**Sample Client Communication Plan**

**Merger of ABC Company (successor) and XYZ Company**

The objectives of the communication plan for the clients of XYZ Company are:

* All partners and staff of both ABC and XYZ will be provided a talking-points script of how to announce and discuss the merger with the clients of both firms in addition to the formal letter clients will be sent. Consistency in our communication is critical.
* The emphasis, especially with respect to XYZ clients, should be on what they will gain from the merger, not the loss of anything they had with XYZ.
* Clients fear change. It is important to discuss what is not changing when talking to clients of both firms. Whenever appropriate, emphasize that the services, client service staff/partners, fee structure, and service methodologies the clients rely on will not change.
* All XYZ clients will be segmented into three categories: A Clients (generally the largest and most important clients), B Clients (generally smaller business clients and large individual clients), and C Clients (made up of mostly small, annual-only tax clients).
* A Clients should be communicated with in person or by phone, followed up with the formal announcement letter. If a transition in client service team is anticipated, the new partner or key staff contact should be introduced in person. The partner in charge of the client relationship will determine the timing and nature of the communication.
* B Clients should be called by their primary contact person and sent the formal letter.
* Because this merger is occurring at the start of tax season, we will be announcing the merger to C Clients with the formal letter that may coincide with our annual request for tax data.
* Any problems or questions that cannot be handled by the person initially fielding the call should be directed to the former Managing Partner of XYZ Company or the Managing Partner of ABC Company as appropriate.