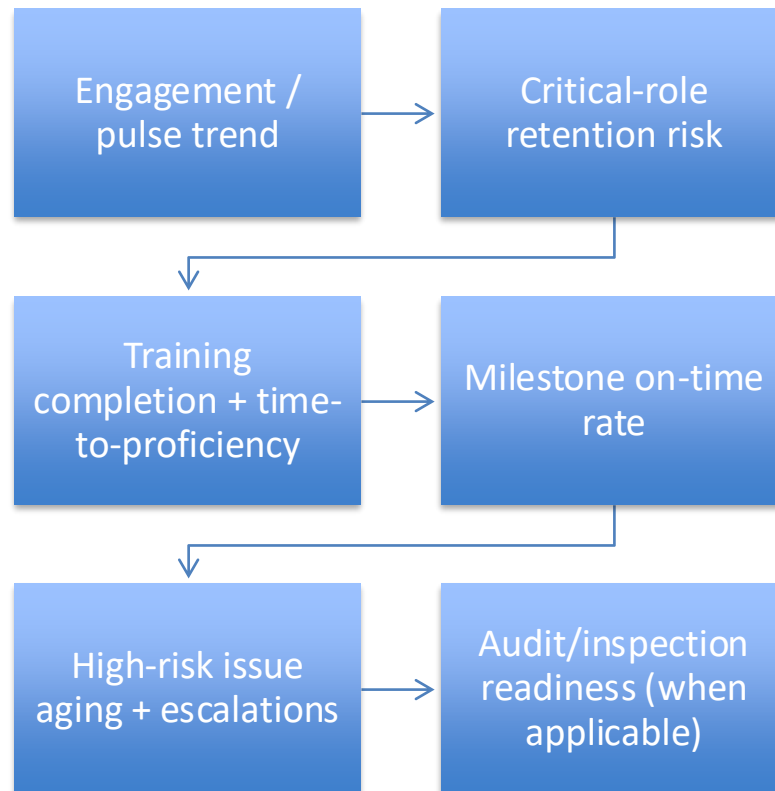
2

Use dashboards,
risk registers,
lessons learned

3

Adjust quickly
based on
feedback and
observation

Integration KPIs (First 90 Days)





DON'Ts (and what to do instead)



Don't assume shared understanding
→ validate and listen



Don't neglect culture → integrate strengths



Don't rush → phase by function; pilot



Don't overpromise → set realistic milestones



Don't isolate teams → break silos

Quick Poll (show of hands)

Which 'DON'T' do you see most often?

Common Failure Patterns (early warning signs)



SILENCE MISTAKEN
FOR STABILITY



OVER-CENTRALIZED
DECISIONS WITHOUT
CONTEXT



CULTURE IGNORED
UNTIL ATTRITION



ANNOUNCEMENTS
REPLACE DIALOGUE



VALIDATION/CHANGE
CONTROL
UNDERESTIMATED

Regulated-Environment Callout



Patient safety and data
integrity first



GxP changes require
change control + risk-
based validation



Balance speed with
inspection readiness and
audit trail continuity

Lightweight Integration Governance Model



Executive sponsor(s)



Steering committee
(decisions/priorities)



IMO
(coordination/reporting)



Workstreams: IT | QA |
Ops | HR | Finance



Local champions

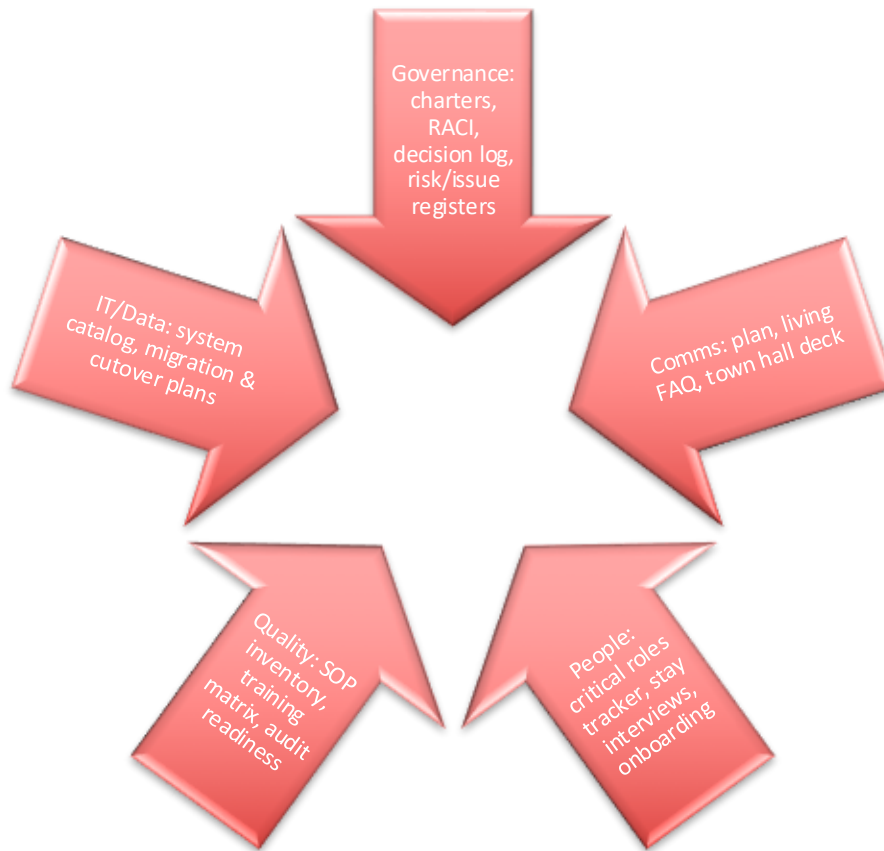


Escalation path +
decision log + risk/issue
registers

90-Day Integration Playbook (High Level)

Phase	Primary Objective	Representative Actions
Days 0–30: Stabilize	Reduce uncertainty; protect delivery	Governance + comms rhythm; rapid inventory; GxP guardrails
Days 31–60: Align	Design future state	Workshops; roadmap; pilots; training plan
Days 61–90: Optimize	Execute and embed	Scale pilots; SOP harmonization; BAU governance; celebrate wins

Resources (What to build)



Closing: Top 5 Takeaways



Cadence beats one-time announcements



Governance and decision rights prevent chaos



Phase integration in regulated environments



Culture integration supports retention



Measure, learn, and adapt





If you are dissatisfied with they way
things are, then you have got to
resolve to change them.

— *Barbara Jordan* —

AZ QUOTES



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Thank You

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