

About EY Lane4

The combination of EY and Lane4 focusses on harnessing the power of people.

Powered by technology, EY puts humans at the centre of business transformation. Lane4 takes people beyond performance, giving them the skills and mindset to achieve things they never thought were possible.

We've come together to deliver on our purpose – to build a better working world.

We believe that organisations need to put people at the heart of their decision-making. Not only will this create long-term value for stakeholders inside and outside the business, but it will help ensure success across large-scale business transformations. At EY Lane4, we bring together some of the biggest and influential leaders around the world, drawing on their insight to shape how we support our clients with their people and transformation challenges.

Understanding the psychology of learning and knowledge retention is at the heart of our approach. Our people also bring a wealth of experience from performing at the highest level such as in Olympic sport, the military, the arts and business. This unique combination allows us to walk alongside leaders, acting as trusted advisors to challenge and support them throughout their transformation journeys.

However, at EY Lane4 it isn't just about senior leaders. We believe that everyone deserves access to world-class learning and development. Our global reach, digital learning solutions and innovative service delivery allows for consistent development across multiple levels of the organisation.

This means people can develop behaviours that will not only help them to perform at work, but in all parts of their life. It gives people the confidence and belief to try new things and truly thrive.

All this combined allows us to build a better working world.

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Introduction

Change takes many different forms and yet, traditionally, academics and leaders alike have adopted a 'one-size-fits-all' mindset. Unfortunately, change is not that simple. All change is not equal and efficient change management requires a more nuanced, context-based approach.

The statistic that '70% of all change initiatives fail'1,2,3 has dominated the literature and directed change research for decades.

For academics, this statistic reads like a call to arms; a call to find out why so many change initiatives fail, a call to solve the problem of change. Over the last 30 years, numerous studies have consequently been carried out to explain why the change failure rate is so high, with explanations including: lack of resources, ineffective reward programmes, insufficient commitment from those managing the change, poor communication, lack of employee engagement, and dysfunctional management practices.

All of these factors are undoubtedly important to successful change. However, there's a fundamental flaw in the logic. The statistic bucketed all change within one big umbrella, which prompted researchers to find the one root cause of the change problem,¹ i.e. one challenge, one cause, one solution.

Change cannot, however, be considered in one big all-inclusive bucket. There are a vast variety of change situations that leaders can face and, to cope with each effectively, a more nuanced approach is called for; an approach that considers the specific change occurring within its specific context. An approach that appreciates that all change is not equal.

To address this need and explore what a more context-based approach to change would look like, Lane4 conducted our own research project. We approached 10 senior leaders from a range of industries who had recently undergone significant change and nine experienced organisational change consultants, using interviews and a focus group to gather the data. This white paper presents our key findings into the various ways changes can differ. Specifically, our research highlighted five contextual factors that business leaders need to consider when implementing change.



Five contextual factors to consider when leading change

Every change sits within its own unique context. Ignore these contextual factors, and your change will seem slippery and erratic. Become aware of them, and your change can be predicted and planned much more effectively. We cover each of these factors on the following pages.



Contextual factor 1:

other changes occurring within the business

Leaders must now consider how to manage multiple simultaneous change initiatives as one. Gone are the days of completing one programme before starting the next.

None of the leaders we spoke to reported having this luxury. One participant even reported a massive 38 changes on the go in their business at the time of the research. In what is now referred to as a VUCA world (Volatile, Uncertain, Complex and Ambiguous), this is both unsurprising and unlikely to change. If anything, the challenge of juggling multiple changes at once is probably only going to increase in the future. Amongst our participants there was widespread agreement that successful change requires the management of multiple changes as one. In other words, leaders need to be sure they are working with the whole system, not just their bit of it. Otherwise, changes would be at risk of contradicting and derailing each other, as the quotation below explains:



We've had new leadership who have been driving a strong inclusive leadership culture and ideals. At the same time, quite a few jobs have been cut and the manner this has happened in hasn't always fit with the inclusive style that is being articulated ... The messages can be contradictory.

In response to this 21st century challenge, many leaders more precisely emphasised how it's useful to have one person or team solely dedicated to managing change throughout the business:



There was a big moment when actually the structure changed. So before, everyone was doing their piece and there was a moment when it clearly really wasn't working, so the company put in place one person to be in charge and that changed things substantially.



There's a group of people, you know, relatively small but which we supplement as and when we need to, who are specifically charged with managing change.

The role of this team or individual in managing change is analogous to that of a musical conductor. In musical terms, this conductor would be managing what's known as a 'polyphonic' composition; one where multiple melodies are being performed at the same time, distinct, but in harmony with each other. Each melody is independent and yet intertwined with the wider performance.

With this analogy in mind, it's vital to remember that in today's VUCA world, change is relational by nature (i.e., different change initiatives will interact and influence each other). Therefore, to manage any change effectively, other changes occurring in the business don't just need to be considered but also need to be cleverly orchestrated as one so that all activity is synchronised.

Change tip

No change is an island; each change will be impacting on and impacted by other changes that are occurring in the business. When planning and implementing change, be sure to map out what else is going on and anticipate potential conflicts or contradictions.

Think system not project. In addition, protect your people from change fatigue by creating a clear narrative around the purpose of the change occurring. Focus on the big picture of what the company is trying to achieve and how the different change initiatives link into that purpose.

Contextual factor 2:

the culture of the organisation you're operating in

All change is, to some degree or other, a culture change. It's impossible to significantly impact any aspect of an organisation and not shift the culture.

Furthermore, as our previous research in this area highlighted,⁸ all cultures have a shadow-side within which unsurfaced forces can be working for, or against, your desired change.

Our research interviews revealed how organisational culture is a factor commonly over-looked by leaders attempting to implement change. This is a finding that resonates strongly with the wider research literature, which frequently cites lack of consideration of cultural factors to be a prevalent cause of change failure.^{5,9}

But, what exactly does 'lack of consideration of cultural factors' mean? Our analysis revealed two specific cultural considerations often overlooked by leaders during change, namely: cultural benchmarking and loss of cultural icons.

Cultural benchmarking

Every organisation has a cultural benchmark of 'how things are done around here' and 'what is expected'. These expectations can range from the authenticity of leadership communication, to the atmosphere of events, to the values implied by certain behaviours, processes or rewards. In various forms, this notion of cultural benchmarking was referenced by many

of the participants in the research. As one leader noted:



In terms of communication in my view, which might be a bit harsh, it's been minimal. Well, moderately poor. And, I don't think that's the chief exec's fault. He did what might be regarded in another business as quite a good job. It wasn't bad ... it just wasn't [organisation name].

To manage a change successfully, it's important therefore to firstly have a good understanding of the culture you're operating in. Equally, it's critical that each aspect of the change is carefully planned so it lives up to, or exceeds, these cultural expectations.

For example, if the organisation has a strong 'family feel' that the leaders want to protect, extra attention should be paid to providing people with support and telling the story of change in a way that recognises the organisation's values of care and loyalty.

Of course, this congruence may be easier to achieve in certain types of changes (e.g. a change of ownership vs. organisational restructure, where departments may be closing and contracts terminating). 10 However, as much as possible, the way the change is implemented should align with the existing culture and values. Any apparent contradictions in how the change process is being handled must be openly acknowledged and actively managed, as the following quotation exemplifies:



We are doing some significant restructuring and are losing senior people. And, the emotional weight of that is quite strong, because it's a relationship-based organisation, so when you hear somebody's leaving, people feel the loss quite strongly. Relationships are important here, so we are consciously working with teams around the change, around the people aspects of change and also very quickly getting down to rebuilding relationships. Helping new teams connect or reconnect.



Loss of cultural icons

Cultures always have icons – people who embody what that group is truly about. Get these icons championing a change and they can unleash a driving force like no other. Lose them and your change could take an unexpected turn for the worse.

It's no secret that increased turnover is often an intended or unintended consequence of change. 11 Common practice is to conduct a thorough talent audit that reveals who you've got and who you need, ultimately pinpointing where there are gaps to fill. However, as the quotation below highlights, rarely do we consider talent in terms of culture: who embodies what we stand for and our identity as a company? Who would we like to keep hold of culturally?

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It's less obvious to see the people that actually shape and influence the culture, who we are, and create a bit of a legacy. We've let go of too many people that are important to our culture and the way we live and breathe as a company. And, actually I'm slightly worried we might lose the essence of who we are a bit.

Of course, some casualties of change are unavoidable, but our research clearly flagged how important it is to not lose your cultural icons through 'neglect or poor management'. Instead, identify who your company's cultural icons are, get them on board and use them to help, formally or informally. They should champion the change needed throughout the business.

Contextual factor 3: change momentum

Not all change happens at the same pace or scale. For example, a company might be preparing for a significant change in industry legislation, responding quickly to a crisis, or implementing small changes to streamline processes. All are types of change, broadly speaking, but are still nonetheless very different in nature.

Collectively, the two variables of pace and scale refer to the level of 'change momentum', 12 and, as Figure 1 depicts, there are four main classifications of change in terms of momentum:

Figure 1
A model of change momentum



Effective change management requires an awareness of which of the four boxes your change project falls within and the specific challenges that may crop up as a result. Furthermore, because changes can shift in their level of momentum, it's not enough to only classify your initiative at the start. Each change should be classified stage by stage, factoring in the challenges likely to arise as the initiative unfolds.

Due to the sampling of participants in our research, only leaders whose organisation had undergone largescale change in the last few years were interviewed. Consequently, our data provides insight into the specific challenges that come with fast and slow, large-scale change. For these two boxes, our leaders' top tips were as follows:

Slow, large-scale change: don't lose momentum and avoid the siloed working trap

Our research highlighted how, when leading slow, large-scale change, the two biggest risks are loss of engagement and excessive siloed working.

In the academic literature, researchers refer to the equation 'pace + scale = change momentum'. ¹² In line with this, losing positive energy and engagement were certainly prevalent issues for participants in our research, as the quotation below illustrates:



The legal and regulatory processes really slowed us down, and it's very, very difficult to explain that to colleagues who are directly impacted. Although they probably rationally understand, they don't care; they saw it as being our problem even though there wasn't anything we could have done differently.

Avoiding loss of engagement during slow, large-scale change ultimately boils down to your communication strategy. Timely communications need to be planned, crafted and sent out so people are kept upto-date with what's happening, what the hold ups are, and the timelines for future actions.

Our data also showed how, in heavily regulated industries where 'planned' change dominates, it's easy for leaders to adopt siloed working practices.

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And we have a regulator that's still exercising a significant amount of scrutiny, so how do you balance those two things? How do we get our leaders out of the weeds and looking up, across, horizontally rather than just looking down in their kind of vertical siloes, their areas of responsibility? We are making progress but it's not an easy thing to do. It's just kind of a habitual way of working and it takes a while to change habits.

To avoid this second potential pitfall of planned change, collaborative upskilling is needed. More precisely, time should be taken to refocus leaders on the bigger picture, connect them with their shared goals, exchange learnings and explore where opportunities to combine efforts and resources are being missed.

Fast large-scale change: 80% is good enough and remember your customers

Many of our participants had just survived the experience of implementing change 'at scale and at speed'. Analysis of the data revealed two clear strategies to manage this type of change. Firstly, change undertaken at rapid pace and significant scale required leaders to implement a shift in decision making. As the quotations below show, there was widespread consensus amongst our

participants that the secret to managing this type of change successfully was an '80% is good enough' mindset:

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We ensured we were reasonably pragmatic about the implementation of change. Being 100% perfect? That doesn't work, it slows us down. A more agile environment, where there's always a lot going on, you need to be thinking about the 80/20 rule.

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If you're trying to deliver it error free, you either will never land it or you'll spend so long planning it and trying to land it that you've kind of missed the moment anyway.

Secondly, our research showed how this 'good enough' decision making and 'fail fast' mindset does come at a price. Above all, many of the leaders we interviewed emphasised how it's the customers that often feel the brunt of a large change that's moving at pace:

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It comes with big risk. When you go at that pace, of course you make mistakes and you have errors and unfortunately customers feel some of those errors.

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The challenge of delivery at pace whilst also minimising customer disruption and impact was a huge one. Once we'd landed the change, we didn't spend enough time getting things right for the customer before we moved on.

Collectively, our findings suggest leaders need to do two things when dealing with fast-paced, large-scale change. Firstly, be comfortable making decisions when it matters, not once you've dotted all the i's and crossed every t.

To be effective you need to be timely, not waiting for every potential extra bit of information that may or may not come in. Secondly, it's important to remain customerfocused. Mistakes will happen so ensure extra support is available and that the customer experience is as it should be before moving on to your next change.

Change tip

Changes vary in both pace and scale, which collectively denote an initiative's 'change momentum'. When managing change, it helps to classify a project in terms of its momentum, stage by stage. Different classifications bring different challenges and change initiatives can shift classifications as they progress.

For slow, large-scale change, key watch outs are loss of engagement and siloed working. For fast, large-scale change, leaders need to adopt an '80% is good enough' approach to decision making and take extra care with their customers.

Contextual factor 4:

your organisation's track record with change

Our research clearly highlighted how all organisations come with a certain amount of 'change baggage'.

Across many of our interviews it was apparent that leaders not only have to manage their current change, but also to some extent or another, the ghosts of past changes. As Pettigrew, Woodman and Cameron (2001) noted: "history matters when studying change, it's not just events and chronology, it is carried forward in the human consciousness. The past is alive in the present and may be shaping the emerging future." Specifically, our analysis revealed the theme of 'change baggage' to have two sub-components: the emotional hangover and people's expectations based on past experiences.

The emotional hangover

Our interview data was littered with warnings from leaders to not underestimate the emotional impact of change. Due to the way that our brains our wired, ¹⁴ implementing any change is like navigating an emotional minefield. Avoid the triggers and you'll escape unscathed, but make a mistake and the consequences will be both disproportionate and lingering, as the following quotations illustrate:

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That was a restructure, pretty much everybody reapplying for their roles. And, I don't think the story was ever communicated very well. I think some people still feel very bruised about the way it was done. 66

Small mistakes or errors, or things previously over-looked, when it's in the context of impacting people, get magnified by a hundred.

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It's surprising how long things hang around; people are like elephants!

There's no doubt that most changes are accompanied by an emotional hangover. As Maya Angelou once wrote "people will forget what you said, people will forget what you did, but people will never forget how you made them feel." 15

But what can leaders do about the mistakes of the past? Well, when planning your current change, take some time to reflect on what's gone before and how people might be feeling. Review what's worked well historically, what's worked less well and where extra emphasis might be needed to counteract past mistakes.



Expectations based on past experiences

Employees' and leaders' previous experiences of change are always carried into the next change initiative. Or as one change consultant put it: "if people don't know what's going on they'll base their expectations on what happened last time". In turn, various leaders flagged how 'managing expectations is really important'.

Our research suggests these expectations come in two forms: practical and psychological. Practically, people will have expectations about how the change will impact them, including how much extra work will be required, what compensation they'll receive and how much support will be provided. As the quotation below illustrates, these expectations need to be considered and addressed upfront:

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The previous owner had invested something crazy, like £12 million of his own money, and he'd sold for something like £750 million. So, he was very generous on sale, he'd paid out everyone an individual bonus. But this sale was much smaller, so we had to kind of send the message: look don't be expecting that this time, there's no individual here but a series of investors so it's not the same dynamic.

In terms of psychological expectations, the combination of emotion and previous experience can result in what the research literature defines as 'change cynicism'. Specifically, academics suggest cynicism towards change in an organisation arises from having a history of unsuccessful change attempts, loss of faith in leadership's ability to manage change, and a lack of participation in previous change decisions. ^{16,17}

Left unchecked and unattended this lack of belief can fester, becoming something of a self-fulfilling prophecy, where high levels of cynicism result in people being less committed to make new changes happen.¹⁸

None of the leaders and change practitioners we interviewed referred to organisational cynicism explicitly, which suggests there is a gap between academic knowledge and current practice. Change cynicism is a well-documented, well researched phenomenon. It can and should be measured, and needs to be managed to prevent unsuccessful change breeding further unsuccessful change.

Change tip

Past changes impact on current changes. This is a part and parcel of managing the people side of change. Emotions, expectations, and beliefs all build up over time and this 'stuff' can't be swept under the rug. Acknowledge emotions, learn from the past, answer the unanswered questions, and measure and manage cynicism. One effective tactic for engaging people is to identify and the different persona's going through change, mapping out the varying experiences people may have had or be facing currently. Then, with this insight, you can offer targeted communications and engagement to specific audiences.



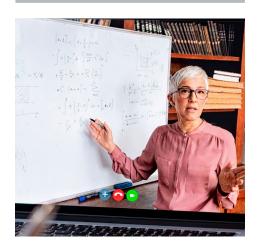
Contextual factor 5: the type of change occurring

Change can take many forms and different types of change bring different considerations. Leaders might be faced with the challenge of a restructure, mergers and acquisitions (M&A), culture change, process change, new CEO, product innovation, redefined strategy, growth to serve emerging markets, relocation, and the list could go on.

While there are certainly some commonalities between all types of change, the factors that need to be prioritised people-wise in a restructure, for example, are not the same as those when introducing new technology.

The solution needs to match the type of change occurring and this requires subtler insight.

Based on our research we have pulled out the key considerations for leaders experiencing four prevalent types of change: IT system changes, M&As, restructures and changes in ownership.



IT systems change

Our findings suggest it's easy to underestimate how much behaviour change is required during this type of change. To be effective, leaders need to make sure they:

- Upskill people on the basics.
- Develop people's collaborative capability and systemic awareness.
- Check that there's a common language.
- Have a system in place that provides support and processes feedback or issues.

Research has also highlighted various key derailers of IT systems change:19

- Lack of urgency or loss of momentum.
- CEOs not sharing their vision for digital transformation.
- Leader paralysis when faced with the prospect of investing a lot of money in a system that will likely soon become outdated.
- Adoption hampered by people's fears of losing power through knowledge dissemination.

Change of ownership

Our research revealed three priorities for leaders managing a change of ownership:

- Build trust through honesty. People will be wary of the new owners having a 'hidden agenda' so it's important to be honest. Let people know how it's going to be and what the new agenda is, if there is one.
- As much as possible, avoid sending people mixed messages. When communicating, be clear on what is known and what isn't. Don't attempt to fill the gaps. As one participant put it 'don't paint the picture you don't know'.
- Take a long-term view. Our data suggests that, during a change of ownership, it's easy for leaders to get caught up in the sale. However, it's important to also do some futurethinking and scenario planning, such as by considering what the new roles will be like and how to build the new teams.

Restructure

Our findings showed that, during a restructure, what matters most to people is fairness. Neuroscience research shows how the perception that something is unjust generates a strong emotional response and can create feelings of hostility, which ultimately derail the change.14 During a restructure, people are acutely aware that jobs will likely be cut or, at the least, reviewed. This needs to be done fairly, with leaders ensuring that talent is assessed and selected in a systematic, rigorous and transparent way.

Furthermore, our participants highlighted how a restructure can be a particularly emotional journey, with people often transitioning from excitement to apprehension to lack of trust to disillusionment. In view of this, leaders should:

- Design a communications strategy which actively keeps people engaged with each stage of the restructure, addressing people's needs and questions in a timely manner.
- Brief managers well so they can confidently have open conversations with their team about the restructure.
- Upskill managers in how to support people as they transition through the change, helping them reach a level of acceptance rather than lack of trust and disillusionment.

Mergers and acquisitions

In terms of contextual factors, the influence of culture is a priority when managing M&As. Specifically, leaders should:

- Enhance their understanding of each organisation's articulated, lived and deep culture.
- Identify key cultural icons in each organisation and use them to champion the change and desired future changes.

Our research also showed how emotions are particularly heightened during mergers. There's a lot of uncertainty and a lot of 'worst case thinking' from people. To reduce what's known in the literature as 'merger syndrome', it's recommended that companies should:20

Run realistic merger previews that give people a detailed insight into what the new organisation will be like for them.

Analysis of our data on this type of change further revealed two key enablers:

- Visible symbols of unity.
- Negotiating skills for leaders.

Change tip

Different types of change have defining characteristics which need to be considered for the initiative to run smoothly and successfully. Be aware of the specific enablers and pitfalls that different types of change bring and prioritise 'must do', 'should do' and 'could do' actions accordingly.



Conclusion

The goal of making change success inevitable starts with considering the context. Managing the people side of change is, was and always will be tough.

There will always be an element of the unexpected and a need to cope with a level of ambiguity. However, with insight into the contextual factors of change, leaders can anticipate what others won't consider until it's too late.

In terms of the contextual factors that should be considered, the key 'take-homes' are these:

Manage multiple simultaneous changes as one

It's highly unlikely that your organisation will be implementing one change at any given time. To avoid changes contradicting or derailing each other, leaders need to work with the whole system, not just their siloed initiatives.

Consider the culture of the organisation you're operating in

Every organisation will have a cultural benchmark of 'how things are done around here'; change initiatives need to meet or exceed these expectations. On top of that, to help propel the change forward, get those who embody the company's spirit on board and championing the change.

Factor in change momentum

Changes vary in their level of momentum, characterised by their pace and scale. For slow, largescale change, watch out for loss of engagement and overly siloed working. For fast, large-scale change, shift to an '80% is good enough' mindset but be mindful that customers may feel the brunt of this approach, so also stay mindful of the customer support.

Review your organisation's track record with change

When it comes to managing the people side of change, the past will very much influence the present and determine initiative success. It's no good managing a change as if it's on a blank slate. Review what's gone before, assess where people are at, measure levels of cynicism, and tackle emotions and expectations head on.

Prioritise depending on the type of change you're dealing with

Different types of change bring different considerations. In this paper, we outlined the defining characteristics and common pitfalls of four prevalent types of change: IT system changes, M&As, restructures, and changes in ownership. Whilst this is very much just the tip of the iceberg in relation to the number of types of changes a leader might face, the key message is this: flex your priorities depending on the specific change occurring. One size certainly doesn't fit all.

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