

Mergers, Acquisitions & Divestitures

A phased approach to successful M&A migrations

The decision to merge, acquire, or divest a company or division typically adds work for those managing the transition. Departments like Finance, HR, and IT end up taking on new tasks and juggling them with already full workloads. For IT it's often beneficial to work with outside consultants or MSPs who have expertise in merging or spinning off employees. Outside consultants can help organize user identities and data, prepare the company for the transition, and execute the migration.

This guide provides an overview of the four phases BitTitan recommends for migrating collaboration platforms and applications as the result of mergers, acquisitions, and divestitures (M&A): Assess, Collaborate, Migrate, and Remediate. While the actual migration won't happen until the ink is dry on the deal, planning should begin well in advance – as soon as discussions look serious.

Phase 1: Assess

Even when senior leadership is determined to keep news of a merger or acquisition close to the vest, it's important for key members of the IT and management teams to begin assessing and scoping the migration project. This begins with a thorough assessment to understand the platforms, applications, and workloads within each organization. Equally important is clarifying the desired strategy: Will the companies be merged under one brand, or are they just being combined for operational efficiencies? To what extent will employees need to collaborate in a shared environment?

The answers to these questions will shape your migration strategy. Here are some typical scenarios. MigrationWiz handles them all:

- The smaller organization is migrated into the larger organization's tenant.
- Both organizations migrate into a new tenant.
- Each organization remains on their tenant and collaboration is established between the two.

Taking a people-first approach to M&A migrations

Create a communication plan to ensure all users are well informed on the collaboration and migration plans and the timeline of those plans.

Appoint a delegate from every department to help their users and raise possible concerns to the migration team.

Set up a designated support area, ticket system, or email for users to get their questions answered.

Provide training for users and IT staff on any new technology that will be implemented during the migration.

Phase 2: Collaborate

If both organizations are using Microsoft 365, you can use that to your advantage by setting up collaboration channels in advance using tenant federation. If an organization is using Google, you can do this with workforce identity federation. These connections allow users to communicate, collaborate, and share resources. This can also help you identify any unique concerns or timing issues that should be considered as the project moves forward. Early collaboration can also reassure people who might feel unsettled by the merger or acquisition news.

Get help with planning and scoping

If internal IT staff will be handling the movement of users and data, BitTitan migration experts can help answer technical questions and provide advice to head off any issues before they arise. The MigrationWiz Technical Support and Sales team doesn't provide professional services, but they do offer expertise and resources to help you navigate first-time or complex migrations. The optimum time to use this resource is in the planning and scoping phase of your project. MigrationWiz has streamlined migrations for millions of users for more than a decade. You can leverage our extensive experience to assure a successful migration from start to finish.

BitTitan onboarding services

- Overall guidance for your migration strategy
- Recommended user communication
- Technical advice for your IT environment
- Recommended resources for end users
- Guidance for project timelines

Phase 3: Migrate

By performing discovery and scoping during the Assess and Collaborate phases, you'll have a plan in place when leadership at both organizations is ready to launch. At this point it's much like any other migration: Your focus will be on moving workloads and permissions from one tenant to another. And it's time to put MigrationWiz to work. The **MigrationWiz Tenant-to-Tenant Migration Bundle (TMB)** is the recommended license for most M&A migrations. It supports mailboxes, documents, personal archives with no data limit, and collaboration workloads.

Phase 4: Remediate

Every migration project includes a post-migration phase for cleanup and security. This is the time to correct any external identities so they can be internal to the tenant. Securing the environment means setting the proper permissions, security settings, and multifactor authentication (MFA) to align with the organization's governance.

BitTitan works with organizations of every size to help them migrate to the cloud or between tenants. Mergers, acquisitions, and divestitures are complex, high-stakes projects. MigrationWiz isn't just a migration tool. It's backed by the support and information you need to make every project a success.

