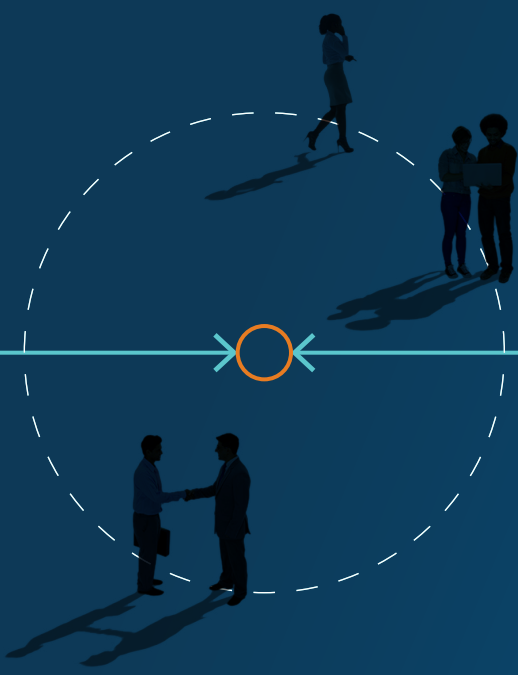


10 Ways To Maintain And Amplify The Value Of Your Merger Or Acquisition



Mergers and acquisitions require a lot of complex decisions, but none are more critical than those that impact your customers or members. These ten best practices will help you retain customers for a successful M&A.



01 Communicate the News (ASAP!)

It's amazing what letting your constituents in on the news can do! Let everyone know what to expect as soon as you can.

02 Anticipate Questions

Mergers and acquisitions naturally prompt questions. Be prepared for sudden spikes in contact center inquiry volume by ramping up capacity and equipping staff with the information they need to support people.



03 Benchmark the Experience

The best way to know how you're doing (and how to improve) is to evaluate the current user and employee brand experience. You'll be glad for this information later!

43%

of bank leaders say they are likely to buy another bank by the end of 2025, up from 35% only a year before.¹

¹ Bank Director, "2025 Bank M&A Survey," November 2024.

04 Give VIP Treatment

You know who your high-value customers are. Make sure they know you value them. M&A events are the perfect time to let your best customers know you appreciate their business.



05 Welcome the New Customers

Treat the customers and employees of the acquired institution as an integral part of the merger or acquisition.

31%

of bank leaders say they want to be active acquirers over the next five years.²

² Ibid.

06 Notify Everyone of Changes

An acquisition necessarily means changes — to the branches, products, pricing and more. The best way to keep people on board is to be upfront and transparent about those changes.



Be upfront and transparent about changes.

07 Amp Up the Outreach

You should anticipate an ongoing and sustained surge as people reach out to you but stay proactive in your communication.

08 Optimize Check and Card Re-Issuance

M&As mean checks and cards will need to be re-issued. The process should be smooth and immediate for an optimal experience.



45%

of people worry about potential changes to their accounts, fees, and the overall quality of service.³

³ Visbanking, Bank Merger Mania: Winners, Losers, and Market Impact, 2023.

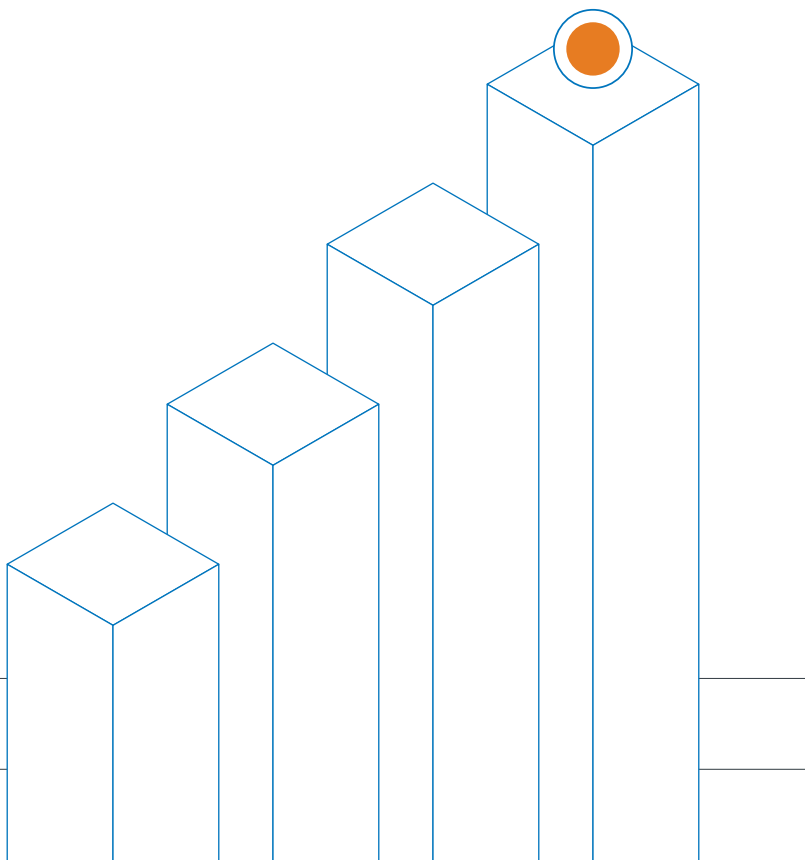
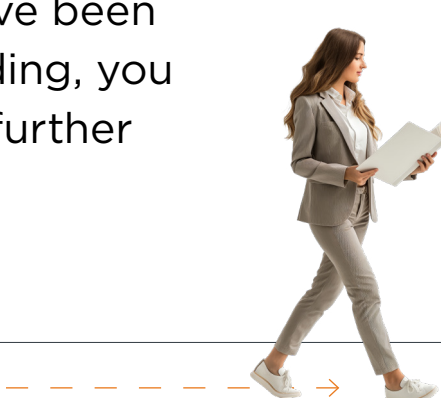


09 Provide Guidance for Platform Changes

Mergers almost always mean converting digital banking platforms. Your operations team is ready to make it happen. Are your users ready?

10 Check Your Progress

Remember those benchmarks mentioned above? How are you performing relative to them? If you've been communicating, optimizing, anticipating and guiding, you should experience growth and progress, adding further value to the M&A event.



Turn high-impact mergers and acquisitions into high-value experiences with Vericast as your partner.