Mergers & Acquisitions Onboarding of Assets

Program Management Office

Version 1.0
June 2024

Version History

Version	Date	Type	Author	Organization
1.0	6-24-2024	Process	Laura Heintz	Program Management Office

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1 Introduction

This document outlines the process for onboarding hardware and software assets during mergers and acquisitions (M&A). Efficient management of IT assets during M&A is crucial for ensuring business continuity, minimizing disruptions, and maximizing the value of the acquired entities.

1.1 Purpose

The purpose of this document is to serve as a guideline for onboarding hardware and software assets during M&As. Coordination among all stakeholders is critical to accommodate the distinct requirements and circumstances of each M&A scenario. This ensures a smooth transition and successful integration of IT assets.

1.2 Audience

This document is intended for the Program Management Office (PMO), IT Asset Management (ITAM), IT Administrators (ITADs), Project Managers (PM), and other stakeholders involved in M&A activities within the company.

1.3 Scope

The scope of this document applies to employees and acquired entities' employees who are involved in performing onboarding tasks for hardware and software assets attained during M&A. This includes the identification, assessment, documentation, integration, and ongoing management of these assets as governed by the Program Management Office and defined in the Asset Management Policy.

IT Asset Management governs all IT assets (physical and virtual) operating in the enterprise environment and supporting business activities.

Assets in scope:
- Infrastructure hardware:
    - Servers, including physical and virtual servers
    - Networking equipment such as routers, switches, firewalls, and access points
    - Storage devices, including SANs (Storage Area Networks) and NAS (Network Attached Storage) devices
    - Data center facilities and equipment
- End-user devices:
    - Desktop computers, laptops, tablets, and mobile devices
    - Peripherals such as printers, scanners, and multifunction devices
    - Accessories like monitors, keyboards, and mice
- Software licenses and applications:
    - Operating systems (e.g., Windows, Linux, macOS)
    - Productivity suites (e.g., Microsoft Office, Google Workspace)

- Enterprise applications (e.g., ERP systems, CRM software)
- Development tools and platforms (e.g., GitHub, GitLab, JavaScript)
- Security software (e.g., antivirus, firewall, encryption software)
- Data and databases:
  - Databases and data management systems
  - Data backups and disaster recovery solutions
  - Data warehouses and analytics platforms
- IT services and contracts:
  - Service contracts with vendors and service providers
  - Maintenance agreements for hardware and software
  - Subscription-based services (e.g., cloud services, SaaS solutions)

Assets out of scope:
- Non-IT assets: tangible assets unrelated to IT infrastructure and operations, such as real estate, vehicles, furniture, and office supplies.
- Legacy systems and obsolete technology: outdated hardware and software assets that are no longer in use or supported.
- Personal devices and software licenses owned by individual employees.
- Intellectual property rights, patents, trademarks, copyrights, and other intangible assets.
- Assets owned by third-party vendors or partners.

1.4 Prerequisites

Key prerequisites to facilitate a smooth and successful asset migration include:
- Access to relevant documentation and information about the acquired assets. This includes inventory lists, technical specifications, configurations, licensing agreements, maintenance records, and any other pertinent details. Access to this information is vital for accurately assessing the assets and planning their integration.
- Collaboration with stakeholders from both our company and the acquired entities. Establishing communication channels with all stakeholders facilitates the exchange of information, the alignment of objectives and streamlines the decision-making processes.
- Clear understanding of IT infrastructure and systems of both entities. This includes network architecture, hardware configurations, software applications, data storage systems, security protocols, and any interconnected dependencies. Understanding the existing IT landscape is essential for identifying integration requirements and any potential challenges.

2 Roles and responsibilities

The following table describes the roles and responsibilities applicable to the processes and activities referenced in this document.

Table 1. Roles & Responsibilities

Role	Responsibility
Program Management Office	- Facilitates the exchange of information about assets - Ensures alignment of objectives with stakeholders of the acquired entity to facilitate the onboarding of hardware and software assets and to execute a seamless transition - Manages the decision-making processes
IT Asset Management	- Oversees the onboarding process - Coordinates with various teams (IT, Operations, Finance, Legal, etc.) to ensure timely completion of onboarding tasks - Ensures compliance with company policies - Provides ongoing management of acquired assets
M&A Project Team	- Conducts asset identification and assessment - Documents asset details
IT Administrator	- Integrates acquired hardware/software with our systems - Provisions assets
Stakeholders	- Provides information and documentation about the acquired assets - Participates in the decision-making processes

3 Process

The onboarding of assets to our company during M&A is a process that encompasses a structured approach, beginning with the identification of assets from the acquired entity, followed by a comprehensive assessment to measure their compatibility with and value to our company. The thorough documentation of these assets, including their specifications and dependencies, serves as a foundation for the integration efforts and involves the strategic alignment of systems, processes, and teams to facilitate a unified transition. Ongoing management post-integration ensures the optimization of these assets.

3.1 Preparation and planning

During the preparation phase of merging or acquiring IT assets, a cross-functional M&A Project Team comprised of members from various departments such as IT, operations, finance, and legal collaborate to navigate the integration process effectively. Key stakeholders are identified from both our company and the acquired entity to align objectives throughout the transition.

Accessing and reviewing documentation and information pertinent to the acquired assets enables the M&A team to gain insight into the scope, condition, and strategic value of the acquired assets and helps in planning for a seamless integration.

3.2   Asset identification and documentation

During asset identification, an inventory of hardware and software assets is conducted. This audit captures all in scope assets including routers, servers, networking equipment, software licenses and applications.

Each asset undergoes thorough assessment to evaluate its condition, functionality, compatibility, and interoperability within our company infrastructure. Simultaneously, efforts are directed towards identifying redundant or obsolete assets that warrant decommissioning to streamline operations and optimize resource utilization. Licensing and compliance issues associated with the acquired assets are assessed to ensure adherence to regulatory frameworks and mitigate potential legal risks.

An ITAM intake spreadsheet is utilized to document detailed information about each asset, including specifications, configurations, serial numbers, and licensing details.

1. For all hardware that will be transferred to our company:

    a) An ITAM intake spreadsheet must be provided to the IT Asset Management team from the M&A Project Team which includes all devices that will be transferring to our company to ensure asset ownership/responsibility.
    Required asset information includes:
    Make, model, serial number, responsible administrator for each asset (and other details) prior to provisioning on our network.

    b) Capital asset information and depreciation (if applicable) and in-place maintenance agreements will be upload via the intake spreadsheet to the Asset Management System (AMS) and registered in the Configuration Management Database (CMDB) as a Configuration Item (CI) and associated with the AMS record.

    c) A hardware attestation notice will be sent to the administrator of record.

2. For all software that will be integrated into our company:

    d) Software application information must be provided to the IT Asset Management team from the M&A Project Team via an ITAM intake spreadsheet.
    Required information includes:
    Vendor, software name, number of licenses, identified users (individuals/enterprise), existing purchase order number and contract details.

    e) The asset will be registered in the Configuration Management Database (CMDB) as a Configuration Item (CI).

    f) For any application where a valid license agreement or number of deployed licenses are not aligned, discrepancies must be resolved before the software can be deployed on our company network.

3.3   Integration of acquired assets

Once the assets have been identified and added to AMS/CMDB, a comprehensive plan to integrate the acquired assets into the company environment is developed. This strategic roadmap delineates the step-by-step process for merging systems and technologies while minimizing disruptions to business operations. This process includes configuring network settings, enforcing security protocols, and maintaining access controls to align with the company's overarching IT architecture and security framework. This ensures a cohesive and standardized environment that upholds data integrity and safeguards against potential vulnerabilities.

Concurrently, migrating data and applications from acquired systems to our company platforms will involve a systematic transfer, leveraging best practices to mitigate risks and maintain operational continuity throughout the transition.

4 References

- Asset Management Policy
- Risk Management Policy
- Lifecycle Management Policy
- Regulatory Compliance Policy
- Asset Maintenance Procedures

5 Definitions

The following table provides terms, common abbreviations, and definitions referenced in this document.

Table 2. Terms & Definitions

Term	Definition
AMS	Asset Management System
CI	Configuration Item
CMDB	Configuration Management Database
ITAD	IT Administrator
ITAM	IT Asset Management
M&A	Mergers and Acquisitions
PM	Project Manager
PMO	Program Management Office