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----- WHAT'S UP, DOC? -----

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"Creating Leadership Solutions for Profit and Growth"

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THIS MONTH'S THEMES: (1) POST-MERGER INTEGRATION  
PART II; (2) HOW TO FIND A MENTOR PART II

It's a new year, and it's back to business after the holiday season. It's been a very cold couple of weeks around here in the Washington DC area – at least for this part of the world. Lots of ice, and people who don't know how to drive in it, or around it, or through it. Icy roads, like tricky business and career situations, require a new approach. Last November, I began to give some pointers about how to approach post-merger integration management processes, and also some tips on how to find a mentor in order to forward a career. Now, it's time to complete those tips in Part II of the issue I began for you last Fall. I don't want to see any "accidents:" either for your business or for your career. Drive both carefully!

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THIS MONTH'S QUOTES:

"A man who has committed a mistake and doesn't correct it, is committing another mistake." -- Confucius

"A good listener is not only popular everywhere, but after a while he gets to know something." -- Wilson Mizner

"A good idea will keep you awake during the morning, but a great idea will keep you awake during the night." -- Marilyn Vos Savant

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## 1. POSTMERGER INTEGRATION CHECKLIST – PART TWO

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### INTEGRATING MANAGEMENT SYSTEMS

\_\_\_ Have you taken a “big picture” view of the new company’s combined resources and structure?

\_\_\_ Have you considered the degree to which the new company will have a mission different from the individual missions of its constituent parts, and planned accordingly?

\_\_\_ Have you designated work teams to integrate key strategic processes, such as design, production, service and quality standards, internal financial controls and ethics, compensation and selection, marketing, and sales?

\_\_\_ Have you created an integration leadership team to monitor the efforts of your operational integration work groups, and to give them strategic guidance relevant to corporate values, goals and objectives?

\_\_\_ Have you recognized that you cannot foster operational efficiencies and “buy in” through fiat, and created a strategy to “sell” the benefits of the integration process, with its disruptions and changes, to those responsible for making it successful?

\_\_\_ Have you identified your innovators and early adopters responsible for driving the change effort, and avoided the mistake of placing powerful traditionalists or “laggards” in positions or responsibility to implement successful integration?

\_\_\_ Have you taken adequate steps to replace leaders who will fail to forward the integration process, either by holding on to territorial power, maintaining dysfunctional corporate “silos” or by withholding necessary information from others?

\_\_\_ Have you engaged outside support and expertise to support the integration process as needed, or failing that, done sufficient benchmarking of successful integration projects? Have you made an inventory of the post-merger integration expertise of your management team, given the complexities and scale of the new project?

\_\_\_ Have you budgeted and allocated sufficient resources to the integration management group, including full time staff and support, and resources to create or engage training programs as needed to roll out throughout the company?

## INTEGRATING TECHNOLOGY AND INNOVATION

\_\_\_ Have you planned for the integration of your technological systems?

\_\_\_ Have you done sufficient study to determine which technological systems are most efficient and which parts of the organization will most benefit from a conversion to a new system?

\_\_\_ Have you budgeted for the conversion to new technological systems, including training and retraining?

\_\_\_ Have you planned for the integration of your systems of innovation (research and development, etc.)?

## INTEGRATION OF CORPORATE RESPONSIBILITIES

\_\_\_ Have you taken a broad look at who your stakeholders are?

\_\_\_ Have you considered in detail how to meet your responsibilities to customers, including their needs for information about new processes and the new corporate entity (legal and regulatory issues, pricing and quality, technological issues, continuity of services)?

\_\_\_ Have you considered in detail how to meet your responsibilities to suppliers, including their needs for information about new processes and the new corporate entity (legal and regulatory issues, outsourcing issues, technological issues, continuity of account management)?

\_\_\_ Have you considered in detail how to meet your responsibilities to shareholders, including their needs for information about new processes and the new corporate entity (legal and regulatory issues, building shareholder value)?

\_\_\_ Have you considered in detail how to meet your responsibilities to bondholders, including their needs for information about new processes and the new corporate entity (legal and regulatory issues, building bondholder value)?

\_\_\_ Have you considered in detail how to meet your responsibilities to lenders, including their needs for information about new processes and the new corporate entity (legal and regulatory issues, repayment issues)?

\_\_\_ Have you considered in detail how to meet your responsibilities to employees and communities, including their needs for information about new processes, retention and outplacement services, benefits and the new corporate entity (legal and regulatory issues, job retention and relocation)?

The content in this section has been adapted and amended, based on source material found in “The Art of M&A: A Merger Acquisition Buyout Guide,” by Stanley Foster Reed and Alexandra Reed Lajoix, 3<sup>rd</sup> Edition, McGraw-Hill, New York, 1999.

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## 2. HOW TO FIND THE RIGHT MENTOR FOR YOU – PART TWO

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As a psychologist, I know that people grow most through positive relationships. More than from reading books or acquiring information, people – be they adults or children – grow most from sustained relationships with trusted, highly able mentors, such as parents, friends or other professionals. That’s a basic law of human growth. With that in mind, here are some MORE things to consider as you imagine which mentors might be best to help you grow and achieve your own life goals.

### ASK TO HEAR THEIR “LIFE STORY”

Okay, you’re going to respect time limitations. But ask your potential mentor how she came to be at this current place in her career. Express some respect and admiration for her accomplishments, and ask how she got started and what choices she found the need to make along the way. Get the overview. People like to talk about themselves, in general, to a willing listener, and you’ll both begin to create an alliance and learn a lot from asking for the full tale.

### STATE GOALS AND ASK QUESTIONS

During the opening conversation, when you are getting more of your potential mentor’s success story, make your own career and growth goals more clear. Convey that you are not just taking a survey, but that you have a purpose and a sense of direction, so you can implicitly continue to assure your interviewee that you will not waste her time. Share some of your own background and accomplishments, and ask the questions you’ve already prepared.

### ASK FOR SUGGESTIONS

Be sure to take notes of what your potential mentor says. Don’t lose a thing – you have no idea how valuable it may prove later, even if some nugget does not strike you as important the first time around. As you bring the conversation toward its end, ask for suggestions, and once again,

take copious notes. If you get concrete advice, consider yourself quite fortunate – it may be very good advice, and your interviewee has just invested herself, in some small fashion, in your success.

#### “TRIAL CLOSE” – TESTING YOUR POTENTIAL MENTOR’S WILLINGNESS TO BE A MENTOR

Okay, you’re not going to ask this person to be your mentor outright – that’s too much of a commitment to ask after the first interaction. But if you feel good about the conversation, and would like this person to be your mentor, then you should ask for some small commitment – a “trial close” as you sell yourself. Ask who your interviewee’s mentors were, or who had a strong effect on her. Ask if she is mentoring anyone now. If the answer is yes, then ask her how she chose her protégés. If the conversation goes well up to this point, then say, “The reason I ask is that I feel great about this conversation, and would hope one day to be considered as a potential protégé for you. I’m curious what it would take for me to earn such an opportunity?” By using this kind of wording, you presume nothing, but raise your potential mentor’s status and approach this most crucial part of the conversation in the right way. Your wording here matters – a lot – so you may want to practice it with a friend and role play a little bit in advance.

#### SEND A THANK YOU NOTE OR APPROPRIATE GIFT

Manners count! Don’t omit this step. A “thank you” note is a must, and if you’re good at it, send a thoughtful token gift. If, in the course of your conversation, you learn your potential mentor likes golf, and also likes a particular sports team, then golf balls with that team’s insignia on them might be a nice, thoughtful thing to send. Don’t go overboard with money – you don’t want to look like you’re trying to buy their favor – but find something thoughtful and unusual that shows you were listening, and that you really were creative in anticipating her interests.

#### EVALUATE INFORMATION AND TAKE ACTION

Take a look at your notes and see what you can put into action. You may not find everything to be to your taste, and you may feel afraid to take some of the suggested steps. But do what you can, and move quickly. Don’t be afraid to be a little bold – hey, you’ve already come this far, right? You may find some suggested steps don’t work for you, but the important thing is to try new ideas, see what yields fruit and see what path may not be of as much value – at least in the immediate term.

#### CALL YOUR POTENTIAL MENTOR WITH YOUR RESULTS

Once you’ve begun to have a little success with some of the suggestions and ideas you’ve gathered, then it’s time to call your potential mentor back to tell her what you’ve accomplished, and what you’re learning along the way. Thank her for her suggestions, and be honest about what things

you began to try but struggled with. The overall tone should be one of gratitude and acknowledgement of her assistance. Then, as the conversation concludes, ask if you may call back again in a few weeks to report your continuing results. You may also get a few suggestions during this conversation. More than likely, your potential mentor will be glad to accept a call later to learn how you are faring with their continuing suggestions – as long as you can show that you are valuing what they have to say and are taking action.

#### SET A SECOND APPOINTMENT

When you make your second follow-up call, once again, you must express thanks and give an update. You will also do well to offer to take her to lunch or otherwise express your gratitude. Tell her you'd like to have the chance to chat some more, and state that her ideas have been invaluable. By getting together, and buying her lunch (or breakfast, or whatever), you can both take some small token of action that expresses your gratitude and share the fun and learning that you are gaining along the way. You will not be able to repay your mentor the monetary value of the advice that she has given and you should say so. But lunch, after all, is just a small thing, and you'd be honored if she would accept your invitation.

#### PROPOSE THE MENTORING RELATIONSHIP

If things are still clicking in the relationship when you get to the lunch or second meeting, then as you go through another round of sharing stories, taking notes and accepting suggestions, then you should take steps to “close the deal” on the mentoring relationship. Set out some ideas about how you think the relationship might work – how often you might meet or talk, for how long, etc. Check again to learn what concerns your potential mentor might have – about her time, or related to past problems with other protégés, etc – and sort through the expectations both of you might have to be able to reach a clear understanding of the potential mentoring relationship. If your new advisor agrees to take you on, then you've succeeded! If not, then ask for suggestions of others from whom you might be able to learn, all the while thanking your mentor candidate for all her ideas, suggestions and support. But chances are, if you've come this far, your odds of getting a “yes” to some type of mentoring relationship are quite high. And you'll be on your way to getting the kind of real world education that only experience (not money) can buy.

This process outline for finding and selecting a mentor has been adapted from “Mentoring: A Success Guide for Mentors and Protégés,” by Floyd Wickman and Terri Sjodin, Irwin Professional Publishing, Chicago, 1997.

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### 3. UPCOMING EVENTS

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Please note: There's been a change of date for the following seminar. Last month, I mentioned it would occur in February, but schedule conflicts have forced a change to March 24<sup>th</sup>. However, the Wharton Club of DC and Microsoft are still cosponsors.

“What’s Next for Your Business? How to Grow Smart, Stay Lean and Beat the Competition”

It's been a tough few years, but experts say the market is gearing up for a rebound. As business begins to recover and grow, business owners and executives face complicated decisions in an uncertain environment. Join us November 19<sup>th</sup> for a half day seminar that will help you grow your business, take advantage of an improving market, run your company lean and profitably, and outthink the competition. Four seasoned experts will address critical areas of concern: staffing and retention, information technology, marketing and growth strategy.

Date: Wednesday, March 24, 8:30 AM to 12:30 PM  
Location: Microsoft Corporate Offices, Chesapeake Conference Center, 5335 Wisconsin Avenue, Washington, DC  
Cost: To Be Announced; see [www.optimalbusinessgroup.com](http://www.optimalbusinessgroup.com) for details as they emerge  
Audience: Business owners and senior executives

For more information visit [www.optimalbusinessgroup.com](http://www.optimalbusinessgroup.com) or call (in the United States) 240-499-7920.

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### 4. RECOMMENDED BOOKS AND FILMS

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BOOK: “Benjamin Franklin: An American Life,” by Walter Isaacson, Simon & Schuster, New York, 2003.

Okay, I'll grant you: it's long. But hey, the man lived a long time. Inventor, statesman, midwife to a revolution, champion of human liberty and industry, Franklin was at once a renaissance man and the archetype of what has emerged as a particularly American character: the perpetual innovator and self-inventor. As a bonus, he founded what was to become

my alma mater, the University of Pennsylvania. But my recommendation is more than parochial: this is a really good book, if you have the time and inclination to dive in. It's aimed at the general reader and is written rather smoothly – very nicely done. I highly recommend it.

FILM: Take your pick . . .

I've only seen one movie since my last newsletter: Cold Mountain. And truth be told, I didn't like it. Now, I know most reviewers disagree with me here. Below, I'll give you a link to a bunch of reviews for it. But I found the dialogue self-important, the leads too fastidiously unsullied and improbably beautiful, and the lead characters too one-dimensional and shallow. It's not that I lack any romantic spirit. . . but these characters never once felt like people I could relate to. I spent the evening looking at my watch. Aren't lead characters supposed to have some flaws somewhere, some inkling of humanity, that help us connect with them? But hey, that's just me; I just could not buy a civil war era, destitute Southern belle in Gucci boots. And there's something a bit odd – and a bit disturbing, to me at least – about an American civil war “epic” with nary a mention or reference to slavery. Politics aside, the film did not work for me even as drama. So, I have no recommendations for you this month. To read what the more professional reviewers had to say about Cold Mountain – and they almost all disagree with me – just click [here](#). Here's something I would wholeheartedly recommend: go rent “Rabbit Proof Fence” if you have not seen it yet. You can find out more about that one [here](#).

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## 5. CHUCKLES

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### FROM THE MOUTHS OF CHILDREN...

A three-year old put his shoes on by himself. His mother noticed the left was on the right foot.

"Son, your shoes are on the wrong feet."

He looked up at her with a raised brow and said, "Don't kid me, Mom. I KNOW they're my feet."

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On the first day of school, the Kindergarten teacher said, "If anyone has to go to the bathroom, hold up two fingers."

A little voice from the back of the room asked, "How will that help?"

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## 6. PROMOTE YOUR OWN GROWTH

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You don't have to live near the Schuler Solutions main office in Alexandria, Virginia to benefit from my coaching services. Great work can be done for your own growth and development over the phone and through document review via email. To find out more about your coaching options and available coaching plans, just click [here](#) now.

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## 7. ABOUT DR. SCHULER

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A. J. Schuler, Psy. D., an expert on leadership and organizational change, provides consulting services, keynote presentations and seminars for client companies. His trademark is highly personalized service that leads to measurable increases in productivity, profit and growth. He also provides personalized leadership education and coaching for highly motivated clients.

Dr. Schuler, President of Schuler Solutions, Inc., has served diverse organizations in the private and public sectors, including The Ritz-Carlton Hotel Company, Sony Development, Nomura Securities and the Executive Office for Immigration Review.

A graduate of the Wharton School of Business, Dr. Schuler has successfully led the profitable growth of a dynamic, international consulting firm while serving as Operations Director, and has successfully coached over five hundred CEO's and corporate executives.

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## 8. HOW TO SUBSCRIBE OR UNSUBSCRIBE

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## 9. NEWSLETTER STATEMENT OF ETHICS

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NEWSLETTER ETHICS: This e-Newsletter will be sent to subscribers only upon REQUEST, though subscribers may forward this letter to anyone they wish. Subscriber identities or contact information will NOT BE DISCLOSED to any other persons or entities under any circumstances.

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“Make each day your masterpiece.” -- John Wooden

P.S. - Remember to send in your comments and successes, and to forward this newsletter to at least one friend! Thanks . . . AJS