

Press Release Standard Operating Procedure

Context: This Standard Operating Procedure (SOP) was developed at COMPAMY to govern merger and acquisition (M&A) integration communications across multiple acquired companies. The framework ensured legal compliance, brand consistency, and stakeholder alignment while maintaining efficient 3-5 day turnaround times. This process supported

Purpose: Provide clear, repeatable steps to plan, approve, and ship M&A communications safely and on brand. Use this for News You Can Use (NYCU), releases, and integration updates.

1) Guardrails for M&A communications

Material risk and confidentiality

- Treat all pre-announcement integration details as material non-public info
- Always save documents under code name
- Route announcements through Legal at the outlined checkpoints before any external or broad internal distribution

Required Legal gates

- Draft approved for legal review
- Final copy approval with distribution list
- Timing approval and embargo plan
- Post-send confirmation and archival

Distribution rules

- Limit pre-announcement circulation to named list only
- Use BCC or targeted channels for controlled sends

Ownership

- The communications lead owns timeline, checklists, and proofing
 - Legal owns risk checks and clearance
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2) Roles and responsibilities (RACI: Responsible, Accountable, Consulted, Informed)

Communications lead:

- Responsible for timeline, content quality assurance (QA), distribution execution
- Accountable for overall delivery

Communications director:

- Reviews content, supports stakeholder alignment
- Removes any blockers
- Consulted

Legal: Material risk review, confidentiality, timing approval. Accountable for risk

Design lead: Company header, signature assets, layout checks

Stakeholders (communication director, lead for acquired company, Integration leads):

- Provide facts, confirm accuracy and approve for their scope
- Consulted/Approved

Secondary contributors (Acquisition manager assigned, Employee Resource Groups (ERGs), Subject Matter Experts (SME)):

- Provide inputs and confirms program details.
 - Consulted
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3) NYCU workflow (per company/associate group)

Intake

- Capture source message, intended audience, and requested send date
- Identify which associate group it applies to (e.g., acquired company associates)

Asset prep

- Select header from Header Kit. Keep yellow accent on the same side across the issue
- Rename the header file to the associate/company name and month (see naming)

Draft

- Draft intro and sections. Require at least one clear call to action (CTA) relevant to the audience
- Prefer internal or ERG actions over generic external links

Review

- Proof for accuracy, style, and links
- Legal review if any item touches M&A timing, migration, or sensitive data

Test

- Send a test to self. Open on desktop and mobile
- Cross-check with parallel versions for consistent edits

Send and archive

- Send to the targeted list
 - File the final PDF/HTML and source copy. Update the changelog
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4) Header and Signature Kit

Selection rule

Keep yellow accent orientation consistent within an issue

File naming (headers)

header_[Associate/Company]_[YYYY-MM]_v01.jpg

Example: header_CompanyAssociates_2025-09_v01.jpg

Email signature assets

Prefer non-reversed (black) versions unless a dark background requires white

5) File storage and naming

Root

/M&A/NYCU/[AssociateOrCompany]/[YYYY]/[YYYY-MM]/

Contents per issue

01_source_[copy.md](<http://copy.md>)

02_header_assets/

03_images/

04_send_test_screenshots/

05_final/[date]_NYCU_[AssociateOrCompany].pdf

General naming

- Use PascalCase for entities. Use ISO dates. Increment versions with v01, v02
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6) Approvals and timing

Minimum lead times

- Standard NYCU: 3 business days
- With Legal review: 5 business days
- Release or migration comms: 7 business days

Approval order

- SME fact check
 - Manager review
 - Legal (if needed)
 - Final send approval
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7) Quality checklist (pre-send)

Content

☐ Clear CTA present and relevant

☐ Names, dates, product terms accurate

☐ Confidential details removed or approved

Links

☐ All links resolve and track as intended

☐ ERG or internal action links preferred

Layout

☐ Header orientation consistent

☐ Images have alt text or captions as needed

Proofing

☐ Second set of eyes completed

☐ Style and tone aligned to brand

8) Event communications addendum

Brand experience bar

- If tent/stage/podium and signage cannot be delivered, recommend deferring rather than diluting the brand

Apparel

- Order colored event shirts for core team to be identifiable. Collect sizes via quick form by T-21 days

Vendor framing

- Value the vendor's coordination across tent, audio/visual (AV), staging, food, and master of ceremonies (MC). Avoid nickel-and-diming single line items

Run of show

- Include media plan, speaking order, safety notes, and contingency for weather

9) Workback plan template

Start from target send date and work backward with dependencies.

Milestones

- Draft complete
- SME fact check
- Manager review
- Legal review
- Final proof
- Test send
- Final send

Example timeline

- T-10d Draft complete
- T-7d SME and manager reviews
- T-5d Legal review
- T-2d Final proof and test send
- T-0 Send

Contributors and credit

- Add a Contributors line on internal briefs and recaps
- Note origin of insights when relaying to stakeholders

Results and Impact

This SOP framework enables:

- Legal adherence
- Zero compliance issues across multiple M&A integration communications
- 3-5 day turnaround times for standard communications while maintaining legal compliance
- Consistent brand experience across all acquired company associate groups
- Scalable process supporting integration of multiple acquisitions simultaneously
- Clear accountability with RACI model preventing delays and confusion

Skills Demonstrated

- Process design and documentation
- Risk management and legal compliance
- Stakeholder coordination (Legal, Design, ERGs, SMEs)
- Quality assurance frameworks
- Change management during M&A
- File governance and naming conventions
- Timeline and workback planning