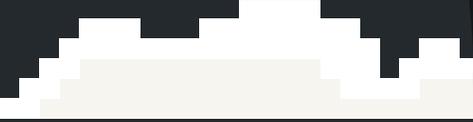


STREAMLINING YOUR IT OPERATIONS IN A MERGER & ACQUISITION

> CHOOSE YOUR OWN M&A ADVENTURE >



So, you're in IT and your company is about to go through a Merger and Acquisition. Now what? Besides getting into Marty McFly's car and turning back the hands of time to choose a different career as a pastry chef, the reality is, you're going to have to deal with this. Is it going to be pretty? Are you going to have the best time of your life? Are you going to regret getting into IT in the first place? Read on and we'll try to answer those questions and so much more.

With our ultimate Merger and Acquisition Misadventure, you get to choose your own path, make your own mistakes, and learn what you're in for along the way.

PRESS **START**



X START OVER



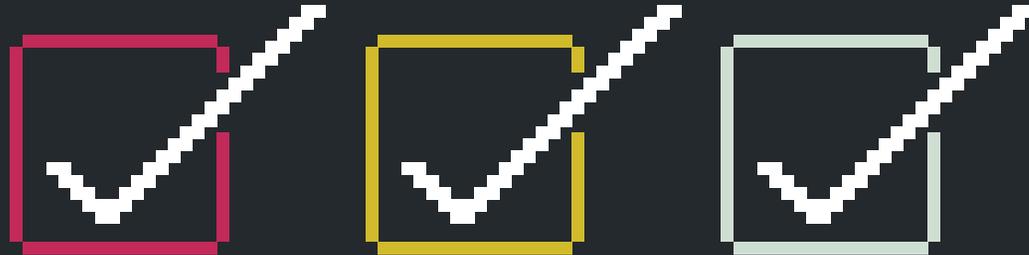
YOU CHOSE PASTRY CHEF IN SWITZERLAND

Congratulations on your new career! May you fill people's hearts and stomachs with many sweet delights!

TRY AGAIN

> NEXT QUESTION

X START OVER



YOU CHOSE GRIN AND BEAR IT

You've got this! Go forth and be amazing in your next M&A project.

TRY AGAIN

> NEXT QUESTION

X START OVER

Google

HELP!

YOU CHOSE PANIC AND GOOGLE

We've got you! Move onto the next section.

NEXT SECTION

> NEXT QUESTION



QUIZ TIME

How many mergers and acquisitions occurred in 2019?¹

A. 3,000

B. 17,000

C. 8,000

¹Forbes | Correct answer: **C. 8,000**

TO MAP OR NOT TO MAP...

The decision is made, there's an M&A happening. But both types of projects take time. How smooth the IT transition is depends on the route taken in the initial phase.

DO YOU:

- A. Create a map for both company's IT landscapes, including every application, every system, and every integration?
- B. Create a map for only the acquired company's IT landscape?
- C. I don't need a map because we're not going to even consider the acquired systems. We'll just shift everyone over to our operations.
- D. The only map I own is the one to Mordor. Now, move aside and let me begin this quest!

X START OVER



X 2

YOU CHOSE CREATE A MAP FOR BOTH

To determine an effective IT strategy and landscape early on, it's important to thoroughly map out all the technical capabilities, applications, and networks tied to each company's commercial and operational processes. You also need to consider the number of integrations in place across third-party systems and how difficult they might be to maintain. Finally, be sure to gauge vendor costs, agreements, and contract lengths. Is there a possibility of dissolving those contracts, and when could you do that?

At this point, you'll still want to operate separately, but you have an opportunity to understand and plan for what's next across your network, products and teams. A detailed landscape map will provide the transparency you need to decide what tech stacks to keep, rebuild, or transition over. Perhaps there are some early quick wins you can take advantage of from the outset, such as combining user licenses on third-party software.

NEXT SECTION

> NEXT QUESTION

X START OVER



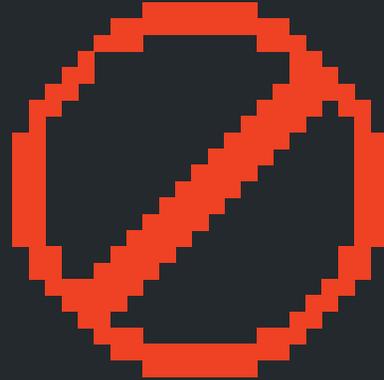
YOU CHOSE **CREATE ONE MAP**

It's not enough to just know the acquired company's operational setup. While it's a start, there are many choices that need to be made that will also affect your own IT operations. Without a full picture, you'll struggle with making informed choices and kicking off the actual migration work.

TRY AGAIN

> NEXT QUESTION

X START OVER



YOU CHOSE NO MAP

When the acquired company is absorbed into your business, the merger will be successful because they'll just follow your existing processes and systems. It's worked for you, so it'll work for them.

TRY AGAIN

> NEXT QUESTION

X START OVER



YOU CHOSE TO BEGIN YOUR QUEST

You have my axe!

TRY AGAIN

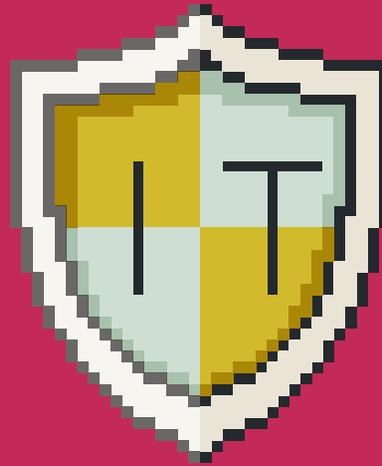
> NEXT QUESTION

ONE IS THE LONELIEST NUMBER...

With your IT landscape map newly established, you need a team to move forward confidently to the next step in the process.

WHAT DO YOU DO:

- A. IT assemble! Establish an integrated, Avengers-style team with people from both company's IT organizations.
- B. Ignore the new guys. They'll just have to learn how to fit into your department.
- C. Nothing! I'd rather be eaten by a shark than merge both teams. They're just too different. It's 'us' and 'them' for the now.



YOU CHOSE IT ASSEMBLE

Consolidating both teams from the outset will foster collaboration and engagement. By collaborating, you can benefit from technical insights and outside experience that will prove invaluable throughout the process. The last thing you want are members of the team worrying about their future prospects as you're relying on them to make critical changes.

By identifying key players from both sides early on, you have more time to get organised and focus on mission-critical tasks and other deliverables. You will also be in the best shape to accelerate changes to requirements as the transition unfolds.

NEXT SECTION

X START OVER



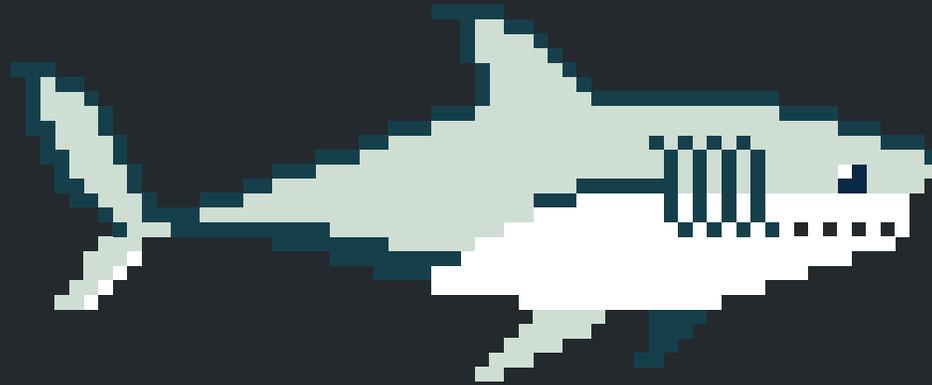
YOU CHOSE IGNORE THE NEW GUYS

Why change a well-run IT operation? The team works effectively together, and they'll work together as usual on this.

TRY AGAIN

> NEXT QUESTION

X START OVER



YOU CHOSE SHARKS

You don't really want this, do you? Perhaps re-consider.

TRY AGAIN

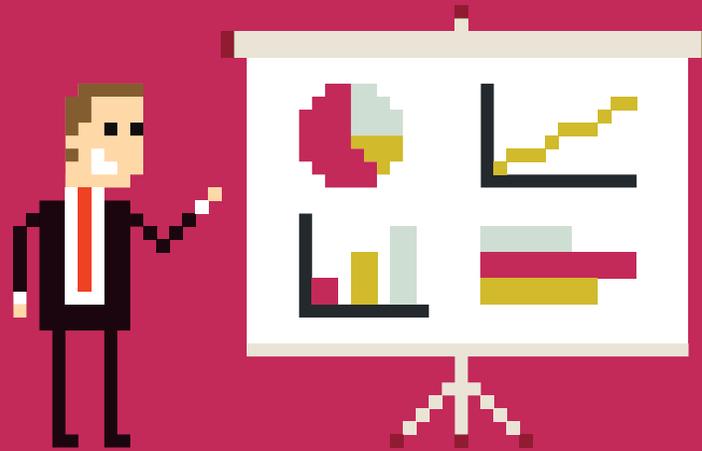
> NEXT QUESTION

TAKING NAMES AND JOINING PMOs

Now that you have an established IT team, what's next? As Project Management takes the reigns...

YOU CHOOSE TO:

- A. Join the PMO as IT's representative
- B. Keep IT separate from the rest of the merger project team
- C. Create a small-knit group of people you trust and operate in stealth mode
- D. Are you kidding? I still have nightmares about group work from school. No way am I joining the PMO!



YOU CHOSE IT REPRESENTATIVE

A disconnect between IT and the PMO is a common reason why M&A transitions become more complex than they need to be. IT must be included in the due-diligence process from the start to rationalize systems and make informed decisions for a flexible, streamlined IT infrastructure. Now that you have your landscape map and a plan for how you foresee the network, products and teams developing, it's important to bring the PMO into the fold to make sure you're engaging, as well as, the executive leadership and HR teams. The merger is going to bring changes into the organization which will require expert change management guidance, and you'll need support to encourage adoption into new ways of working.

Aligning with the PMO will also ensure you are well positioned to synchronize with the rest of company as developments emerge during the transition process.

X START OVER



YOU CHOSE KEEP IT SEPARATE

The PMO has a different agenda than IT in the preparations to merge. Their focus is spread across addressing activities within a number of other functional teams, such as finance and accounting, sales, marketing, customer service, and more. Taking ownership within IT will ensure the right standards, processes, and procedures are fully scoped and focused on the end goal.

TRY AGAIN

> NEXT QUESTION

X START OVER



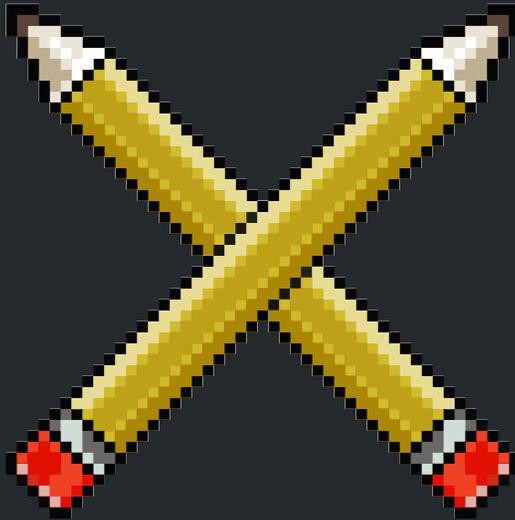
YOU CHOSE STEALTH MODE

Our team is the best at systems and security in the business. The wider business and acquired business will find out the plans at a later stage.

TRY AGAIN

> NEXT QUESTION

X START OVER



YOU CHOSE TO SKIP

Group work can be hard, but in this case, you'll need to work with all the other departments—especially HR.

TRY AGAIN

> NEXT QUESTION



DID YOU KNOW?

In our work on post-merger management, we have found that 50% to 60% of the initiatives intended to capture synergies are strongly related to IT, but most IT issues are not fully addressed during due diligence or the early stages of post-merger planning.¹

¹ McKinsey

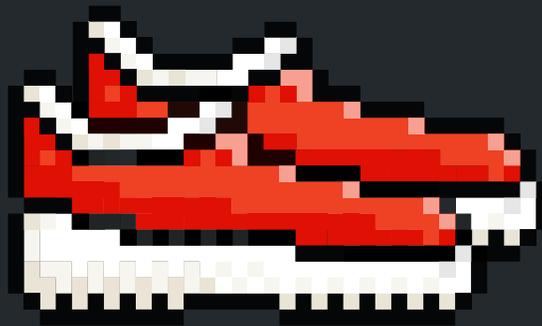
LEGENDARY LEGACY?

You've assessed the existing IT setups and now you need to consider the best approach for aligning to the wider business priorities. After some thought...

YOU'VE DECIDED THAT:

- A. This is the time to dig your heels in and maintain the status quo.
- B. This is the time to get rid of legacy systems and modernize.
- C. We've just modernized all our systems and tools. There's no need to repeat this project!
- D. What is this legacy sorcery? Our systems will always stand the test of time. They're classics!

X START OVER



YOU CHOSE DIG YOUR HEELS IN

This approach might ‘get the job done,’ but maintaining the ‘business as usual’ stance shouldn’t be your justification for opposing change. This is an exciting growth phase for the company, and it’s the perfect prompt for you to engineer a new infrastructure that reduces manual workarounds and costly inefficiencies.

TRY AGAIN

> NEXT QUESTION



YOU CHOSE GET RID OF LEGACY SYSTEMS

You've chosen to not only merge but modernize—and it's a great time to do this, because you'll have your new IT members on board to support you. This is where your IT Landscape Map comes in. Start by identifying which tools you can shed and which tools you want to keep. Are there any competing systems? What systems can be upgraded or combined? You'll need a clear thought-out communication plan and rationale behind any change you wish to make. There will always be detractors who don't agree with your decisions, so it's important to explain from your point of view what changes are coming and why – it'll make the change easier. Regularly speak with HR and key business stakeholders to understand all the critical pain points so a solution can be found to address multiple user needs.

NEXT SECTION

> NEXT QUESTION

X START OVER



YOU CHOSE KEEP IT SEPARATE

You are good to go then! One quick question—do you have Workday as part of your integrated suite of applications?

TRY AGAIN

> NEXT QUESTION

X START OVER



YOU CHOSE CLASSICS

Cheese, wine... IT systems? If it fits your purposes, you'll be ok!

TRY AGAIN

> NEXT QUESTION

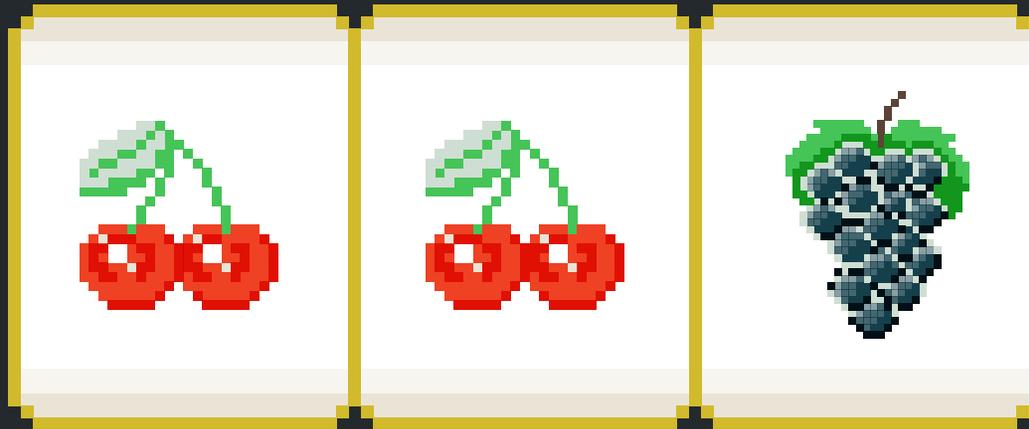
SYNC AND SWIM

The two companies are becoming one and the infrastructures of the merging companies need to do the same.

IT SHOULD FOCUS ON:

- A. Nothing. There just won't be any synergies to find.
- B. Only what applications are in place right now.
- C. Identifying how to best unify IT operations that will provide one source of the truth across the two businesses. You will have a forward-thinking outlook that will support future strategic decision making whilst improve visibility, security and compliances in the operations setup.
- D. Re-enact how you are going to singlehandedly get it all done with a Lego model of the Death Star.

X START OVER



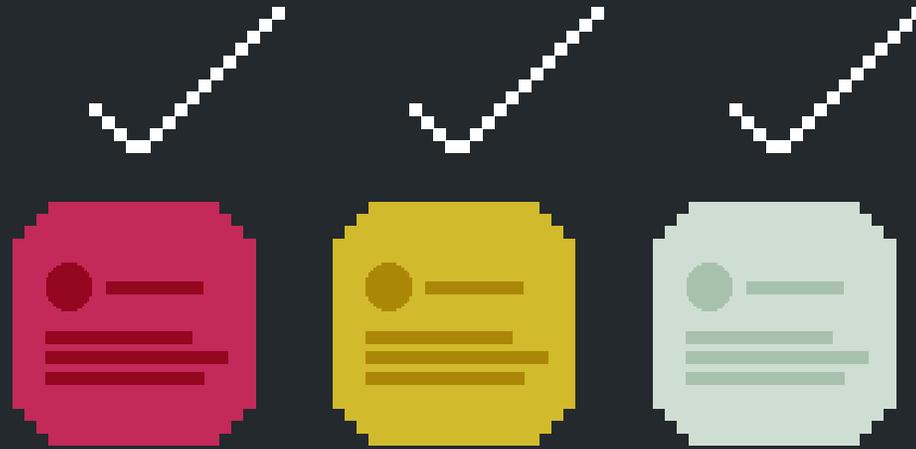
YOU CHOSE NOTHING

I mean, this is as unlikely as winning the jackpot in Vegas

TRY AGAIN

> NEXT QUESTION

X START OVER

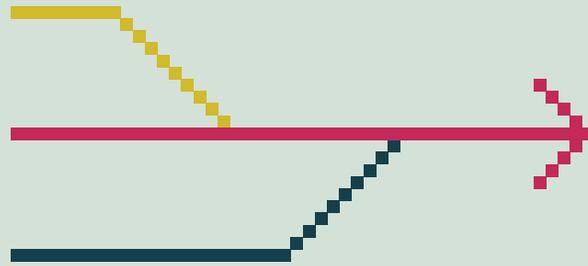


YOU CHOSE APPLICATIONS IN PLACE

Operational tasks across the business are getting done, and that's all that matters.
It'll continue to run in the same way.

TRY AGAIN

> NEXT QUESTION



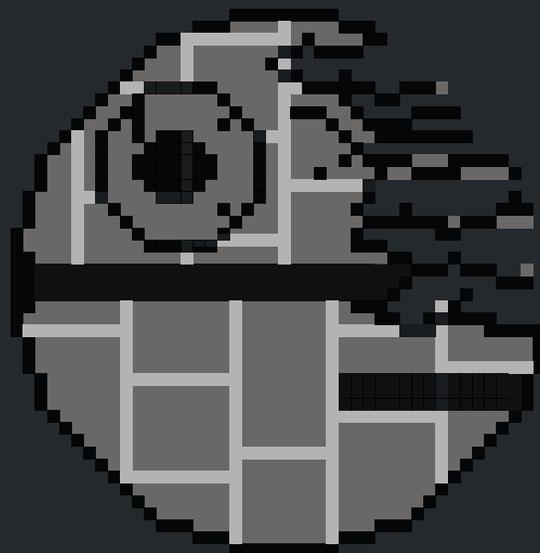
YOU CHOSE UNIFY IT OPERATIONS

Understanding strategic synergies and building this into the decision-making process will drive long-term value during and post-merger. Now that you have a solid view over all applications and IT capabilities, you can rationalize and blend technology landscapes in a best-fit manner. A well-planned approach will highlight how you can share resources and technology budgets, as well as show you a path to more streamlined systems. In line with your plans to capture this opportunity to modernize, how can you re-think customer data to allow for more cross-sale opportunities? Can you shift to a unified system of record? Is this the time to introduce more standardization now that the company is growing?

Decisions about HR, procurement, and finance systems are the first that get made, and these systems need to align across both operations so that there's one source of truth. You'll need to ensure that any impacted teams are aware of the IT operations plan at this stage so they can enable additional support and team resources, e.g. HR, Payroll, and Finance teams.

You also need to take into consideration that both businesses need to remain fully operational during the transition. This adds an additional layer of complexity and risk management. You need to be able to safeguard differing sets of data to avoid any breaches during this time while still meeting any regulation requirements from international deals. Running systems side-by-side will help facilitate a smoother transition when the new environment is ready.

X START OVER



YOU CHOSE DEATH STAR

Hey, everyone likes Lego right?

TRY AGAIN

> NEXT QUESTION

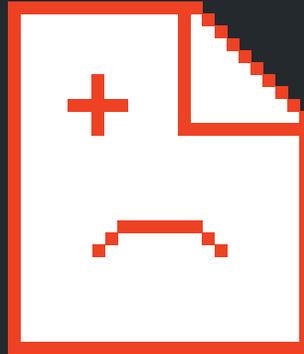
DATA OR THE OSTRICH — WHAT COMES FIRST?

Getting your master data correctly and expertly into a new system is business critical. You want to have a seamless transition and capture all legacy data.

WHAT'S YOUR APPROACH:

- A. It will all work out in the end. There's no time to waste and you'll figure it out as you go.
- B. Take a measured amount of time to prepare, configure, and convert any data.
- C. Act like an ostrich and bury your head in the sand. Surely the data is taking it a step too far.

X START OVER

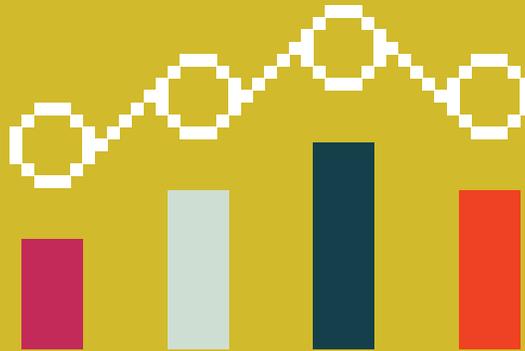


YOU CHOSE IT WILL ALL WORK OUT

Taking this action could result in the company violating regulatory compliance laws and cause a host of detrimental problems, including fines, a loss of reputation, and poor data quality.

TRY AGAIN

> NEXT QUESTION



YOU CHOSE PREPARE, CONFIGURE, CONVERT

First, you need to determine which data you want to migrate to which systems. Referring to your IT map, you have an idea of the systems you need to create a scope for and the different taxonomies for each. Identify what data is current or obsolete and do the same for the acquiree data set. The same approach allows for standardization between the data sets, which is essential for a smoother transition when it comes to consolidation.

Where is the data stored currently? How is the data currently backed-up? With automation and innovation front of mind, it's the perfect time to re-think how you deliver IT services to the wider business. Procurement, finance, and employee systems, such as payroll and benefits, are essential to keeping the business operational during the transition. The smoother and more quickly you can integrate these core systems will restore trust in both sets of employees throughout the ongoing change.

X START OVER



YOU CHOSE ACT LIKE AN OSTRICH

Time to brave it out – but don't do it alone! Bring an external partner in to support you.

TRY AGAIN

> NEXT QUESTION

YOU'RE GOING THROUGH CH CH CHANGES

Merging can bring a sense of chaos and turbulence to current and future employees. But this doesn't have to be the case. There are ways you can bring stability into the business with a change management plan in place. When it comes to people's day to day jobs, there will be an operational shift, but both IT and change management have a key role to play, in helping employees prepare for the changes ahead.

Referring back to your IT Landscape Map and your assessment of systems across both companies, you need to have a clear vision that is aligned with your executive leadership team and HR to handle cultural and integration challenges.

YOUR NEXT STEP IS:

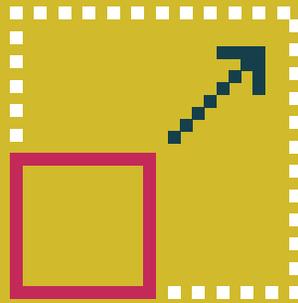
- A. Select Workday. As the acquirer, you have this deployed already, but you need to further integrate the new employees into the system in the best way possible.
- B. You don't know! Both companies are currently on outdated, or not fit-for-purpose systems, and you're looking to modernize and deploy a flexible, scalable solution that will complement your new merged culture.
- C. Choose the right path and support for the business ahead. Each company is using different enterprise cloud applications. One is using SAP and the other is on Workday. You're looking for guidance and understanding into what to expect.



YOU CHOSE SELECT WORKDAY

Consolidating Workday systems is a practiced—and therefore quicker—process. With in-built and standardized processes already up and running, disruption is minimised as you can feed in the new master data to align with the current setup. There are payroll administration services designed to provide you with as little or as much support as you need. OSV can also support you with onboarding those new employees, ensuring they understand their responsibilities and guiding managers to new ways of working through training sessions, communications, or learning collateral, all to reduce headaches and their administrative burden. For more information about how OSV can help, [contact us.](#)

NEXT SECTION

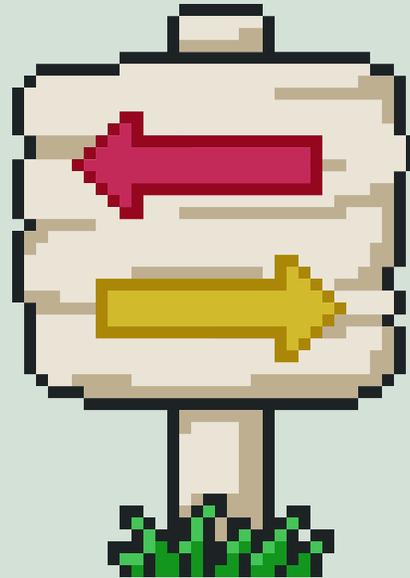


YOU CHOSE A FLEXIBLE, SCALABLE SOLUTION

You're not alone, but now more than ever businesses are demanding better results even faster. So why haven't companies like yours embraced a cloud-first technology approach already? Fear of change is one of the main reasons. Breaking away from long-held habits and legacy systems during an M&A is essential to avoid fragmented data systems, insufficient tools that are not going to support the business' next growth phase, and an even lengthier transition period.

Adopting new technology, such as Workday, makes M&A processes faster and easier. With a single system for finance and HR, you can achieve real-time, standardised data, better synergies, and the ability to onboard employees from day one. As a Workday deployment and services partner, OSV can help you identify the scale of the impact on your business with realistic timescales, resource requirements, and effort to ensure you are not just implementing new technology but embedding new ways of working. Learn more about OSV as a Workday implementation partner [here](#).

X START OVER



YOU CHOSE THE RIGHT PATH

Whatever your choice—to consolidate with Workday or to maintain integrations—we have solutions that can help. By choosing Workday and OSV as your implementation partner, we can help you identify where there will be an impact to end users or HR, Finance, and Payroll teams, as new integrations are implemented. We ensure you are always able to service the end customer and are capable of doing what you do best while minimizing disruption to employee productivity. Discover our deployment experience [here.](#)

NEXT SECTION

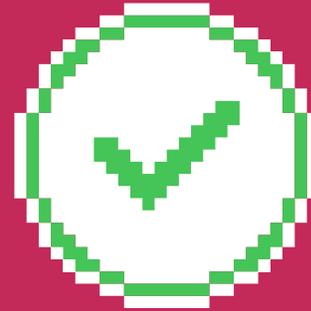
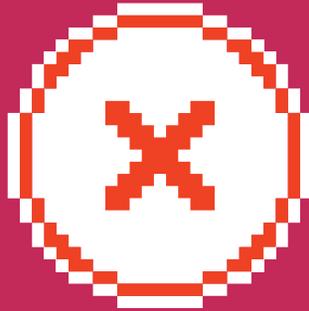
> NEXT QUESTION

BUGS OR BAGGAGE?

With any new environment, it's time to test the systems.

YOU CHOOSE TO:

- A. Undergo a planned testing strategy. It's crucial to the consistency and ongoing performance.
- B. Ignore what's best practice and continue in that stealth mode to go-live.
- C. Book an extended holiday. And why not? You've been feeling like taking a sabbatical for a while.



YOU CHOSE PLANNED TESTING STRATEGY

Undergoing sufficient testing will provide the validation you need to understand what's working and what still needs to be fixed. At this point in the M&A timeline, you are working through a phased migration plan and can thoroughly verify all aspects of the systems you want to test. Checking for errors and system bugs is essential.

Any constraints or defects identified at this stage will help to minimize post-deployment troubleshooting or IT resource support.

It's also important that the end-result should meet both the intended business and technical requirements. Input the data in the system and functionally test the data outcomes generated. How reliable is the data running in the system? Are you testing a real day-to-day working scenario? By testing you can truly gauge a measure of effectiveness against end-user expectations. With this in mind, you can compare actual and expected results to continuously improve quality and output.

X START OVER



YOU CHOSE **STEALTH MODE TILL GO-LIVE**

You need to be able to evaluate whether the system's working or check whether the usability is performing as intended. If this isn't done, the system could be riddled with errors and cause further disruption to usability and the wider project implementation timeline.

TRY AGAIN

> NEXT QUESTION

X START OVER



YOU CHOSE EXTENDED HOLIDAY

It's certainly well timed. The world is your oyster – enjoy your adventures!

TRY AGAIN

> NEXT QUESTION

THE END-USER IS NUMBER ONE

Deploying any changes to existing systems or implementing new software requires end-user training and support.

WHAT APPROACH DO YOU TAKE WITHIN THE IT OPERATIONS TEAM:

A. The team will help on a technical side, but otherwise, users can Google their questions.

B. Provide designated resources aimed at offering software support and ongoing training to the business and its users.

C. The project timelines are expected to be delayed, so we wouldn't have thought about any training and support. This will be thought about afterwards and upon request.

X START OVER

Google

HELP!

YOU CHOSE GOOGLE

Google?! Let me help you, take path B.

TRY AGAIN

> NEXT QUESTION



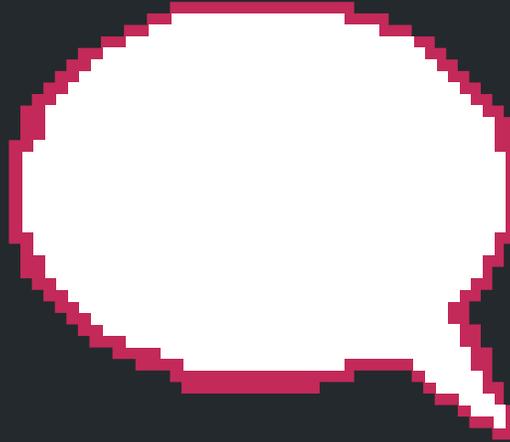
YOU CHOSE PROVIDE DESIGNATED RESOURCES

It's crucial to provide adequate support and training for the end-user for every new or adapted system implemented. It's important to compile and maintain a master list of your infrastructure as you phase in new systems during the merger so you can effectively plan ahead for support resources and are ready to offer transition guidance from the get-go.

However user-friendly or intuitive the system may be, users still need training as new technology adoption will lead to a transformation in some way, such as different business processes or changing job responsibilities. Users will need access and information on how best to operate the new systems, so you need to prepare support materials in addition to being available to solve any complex problems that arise. While technical support may be handled in-house, given there may be numerous new software implementations and changes throughout the M&A, you could consider outsourcing application support. The right partner will provide a dedicated team to support with user adoption, improve the effectiveness of the software, and minimize any resistance to change.

If Workday is a preferred software of choice, OSV provides in-application services and support, including Issue Management, Employee Help Desk, and Application Monitoring. Learn more about our professional services [here](#).

X START OVER



YOU CHOSE AFTERTHOUGHT

This isn't the best way to encourage user adoption. If employees are struggling to use the software and fulfil their responsibilities that will increase job frustration and add to the pressure within IT operations to implement a support and training strategy.

TRY AGAIN

> NEXT QUESTION

MAKING WORKDAY MORE DOABLE

Workday is a powerful enterprise software with the flexibility to adapt to your needs. But are you seeking additional services to support you? Whether you're looking for deployment, HR transformation, or strategic consulting, OSV has you covered.

DEPLOYMENT SERVICES

OSV provides extensive deployment and system integration experience across the Workday ecosystem.

Discover our best-in-class approach to Workday deployments in our fact sheet.

> [DISCOVER MORE](#)

HR TRANSFORMATION CONSULTING SERVICES

HR Transformation empowers organizations to evaluate and refresh existing business processes so they can operate more efficiently and effectively. Learn more about our HR transformation consulting services.

> [LEARN MORE](#)

STRATEGIC CONSULTING

Extend the value of your Workday investment with services designed to help you leverage organizational transformation and change management. Our consulting service enhances insights and translates them into actionable strategy so that you can focus on what matters – growth and maximizing business impact. Download our dedicated factsheet on OSV's approach to strategic consulting.

> [DISCOVER MORE](#)

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GAME
OVER