

Business Architecture in Action: Mergers & Acquisitions At-A-Glance



Common Challenges

Assessment and Pre-Deal

Organizational fit and synergies are not always comprehensively known up front

Potential impact to both organizations is not always comprehensively known up front

Deal and Integration (Post-Deal)

People throughout both organizations do not have a clear, comprehensive or actionable picture of:

- What changes are needed to the business and IT environments
- How they will be achieved (e.g. packaging, sequencing, etc.)
- How to reprioritize the in-flight and planned projects

Business / enterprise architecture is typically not at the table to assist with M&A, leading to the challenges above



Opportunities

Assessment and Pre-Deal

Assess alignment of purpose, direction and structure between both organizations at a high level including goals, strategies and business models

- Identify all stakeholders to involve
- Ensure both business and IT perspectives are always considered
- Greatly accelerate and ensure completeness of impact analysis

Deal and Integration (Post-Deal)

Create comprehensive target architectures and strategic roadmaps for integration activities, inclusive of all business and IT changes, providing a common vision and the most efficient path for implementation

Leverage business / enterprise architecture throughout the M&A life cycle and integrate practices across both organizations (if they exist)

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How We Do It

Assessment and Pre-Deal

1. Create or Leverage the Minimum Business Architecture Baseline Content for Both Organizations
2. Capture Additional Content Needed for Analysis for Both Organizations (e.g. business units, information, system applications, processes, strategies / objectives, initiatives, customer journeys and business model canvases all mapped to the business architecture baseline)
3. Assess Alignment of the Organizations' Strategies / Objectives and Business Models
4. Assess Potential Impacts to the Organizations' Customer Experiences and Business and IT Architectures
5. Summarize / Visualize the Results and Share Insights

Deal and Integration (Post-Deal)

1. Capture Additional Content Needed for Analysis for Both Organizations (i.e. further detail that was not needed or available during pre-deal)
2. Analyze the Business and IT Environments for Both Organizations and Identify Changes Needed
3. Reflect Changes for Both Organizations in Target Customer Experience Designs and Target Business and IT Architectures
4. Develop Strategic Roadmap to Implement Changes (per target architecture)
5. Reprioritize Project Portfolios
6. Execute and Oversee Changes

Considerations



- A minimum set of business architecture baseline content for *both* organizations is needed for both pre-deal and post-deal analyses, but can be created within a relatively reasonable time frame, even for new practices. This includes capabilities and value streams created at the enterprise level.
 - Note: Existing business architecture content for either organization can be used to accelerate completion for the other
- While capturing a full set of additional content is ideal (e.g. business units, information, system applications, etc.), it can be created on a just in time basis if needed. Significant value can be contributed even if only the business architecture baseline exists.
- Architecture may accelerate and improve the M&A process, but it is dependent on business engagement and decision-making
- It may take some time and change management for architects to earn a seat at the table during M&A activities
- A similar approach may be used for *internal* changes such as merging business units

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