M&A Information Technology Best Practices
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M&A Information Technology Best Practices

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One of the most important aspects of many executives’ jobs can be making sure a merger, acquisition, or divestiture is successfully completed and anticipated benefits are realized. Additionally, these executives need to help ensure that the information technology (IT) aspects of the deal are appropriately addressed.

In 2012 alone, the global deal volume was over $2.6 trillion. Given the increasing importance of IT over the past several years, there has been a significant amount of change in how systems impact the ultimate success (or failure) of a transaction. As a result, it is hard to stay abreast of the latest system trends and best practices for mergers, acquisitions, and divestitures. This book is focused on providing executives with an understanding of some of the most important system-related areas that can impact a merger, an acquisition, or a divestiture.

**THIS BOOK’S SETUP**

This book has been written to serve as a guide to mergers, acquisitions, and divestitures for executives and their direct reports. It is written in nontechnical terms and focused on helping facilitate successful deals by appropriately leveraging the IT function throughout the transaction. In short, it is a guide to IT best practices for mergers, acquisitions, and divestitures.

This book is divided into the following parts:

- **Part I: Introduction (Chapters 1 to 4):** Many organizations can fail to successfully address the systems aspects of a merger, acquisition, or divestiture. This part includes a detailed discussion of the IT aspects of deals, the role of IT during those deals, how business and IT strategy can be aligned during a deal, and some key components of how IT needs to manage its operations during a deal.

- **Part II: Information Technology’s Role in Mergers, Acquisitions, and Divestitures (Chapters 5 to 17):** Information technology generally plays a critical role in the successful completion of a deal. As a result, it is
important the IT area be included from deal conception to closure. In
this part of the book the following key topics are discussed:

- The importance of conducting thorough IT due diligence prior to deal
closure.
- Why it is important to assess and address the IT infrastructure (e.g.,
the hardware, software, and networks) prior to, during, and after the
deeal closes.
- How IT can help capture significant synergies, including rationalizing
the applications portfolio.
- The importance of considering cloud computing as part of the deal,
and why the data aspects of the transaction must be addressed up
front.
- An overview of third-party contracts and why they need to be
considered during any deal.
- Day 1 and Day 2 IT implications and the importance of transition
services agreements (TSAs).

This part concludes with an overview of the IT-related risk, security,
and control aspects of a merger, acquisition, or divestiture and why they
need to be addressed.

- **Part III: The People Aspects of Mergers, Acquisitions, and Divestitures
(Chapters 18 to 21):** One of the most important aspects of a merger,
acquisition, or divestiture is addressing the people aspects of the deal.
It is imperative for executives to understand the people-related com-
ponents of these deals, whether they are the buyer or the seller. This
part of the book contains overviews of and best practices related to
the following aspects of these deals: the role of the CIO and CFO in
mergers, acquisitions, and divestitures; an overview of how to manage
the people side of the deal; and the importance of planning business
process changes impacting IT.

- **Part IV: M&A IT Project Governance, Testing, and Business Intelligence
(Chapters 22 to 25):** In this part, we review a number of topics critical
to the success of a deal: program management office (PMO) best
practices, the importance of strong IT governance during the deal, the
business intelligence–related aspects of a deal, and the importance of
testing the new systems.

- **Part V: Conclusion (Chapters 26 to 28):** This part of the book covers
a number of topics that are important to any executive involved with
a merger, acquisition, or divestiture: why deals fail and how to try to
avoid a similar fate; the critical success factors for a merger, acquisition,
or divestiture; and an overview of the key aspects the deals.
This book also includes valuable appendixes for readers as they embark on a merger, acquisition, or divestiture, including:

- Appendix A: An overview of an IT playbook that can be used to help guide the IT team during the deal.
- Appendix B: Sample IT checklists that can assist companies with making sure they are addressing the key aspects of a deal.
- Appendix C: Case studies.

Notes

2. “Best practices” represent the contributing authors’ collective experience of what works in the real world and hundreds of years of their combined time facilitating the successful delivery of information technology projects.
Given the rapidly changing merger, acquisition, and divestiture environment, it was critical for the material in this book to be as timely and relevant as possible and also to represent the collective 200-plus years of experience of the contributing authors. The contributing authors, listed here in alphabetic order, wrote the chapters as follows:

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