The Right Fit
8 secrets to a successful merger and rebranding

By Melissa Fors

Gain insight into how two leading health care organizations came together while honoring the history and legacy of each institution.

Several years ago, the Betty Ford Center for chemical dependency and recovery merged with Hazelden, a provider of drug and alcohol addiction treatment, to create the Hazelden Betty Ford Foundation, the largest nonprofit of its kind in the nation. If ever there was a “meant to be together” story, the merger of these two organizations fits the narrative: Our respective missions, visions, and values were already closely aligned; and our leaders had long enjoyed a friendly and collaborative working relationship.

Still, merging the assets and attributes of the two distinct legacy brands held challenges. Both the Betty Ford Center and Hazelden brought loyal, long-term constituencies to the merger table, including staff, donors, referents, and especially former patients. All of these constituent groups expressed concerns about a host of potential merger-related changes to organizations they had come to know, value, and support.

Of the utmost importance to both parties was ensuring the new brand would honor the history and legacy of each institution while championing the strengths and advantages created by the merger. Both parties also appreciated what “stronger together” would mean in terms of cementing the new entity’s leadership position in the addiction treatment and recovery field.

Here is an inside look at some of the key decisions and processes involved in this challenging initiative and eight key takeaways to inform your rebranding efforts.

Finding the Path Forward, Together
Our leadership wisely enlisted an outside agency to guide stakeholders through the process. The agency’s initial steps centered on conducting audience/market research, developing a naming and messaging architecture, and creating the new brand’s visual identity.

First, the research. In a national study designed to gauge the level of customer familiarity with both of our brands, the Betty Ford Center registered an aided-awareness rating of 72 percent compared with Hazelden’s 8 percent. The study also revealed that while the Betty Ford Center had a stronger consumer brand, Hazelden had the stronger brand among professionals, such as psychiatrists, counselors, physicians, and others.

In addition to conducting brand awareness and competitive identity studies, we facilitated focus groups with former patients, family members, and staff from both organizations to gain important insights. The focus groups provided the dual benefit of identifying constituent perceptions and expectations while also helping participants recognize similarities between the two organizations.

Developing a new name was another first order of business. Options on the table included assimilation (choosing one of the two names), reinvention (creating an entirely new name), business as usual (keeping both names), or fusion (blending the two names). We ultimately determined that fusion would garner the greatest brand...
recognition and visibility while also honoring the legacies of both brands. Retaining the names also helped to preserve the strong emotional connection felt by staff and patient constituencies. Hand in hand with rebranding, the agency created a new visual-identity system. The blue and green logo design (see Figure 1) represents the coming together of two nurturing organizations, much like two hands joining to create a comforting shelter of care.

Hope and optimism are also represented in the design, with its strong use of line and repetition in an upward motion.

Careful thought was given to the new brand’s color palette, typography, graphic design, and photography style as well (see Figure 2), with selections that:

- Expressed key brand attributes such as growth, dignity, positivity, approachability, relatability, and engagement.
- Conveyed a feeling of freshness and energy balanced with strength and expertise.

Secrets to a Successful Merger and Rebranding
1. Identify common goals at the outset.
   For us, the potential to help more people reclaim their lives from the disease of addiction was the ultimate common goal of both organizations. Every stakeholder and constituent group could wholeheartedly support this objective.

2. Stay true to your core values.
   There’s a lot of compromising that goes into the rebranding process, but hold dear to your core values as if your very reputation depends on it—because it does. The Hazelden Betty Ford Foundation brand is built on the shared, long-held values of respect, science, recovery, leadership, growth, service, and teaching.

3. Maintain close communication between leaders of the organizations.
   By keeping the lines of communication open, you can iron out differences as they arise—not that it’s always easy. Be prepared for some emotional discussions along the way. Two of my go-to mantras for staying the course and gently pushing forward during the process were: “Don’t sweat the small stuff,” and “This, too, shall pass.”

4. Bring in outside help to guide your rebranding efforts.
   Having a neutral, third-party perspective can be invaluable in helping you understand how your new brand is perceived. In addition to serving as a sounding board, your outside consultant will likely be a tremendous resource for research and data to inform your rebranding strategy.

5. Leverage the process to become more consumer- and SEO-friendly.
   Our merger provided a rare opportunity to rebrand our organizations to customers, this time supported by research and analytics about customer preferences, expectations, needs, and wants. We viewed it as a way to boost our domain equity, heighten our search engine rank, and expand our following.

6. Communicate and promote the rebrand.
   We introduced our new brand identity over a one-month period in a variety of ways, including new building signage; a new website; new external advertising campaigns and marketing collateral materials; and internal, staff-focused communications and celebrations at all sites.

7. Engage employees in the rebranding process.
   You are building a brand culture as much as a brand identity. The look, feel, and messaging of your brand should reflect and inform the work staff do every day. Employees can be your best ambassadors if they believe in your mission, vision, and values.

8. Celebrate milestones as you come together.
   In little ways (new employee lanyards and business cards) and big ways (executive communications and billboards), be mindful of fostering a sense of belonging among your constituent groups. Like any major change, a rebrand can be unsettling until they see where they fit in the scheme of the merger.

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