THE ULTIMATE GUIDE TO

Merger and Acquisition Due Diligence

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INTRODUCTION

Technology due diligence is one piece – though an integral piece – of the much larger merger and acquisition (M&A) puzzle. All business leaders understand due diligence is an essential step in the M&A process. For acquiring companies, understanding the technological landscape of the company it plans to acquire is key to understanding business value, risks and whether information technology (IT) will need investment or can quickly scale for business growth.

In 2022, challenges such as rising interest rates and the possibility of a recession slowed mergers and acquisitions. In fact, The Wall Street Journal **reported** that "the total value of deals announced globally fell 37 percent last year from 2021's record high, to $3.61 trillion," noting it's the largest year-over-year percentage drop since 2001. Still, we expect to see gains in the merger and acquisition of companies in 2023 as acquiring companies learn to reduce risks despite market volatility.

INTRODUCTION

Used to vet companies for potential investments, the due diligence process allows an organizational buyer to ensure the goals, culture and strategy of a future combined business closely align for their success. It is essential to a successful growth initiative through acquisitions to equip the people in your organization with the right talent, capabilities and capacity.

But what information do you need to conduct IT due diligence? What steps do you need to take to perform a technical assessment, and how do you go about that last necessary step to this juncture: integrating your IT systems post-merger?

In this white paper, we detail the following:

- Why an acquiring company should assess business processes and IT protocols of the company it seeks to acquire;
- What the essential elements of conducting an IT due diligence assessment are; and
- How to ensure a successful post-merger integration.

After you've learned the importance of due diligence during a merger and acquisition, you'll understand the importance of — and how to perform — a successful IT post-merger integration (PMI).

Why Should Business Process and IT Be Part of Due Diligence?

Due diligence, business process and IT protocols are as important as reviewing general company information, company management and employees, financial statements, legal matters, products and services, and competitive analysis. Gartner defines business process as “an event-driven, end-to-end processing path that starts with a customer request and ends with a result for the customer. Business processes often cross departmental and even organizational boundaries.”

A common misconception is that if a company is operating profitably today, it has the appropriate processes and IT systems to sustain the business and support future growth opportunities. Often, this isn’t the case, and an early evaluation can help the acquiring company avoid deal-ending pitfalls or high unforeseen expenses down the road.

WHY SHOULD BUSINESS PROCESS AND IT BE PART OF DUE DILIGENCE?

Companies must understand the relationship between key business processes and IT when evaluating whether merger discussions should move forward, as some process and system gaps may be too costly to achieve targeted returns.

An example is when Microsoft acquired Nokia in 2013 to start a mobile subsidiary. At one time, Nokia was the world's biggest mobile phone handset manufacturer. In fact, Nokia entered the 21st century still as the undisputed king of cell phones, having surpassed 100 million manufactured phones in 1998, according to **Slidebean**.

In that year alone, they had a sales revenue of $20 billion and, by 2000, had a market share of 30 percent in the mobile phone market. The signs of struggle were there, though. The introduction of iPhones in 2007 and Google acquiring the Android OS a year later set a new stage for the industry. In short, Nokia was already struggling to keep up with developments when Microsoft acquired it.

In 2015, Microsoft took a $7.6 billion write-down on its Nokia acquisition and resold it to a Finnish company, ceasing operations of its mobile business the next year.

Beyond the process and IT infrastructure, the acquiring company should work to understand a target company's **IT risk posture** and to uncover whether it will need investments to shore up weak security defenses.

Buyers should identify, evaluate and confirm business practices and the company's **IT infrastructure** early in the technical due diligence process to assess potential risk and value, if any, to the proposed business merger. Additionally, executives should consider a high-level integration plan to help lay out the transition to a new, combined company.

DUE DILIGENCE BUSINESS PROCESS AND IT EVALUATION ACTIVITIES

Several evaluation activities can help ensure a successful merger. This includes achieving a comprehensive understanding of:

- Business process and IT system compatibility
- Time available to complete the review
- Technology opportunities
- Merger data room availability
- Nature of business relationship (friendly or adversarial)
- Resources available (internal and external).

A deeper dive into the process will help shape the nature and scope of the due diligence evaluation plan.

COMPATIBILITY BETWEEN ACQUIRING COMPANY AND TARGET

There are many questions you must ask yourself before merging, including:

- Do manual or automated solutions support critical business processes?
- Does the company use spreadsheets, or does it manage processes with something more automated, like robotic process automation (RPA)?
- Does it manage its databases in-house or through a third party?
- What is the makeup, quality and accessibility of data?
- What are its cybersecurity and other IT-risk vulnerabilities?

If RPA is part of the company's core business processes, evaluate if it effectively generates an ROI through tangible or intangible benefits like cost savings, increased customer satisfaction, higher throughput or other measures.

It's important to note that even if businesses have the same or similar systems, it doesn't always equate to compatibility. Frequently, a business customizes solutions to suit its specific needs. It's also critical for an acquiring company to understand how a target company deploys its IT systems to meet your company goals, whether through scaling, automation, synergies or other growth activities.

It will be important to overall post-merger success for you to create a transition plan for integrating and sharing information and standardizing best practices.

CONDUCTING AN IN-DEPTH IT SYSTEM EVALUATION

By proactively identifying critical issues and risks, an acquiring company is in a better position to strategize and develop a thorough mitigation plan. In addition, an assessment's findings can often prove helpful in negotiations.

A comprehensive technical due diligence assessment weighs the following questions:

- **How effective is the IT infrastructure in business architecture and operational performance?**
- **What documentation of current IT systems and hardware infrastructure exists?**
- **What are the licensing requirements?**
- **What do the IT governance processes and documentation encompass?**
- **What cybersecurity procedures exist?**

  Is there a regular testing protocol in place?
- **Does a business continuity plan exist?**

  How comprehensive is it?

  Has it been tested?

  Is there a periodic testing process?
- **Is there a dedicated IT capital budgeting process?**

  How robust is the budget?

  Does a backlog exist on open capital projects? If so, what are the implications?
- **What are data center and cloud environment implications?**

  Is the data center located on-site, remotely or both?
- **What is the server structure?**

  Is the company using virtual servers?
- **How old are the IT hardware and software?**

  Are there any defined replacement or upgrade plans?
- **What backup, recovery and disaster recovery processes exist?**

  When was the last time the company used or tested them?
- **Are there any proprietary IT systems that require a carve-out of value during due diligence?**

  Do they require specialized skills to support them?
- **How customized are the IT systems?**
- **How frequent are IT software updates?**

  What testing protocols exist?

  Is there documentation of test results and approvals?

BE THOROUGH IN BUSINESS PROCESS DOCUMENTATION ANALYSIS

Like IT system evaluation, taking stock of business processes is a critical step in the due diligence process. Companies should emphasize this step when required to follow regulatory or other compliance rules, such as Sarbanes Oxley (SOX), General Data Protection Regulation (GDPR), the Health Insurance Portability and Accountability Act (HIPPA) and more.

Organizations should work to fully understand the business process testing frequency and the associated documentation of testing results or findings through **business process management** (BPM) and business process testing (BPT), which focus on end-to-end business processes. In this analysis, put the company's handling of business process write-ups, process flow documentation, integration of business processes with its existing systems and infrastructure, and how they maintain documents under the microscope. How applications interact and affect the company and its goals can help determine if the systems can support its strategy.

"Business process management (BPM) is a disciplined management approach and methodology that provides end-to-end process understanding, visibility and control while ensuring effective organizational communication. Some organizations discuss BPM as process or technology, but we view BPM as the convergence of process, people and technology," said Colleen Ohl, Centric Consulting's National **Operational Excellence** Co-Lead.

BPT can include manual and automated steps within the company's **application lifecycle management** framework. Business process testing leads to process improvement; greater efficiency, as all systems are tested and refined; cost savings realized through time saved and other efficiencies; and reduced risk of error.

PEOPLE ARE AN IMPORTANT PART OF DUE DILIGENCE

While financial implications are often the central focus of due diligence, it would be a mistake to underestimate the significance of one of the most critical assets to most organizations — the people within a company. We all know mergers are vulnerable to failure, and "the one thing all have in common is people. Mergers and acquisitions fail more often than not because key people leave, teams don't get along or demotivation sets into the company being acquired," Forbes Councils Member David Garrison notes.

We can learn from acquiring companies that thrive. Cisco, for example, has successfully acquired more than 200 companies. In discussing its acquisition strategy, Cisco notes how critical people are to the M&A process. "The talented people who join Cisco through acquisitions are an important part of our DNA, accounting for 20 percent of the whole company and 20 percent of the leadership – meaning one in five Cisco employees today are from an acquisition. What's more, about 80 percent of acquired team members continue to be part of the Cisco team three years after joining," Cisco said in a blog commemorating its 200th acquisition, adding that the number "represents a market-leading approach to openness and a lack of technology religion that puts the customers and partners first."

If you understand the people on the front lines during due diligence, it will help your team make decisions about leadership, capability gaps, skills retention, culture and potential friction points to address.

Structure your IT support staff and operations team's due diligence around answering questions related to organizational structure. Technical staff is a company's lifeblood. They have familiarity with the company's technology platforms, vendors and how technical operations are interconnected. These key employees will help guide technological changes within the newly-merged organization and help work through any transformation efforts.

Don't forget that in many mergers or acquisitions, there are costs associated with retaining key employees, as well as severance implications for those in redundant positions. Identifying and planning in the early stages of your assessment will help you create a clearer picture of the investment's organizational fit and long-term return.

A skills assessment, key personnel identification, flight risks and personnel will overlap and help you as the buyer understand the bigger IT picture and any potential barriers that may occur during the merger and acquisition process. Teams may resist change if they feel the company's legacy crumbling. Organizational culture alignment will help the new company avoid employees leaving and long-term attrition due to a cultural misalignment. A **people and change consulting** firm can help an organization better understand this aspect of IT due diligence.

RISK IS PART OF ANY BUSINESS DEAL

As executives know, risks come with all mergers and acquisitions. When you acquire a target company, your company assumes its liabilities and assets.

Regarding IT and business processes, evaluate whether the systems are sufficient to continue operating the business today and allow for the scale and growth you want to achieve. **The company may also have something unique that adds value to the business proposition, and you could transition it to other parts of your current business operations.** Leveraging these positive attributes will prove valuable in the post-merger integration.

Companies are taking a closer look at the impact a critical event, such as a recession, could have on the overall company, especially as IT plays a more integral role in defining its internal processes.

Business continuity and outside forces that impact it are becoming an increasing part of due diligence. Evaluating key risks helps determine if the combined company can withstand a worst-case scenario. In your IT risk assessment, look for internal resources available, compatibility and gaps in IT, security, potential loss of key resources or data, outside vendors and areas where you can create more efficiency.

To better understand the risk to the combined company, create a comprehensive list of technology or operational gaps that may impact the transaction or post-deal integration and other potential pitfalls that might present themselves. Each element should answer a question about business or system processes and how it affects the company overall.

For example, a gap in data security standards could mean greater risk to the newly merged business unless you identify steps to bring less secure practices in line with the higher standards of the two organizations. You should prioritize this and any other gaps identified according to the anticipated risk they pose, and you should investigate and remediate as deemed appropriate.

Another example is if a business continuity plan or disaster recovery plan is non-existent, outdated or substandard. This could put the merged company at risk. You will need to plan to address this gap if the companies move forward with the acquisition or merger.

The answers to these and other foundational questions may reveal other due diligence questions. While the CIO is the primary player in IT due diligence, this leader will have to work closely with other company stakeholders, those on the IT team and third-party vendors.

A WORLD OF POTENTIAL

Evaluating IT, business processes and people are critical steps in a comprehensive due diligence process. Armed with the right questions and the right team, this evaluation will help determine if a combined organization will be a sound, profitable business decision.

Due diligence is the best method for a company to protect itself during the merger and acquisition process. Often, companies overlook technology as part of the overall scope of due diligence, but we can't overstate its importance.

Technology, and the risks it incurs, plays a major role in the operation of companies today. It has a direct impact on the overall well-being of a company. Conducting IT due diligence upfront can help acquiring companies avoid unplanned costs, circumvent hidden vulnerabilities, and aid in negotiations between the involved companies.

Steps to Conduct IT Due Diligence in the Merger and Acquisition Process

We already discussed the value of incorporating IT and business process reviews into due diligence, but what are the steps in conducting an IT due diligence assessment? Next, we've outlined key phases of a successful assessment approach.

EVALUATE SCOPE EFFORT AND INITIATE

While this phase may seem simple, you'll set your due diligence assessment up for success if you clearly define your project and adequately prepare.

- **Identify the Scope:** The scope of any IT due diligence process should involve technology leaders from both companies who come together to make sure there's a shared understanding of the process and expected outcomes. Goals may vary by the scale of the transaction, risks involved and opportunities you will realize through the merger or acquisition.

- **Create a Team:** To really understand the IT picture of a company, comprise the due diligence team of members from both the buyer and the acquired company. Senior leaders, like the CIO, if they have one, and management from both sides should represent the companies and employees. These individuals will understand hardware, software, operations, culture and other considerations.

- **Select an Approach Method or Style:** What does your approach include? Because each negotiation is different, parties at the target company may be friendly or hostile. Discuss what you should or shouldn't say and how to work with team members. It's important to tailor your due diligence methodology and approach style to the target company culture.

- **Create a Resource Plan:** Once you've identified key players on the team, establish contact information and sync calendars so everyone can stay involved throughout the process. Those selected will help define strategic objectives, set direction and ensure you can resolve issues promptly.

- **Issue a Document Request:** Issue a request for necessary documentation. These might include architectural diagrams, contracts and license agreements, partnership agreements, employee information and other technology-related documents of value.

- **Review Privacy Requirements:** Acquiring companies should ensure IT understands the confidentiality and privacy requirements of the target company. Various laws govern the use and disclosure of personal information during and after an acquisition, all of which you should make sure you thoroughly understand.

- **Build a Project Charter:** Build a charter document that outlines the project plan, resource requirements, timing, objectives, stakeholders, and how you will carry out the project. The project charter recaps the project's scope into a comprehensive document you will use throughout the due diligence process.

ASSESS THE CURRENT STATE

To assess the current state in your IT due diligence, the acquiring company must gather information through interviews, system audits and relevant documentation. Evaluating the IT infrastructure, including business operations software and licensing, will allow the acquiring company to better understand whether the interests of the two businesses align strategically and provide insights into the target company's system capabilities, future investment needs and IT risks.

As we mentioned, other key areas when assessing the current state include the target company's IT risks. Cybersecurity, data loss protection, contract liabilities, technology, cost base and employee flight risks are some areas you should evaluate.

Because the acquired company's legal obligations may transfer to the purchasing company, ensuring a comprehensive current state assessment will help keep companies from engaging in time-consuming and costly legal disputes. A legal advisor can – and should – assist the team in understanding legal obligations that could impact the merged company both short- and long-term.

Once you've had conversations with leaders, IT staff and other parties and carefully documented your findings, you're ready for analysis.

ANALYZE YOUR FINDINGS

Gathering data and metrics is futile unless used to help assess and mitigate risk in the merger and acquisition process. Analyzing your findings is the final step of assessing the current state and will prepare you to create a final report you can present to both acquiring company and target company leaders.

As you review the information collected, answer critical questions such as:

- **How do the IT governance process, architecture and budget align with the company's objectives?**
- **Are there gaps in technology that will require significant investments?**
- **What risks and vulnerabilities exist?**

This process also enables you to find opportunities, whether it's to prepare for company growth, acquire technology, synergize operations or other driving factors for the acquisition, which will help you integrate post-merger.

It's easy to overlook technology in due diligence, but taking the right steps to evaluate all aspects of IT and IT processes is essential in planning post-merger activities as the deal progresses. While conducting due diligence is not easy, it's well worth the effort to identify assets and risks that may assist in overall negotiations and help ensure there are no surprises after the merger or acquisition.

Once a merger has taken place, the new company should work to create a successful IT post-merger integration (PMI) by designing the future state and building a roadmap and execution plan.

Post-Merger Integration is a Critical Part of the Merger and Acquisition Process

Mergers and acquisitions, particularly when it comes to IT, don't end when you wrap up due diligence and the ink dries on the contract. After you've conducted due diligence, identified synergies, cost savings and innovation potential, and addressed risk factors, it's time to begin post-merger integration.

Also called M&A integration or post-acquisition integration, this process is critical to ensuring the two former companies operate seamlessly as one and create the expected value for the acquiring business. Much of the IT post-merger integration revolves around infrastructure, software applications, changing business processes, and redesigning the company to streamline, add new skills and eliminate redundancies.

Ideally, during the due diligence process, the companies will discuss potential integration options, as well as align the goals and budget for this phase of the project. The reality, however, is the decision of what route to follow often doesn't take place until after the transaction. To help create a smoother transition, select a modeling option before the merger. Once complete, everyone will know what to expect and how to move forward in the new organization.

MODELING OPTIONS FOR IT POST-MERGER INTEGRATION

Before getting into integration, both parties must agree on modeling. There are several modeling options for you to consider, but it often depends on how the acquiring company plans to operate in its end state. Here are a few to choose from:

1. **Independence** — In this model, each company operates independently of one another. Maintaining independence can be beneficial if the previously separate organizations have an established brand and reputation, and retaining the identity and skills of each is part of the overall business strategy.

2. **System Connectivity** — In this method, IT leaders connect each company's systems so they can securely share information. Systems must share data to be effective. System connectivity enables the organization to realize the full value of software systems the company already uses through strategic coordination and management of systems.

3. **Shared Systems** — A company creates a common system or set of software applications with the shared systems model. They can continue to operate independently and run in separate instances, or the organization can merge data to create a unified system. This can help increase efficiency, lower costs and eliminate silos.

4. **Single System Adoption** — A single system adoption is a full integration in which the acquired company moves its systems to those of the acquiring company, and the acquired company eliminates its systems. This helps improve economies of scale and results by eliminating redundancies between IT systems.

5. **Hybrid** — A hybrid model may consist of any mix of the above operating models, depending upon the goals and objectives of the company, budget and other factors. Using a hybrid approach allows companies to take the best of both companies and implement proven strategies, helping reduce a sense of unease among employees in the acquired company and building trust throughout the organization.

Once you've identified a model, the acquiring company will follow the final steps of a successful assessment approach: designing the future state, building a roadmap and execution plan, and executing the roadmap.

DESIGNING THE FUTURE STATE

After selecting a model, design the company's future state with regard to IT. This step will outline what the company looks like in terms of IT once the integration is complete. A clear understanding of the objectives and the journey to get there is essential to the ultimate success of IT post-merger integration.

Architect the future state of IT in the following areas:

- **Organization:** Evaluate the IT architecture needed to support your selected operating model. IT architecture should embody the concepts, processes and guidelines that govern acquiring, building, modifying and interfacing your IT resources to support the selected model (from above).

  As such, your IT architecture plan needs to consider every aspect of the business. This includes the business as it exists today with its current demands for technology and how you expect the business to change based on anticipated future needs.

  To create a sound IT architecture, you also need to understand the data and information processing assets required to meet the business objectives. Then decide on the governance processes you will use to support your chosen integration model.

  This means knowing who the stakeholders are and how they will participate in the governance process. Finally, you need to know whether your IT architecture can scale to sustain the business and accommodate changing business needs.

- **Applications Portfolio:** Create or audit and update software inventories to determine what software your teams currently use. This should include all applications. Start with the enterprise management systems such as ERP, HR and payroll, and review all the way down to single function or single department applications, mobile apps, websites and other digital tools that connect users.

  This also should include a review and evaluation of the cost and efficiency of these applications. Creating a comprehensive software inventory will help you identify potential security risks, optimizing communications and opportunities for standardizing, streamlining and realizing cost savings. Standardizing a seemingly small item, such as a calendar application, can enhance communications and foster a better working environment. Consolidating larger systems can significantly reduce costs while improving organizational efficiency.

- **Infrastructure and Operation:** What will the data networks, server stacks, security protocol, help desk and other infrastructure-related aspects of the company look like? Depending on the chosen model, there are often possibilities for cost-saving infrastructure consolidations and streamlining work to operate, maintain and support the infrastructure, operations and users.

  You must consider the skillsets and staffing required to maintain and support these areas, as well as the potential benefits of cross-training. Particularly during the transition phases, you will want to have ample help desk communication and ensure sufficient availability of help desk staff. Ongoing changes and efficiencies will, again, depend on decisions you make about how tightly – or loosely – your merger model is post-merger.

- **Risk Management:** Consider cybersecurity protection, disaster recovery and business continuity planning. In fact, don't just consider it, be sure you take all three of these areas very seriously.

  Your IT assessment will highlight your current security state and where you have gaps. Based on what you know, you must create the blueprint for shoring up the gaps and vulnerabilities and improving the robustness of your disaster recovery and business continuity plans – and planning for regular review and testing of these plans.

  Outside of the known risks, there are always unknown risks you can't foresee or control. Some may relate to bad actors who continue to find new and nefarious ways to sabotage and breach systems. There may be meta changes in the business/financial/ political environment. New competitors can appear on the scene. Vendors can introduce unexpected vulnerabilities.

  It's impossible to know all the potential risks. That means it is essential to cultivate agility and prepare to react quickly in the face of the unknown and unexpected.

- **Operating Cost:** The goal is to run the combined company for less by realizing synergies and eliminating redundancies. This is, of course, an expected and anticipated outcome. If you have carried out all the appropriate due diligence, as described here, this should be a natural outcome.

  You are aware of the redundancies, and you know where the synergies lie. You know where you can leverage the strengths of the two organizations and where you can gain efficiency and reduce costs. Cost savings, organizational efficiencies and uninterrupted operations are some more visible results of planning and executing after a thorough IT due diligence effort.

BUILD A ROADMAP AND EXECUTION PLAN

All the work completed up to this point has laid the foundation for a successful merger. While it may seem like you've been creating the integration plan all along, building a roadmap and execution plan is where you lay everything out in a clear, cohesive and understandable way. It's imperative to understand your company's current state and end-state goals to determine a roadmap for getting there with the resources and budget allocated.

Elements of this phase include:

- **Goals and Alignment:** These are the baseline goals to achieve through the PMI process.
- **Integration Map:** An integration map outlines how to get from point A to point B, along with the structure you need to execute the process logically.
- **Prioritization:** Determine what activities are essential and the order in which you should conduct them.
- **Roadmap:** Create a bird's eye view of the path to post-merger integration, laying out the steps precisely. You should list out timing, responsibilities and expectations for reference as the integration takes place.
- **Investment Budget:** Lay out the overall budget and how the company will use it.

EXECUTE THE ROADMAP

Once all the pieces are in place, you can begin the post-merger integration. Despite the planning, you must closely manage the final phase of PMI to ensure continuity, continue to assess resource and risk management, and ensure the integration stays on track regarding schedule and budget.

Without a comprehensive approach encompassing a high level of detail laid out in a PMI plan and a complete understanding of the elements and how they align, companies expose themselves to unnecessary risk and PMI failure.

Companies that don't effectively plan their PMI IT strategy are less likely to achieve revenue targets, marketing objectives, market share and other higher-level company goals. Partnering with an experienced M&A integration team can help with the execution, change management and cultural integration.

It's important to remember no two post-merger integrations are alike, and IT is a critical element in today's business world. That's why it's crucial to lay out the steps, plan, provide appropriate project oversight and continuity assurance, and continue to monitor risks, budget and timeline. Stay the course, continue to be mindful of the overall company goals and follow the proper steps to help ensure a successful PMI.

CONTINUED EVALUATION AND IMPROVEMENT ARE CRITICAL

Once you complete due diligence, a merger occurs, and you wrap up post-merger integration activities, it's important to remember that while you may now have a combined company, you will still need continuous improvement to ensure success. Even with the most thorough due diligence, unexpected challenges may pop up, and IT leaders should prepare to work through any unforeseen barriers.

Continuous evaluation of systems, processes, uses and validation for these uses continues to remain important as the company moves forward. IT leadership must maintain communication with other leaders outside of technology to understand shifts in needs and downstream impacts, as well as how the company needs to move forward to meet its strategic goals.

It may be beneficial to **bring in a neutral expert** to help evaluate mission-critical needs, navigate strategy and determine how each person can help the company realize its future state. With leadership understanding the importance of continuous improvement will come streamlined interoperability between technology and those who rely on it.

ABOUT THE AUTHOR

Barb Magella is an accomplished executive with over 35 years of IT leadership experience. She has managed all phases of software engineering and development, systems architecture, data architecture and strategy, process re-engineering and support services.

Since retiring in 2018, she spends her time in nonprofit leadership, and in executive and management consulting with Centric's CIO Services.

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ABOUT US

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