

# Sealing The M&A Deal



## M&A Opportunities and Interest Are on the Rise

43%

of bank leaders say they are likely to buy another bank in the next year.<sup>1</sup>

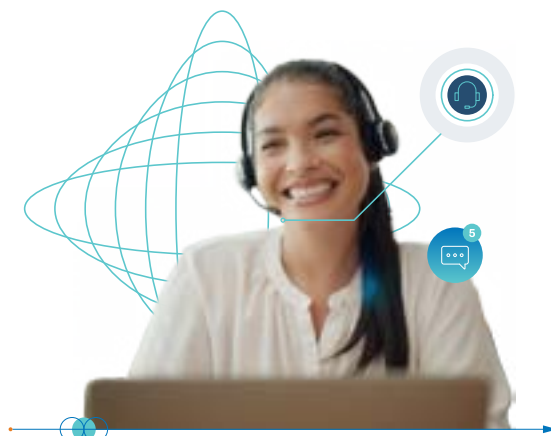


## Managing Consumer Uncertainty Is Key to an Effective M&A

Set a clear timeline and manage expectations to reduce stress and disruption.

64%

of people surveyed say they are most likely to leave within one month after an acquisition is announced.<sup>2</sup>



## 4 Ways To

GROW REVENUE

REDUCE ATTRITION

BUILD BRAND EQUITY

IMPROVE SATISFACTION

## Personalize your communications

Go all-in on personalization. A big pitfall for M&As is putting too much focus on the mechanics, and not enough on the customer experience.



54%

of consumers want financial providers to leverage their financial data to personalize their experience.<sup>3</sup>

## Provide white-glove service to business-critical customers

Assign dedicated representatives to reach out to your best customers with white-glove support to ensure they are ready for the transition and understand the benefits.



Proactive communications delivered at the right time, with the right offer can increase revenue.

85%

of financial services customers say communication is “very important” or “somewhat important” to their overall customer experience.<sup>4</sup>

## Deliver the consistent brand experience customers expect

Coordinated, consistent communications inspire confidence and make customers more likely to stay.



72%

of banking customers report higher satisfaction when financial institutions proactively engage with them.<sup>5</sup>

## Deliver excellent and accessible customer service

Accurate forecasting and proper staffing are key to avoiding long wait times and frustrated customers. Call center activities are especially important, as this may be the first interaction customers have with the acquiring financial institution.

### Humans Want To Talk To Humans

A high performance contact center provides the human touchpoint that is crucial to any successful M&A.



53%

of consumers prefer to interact with a live agent via the telephone when it comes to complex customer service questions or issues.<sup>6</sup>

Find out why an integrated, unified and proactive communications strategy— that puts the customer first — is the blueprint for a successful M&A.

**Get our M&A Success Playbook**

1. Bank Director, 2025 Bank M&A Survey, November 2024.  
2. Ibid  
3. Forrester Research, Unlocking Actionable Intelligence: Key Takeaways from Forrester Opportunity Snapshot, 2023.  
4. Smart Communications, 2024 Global Benchmark Report: Customer Communications in Financial Services, 2024.

5 Zipdo, Customer Experience In The Financial Industry Statistics, 2025.  
6 Cogito/Dynata Study, December 2023, n=1,000.