

The M&A Alignment Canvas

A conversation framework for aligning deals, complexity, and execution across the organization.



Adaptive · Predictive · Delivered

How to Use the M&A Alignment Canvas

Canvas Overview

The M&A Alignment Canvas helps leadership tell a clear, concise story about the deal—placing the entire organization firmly on the path to execution.

The Canvas brings everything into one view: why the deal matters, where people fit, and what needs to happen next. Use it to guide conversations that connect strategy to execution, complexity to clarity, and people to purpose.

Getting Started

1. Start with the Basics

Complete the identifying details at the top:

- **Company Name:** Acquired or merged company.
- **Day 0 Date:** Date the transaction becomes official and planning begins.
- **Day 1 Date:** Operational handover occurs and integration activities begin.
- **Transition Services Agreement (TSA) Exit Date:** Target date for concluding integration activities.

2. Anchor the Strategic Intent

Begin on the left. Circle the **primary Business Driver** that justifies the deal. This highlights the core strategic rationale for the entire organization.

3. Define the Current Situation

In this section, circle whether the acquired entity is **standalone or embedded**. Select the option that best reflects the source of complexity and operational context.

4. Scope the Transformation

In the **Integration Transformation** section, circle the functions that will be impacted. This creates shared visibility for where change is needed.

5. Clarify What Success Looks Like

In the **Value Realization** section, circle the target operating model: independent, partially integrated, or fully absorbed. This defines the intended complexity of the transformation and signals completion criteria.

6. Draw the Journey Path

Connect the dots—from Business Drivers to Current Situation, Integration Transformation, and Value Realization. This creates the storyline of your M&A journey, making complexity visible and defining success.

7. Tell the Story in Words

In the Journey field, write a brief narrative summarizing the path. Cover why the deal matters, what makes the situation unique, required changes, and how success is measured. Keep it clear and high-level—this guides communication and alignment.



Company Name: NewCo International

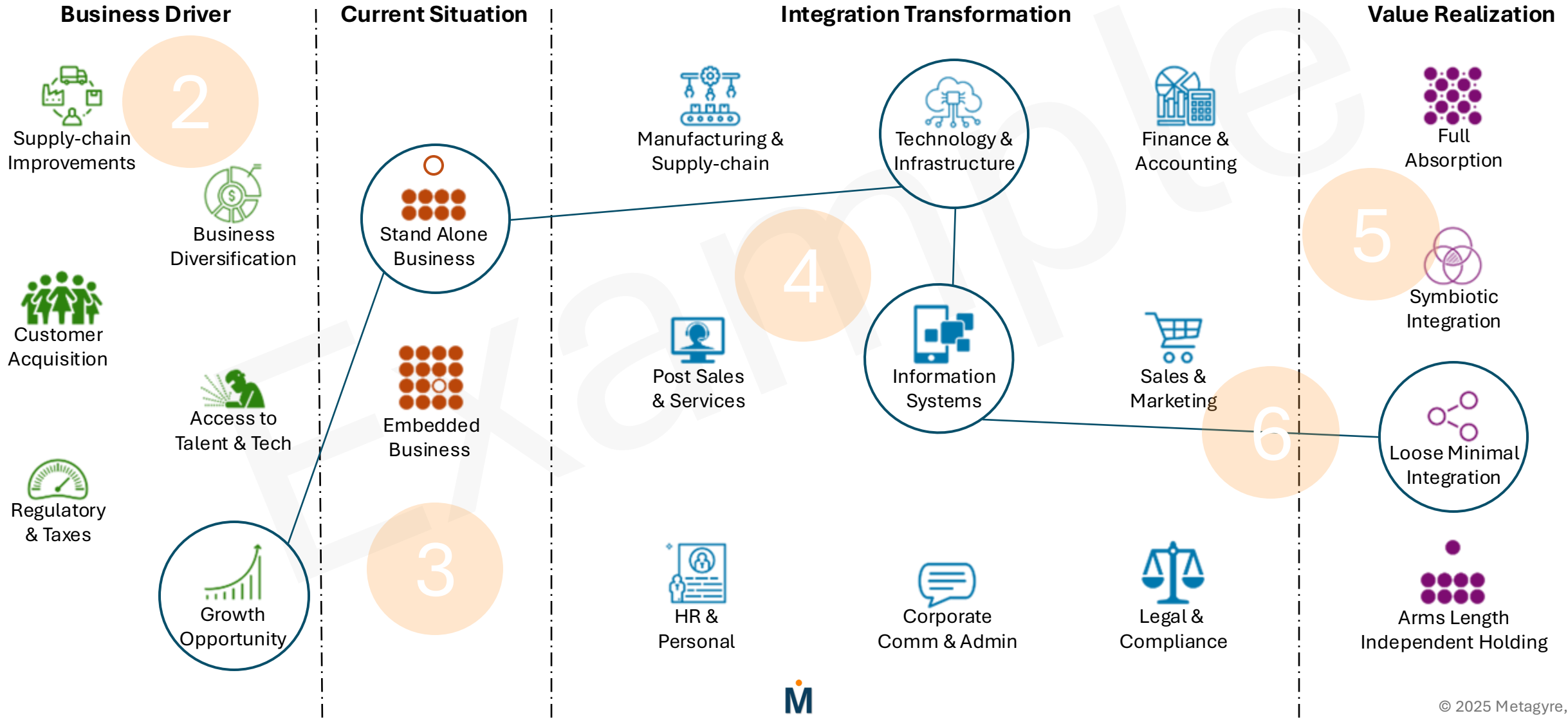
1

Day 0 Date: 6/30/2027

Day 1 Date: 8/31/2027

TSA Exit Date: 5/31/2028

Journey: We acquired NewCo to drive growth. As a standalone business, integration will be straightforward. IT will lead by migrating systems to our cloud, modernizing endpoint security, and taking over support. Other functions will remain unchanged. This focused integration aligns with our strategy and delivers value through a unified tech and IT service experience.



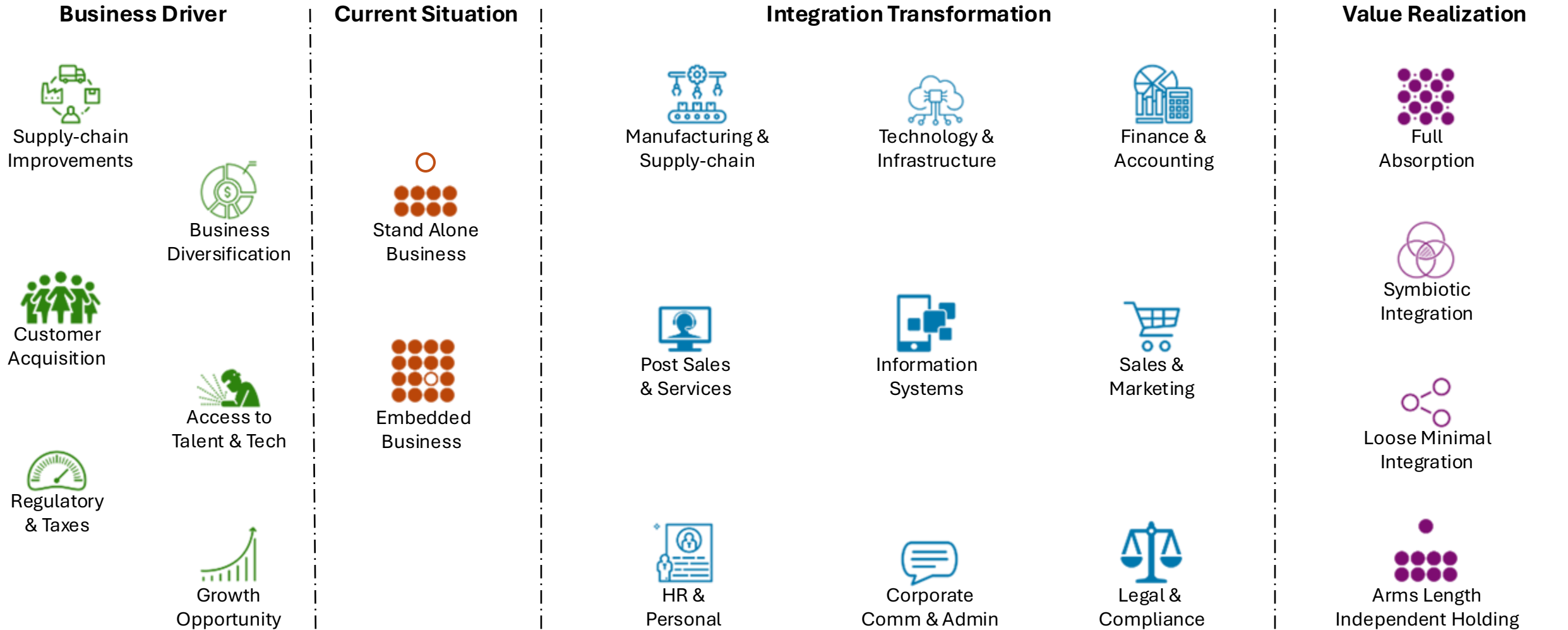
Company Name:

Day 0 Date:

Day 1 Date:

TSA Exit Date:

Journey:



M&A Alignment Canvas

Bringing It All Together

The **M&A Alignment Canvas** is designed to enable conversations that bring clarity, structure, and shared understanding to complex integrations.

Use the Canvas to:

- Align leadership conversations.
- Guide functional planning.
- Communicate across levels.
- Establish guiding principles.
- Refocus when complexity increases or priorities shift.

When used consistently, the Canvas becomes the single slide that connects deal strategy to execution reality.

Planning an Alignment Canvas Session?

[Contact Metagyre](#) to learn how we support leadership teams through M&A complexity to lead integration with clarity.

