# Financial Services M&As

CDW understands how complex the merger and acquisition (M&A) process can be, especially for an organization in the financial services industry. Technology compatibility, IT infrastructure longevity and overall IT security are all crucial to a successful end result. Below you’ll find the important milestones of each phase of the M&A journey, how CDW can support your financial services organization, and helpful resources that you can download for more information.

## PHASE 1: PRE-ANNOUNCEMENT

**ACTIONS AND ANALYSIS**
- Acquisition target identified
- Execute proper agreements
- Plan IT due diligence process

**TYPICAL PARTIES INVOLVED**
- IT
- Management
- Risk and Compliance
- Operations

**KEY MILESTONES AND CONSIDERATIONS**
- Determine Timeline
- Complete System Security IT Assessment
- Determine Overall IT Merger Goal
- Determine Differences in IT Management
- Determine Key IT Differences Between Organizations
- Inventory Data-Related Systems
- Determine Acquired Company Asset Lifecycle
- Inventory Communication Networks/Systems
- Review Existing Application Mapping, Dependencies & Prioritization

## PHASE 2: ANNOUNCEMENT

**ACTIONS AND ANALYSIS**
- Roadmap and plan, design and architecture
- Evaluate and select core and ancillary applications
- Identify infrastructure, operating systems and cloud considerations

**TYPICAL PARTIES INVOLVED**
- IT
- Management
- Operations
- HR

**KEY MILESTONES AND CONSIDERATIONS**
- Plan Deployment/Management of New Data-Related Systems
- Asset Lifecycle Planning
- Plan Deployment/Management of New Comms Networks/Systems
- Plan Application Mapping, Dependencies & Prioritization
- Data Lifecycle Planning
- Plan for Access, Authorization and Authentication Control
- Plan Future BCP/DR
- Plan Policy Changes
- Review Existing/Approved IT Strategies, Initiatives & Roadmaps
- Plan Management of Licenses, Contracts & SLAs

## PHASE 3: DAY 1+ BEYOND

**ACTIONS AND ANALYSIS**
- Integration
- Operation
- Support

**TYPICAL PARTIES INVOLVED**
- IT
- Management
- Operations
- HR

**KEY MILESTONES AND CONSIDERATIONS**
- Core and Ancillary Application Conversions/Installations
- Implementation of New Data–Related Systems
- Implement Asset Lifecycle Management
- Procure, Deploy, Manage New Comms Networks/Systems
- Implement Data Lifecycle Management
- Access, Authorization and Authentication Control Implementation
- Ensure BCP/DR Plans In Place
- Ensure Existing/Approved IT Strategies, Initiatives, Roadmaps on Track
- Implement Management of Licenses, Contracts & SLAs
- Ensure HW/SW Licensing Up to Date
- Implement IT Admin and Help Desk Management

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54% of banks surveyed say their institution is likely to purchase another bank.


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### Reference Guide

**Financial Services M&As**

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#### Key Milestones and Considerations

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<td>- Determine Acquired Company’s Data Lifecycle</td>
<td>- Plan IT Admin &amp; Help Desk Management</td>
<td>- Ensure Application/Software Licensing/Warranties/Leases/Changes Complete</td>
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<td>- DR/BC Analysis &amp; Early Planning</td>
<td>- Review Application/Software Licensing Changes</td>
<td>- Implement Vendor Contracts/Agreements/Commitments</td>
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<td>- Review Acquired Company’s Policy Enforcement</td>
<td>- Document New IT Service Process</td>
<td>- Implement IT Staff Changes &amp; Training</td>
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<td>- Review Existing IT Strategies/Roadmaps</td>
<td>- Create Detailed Failover Plan</td>
<td>- Implement Managed Services (MSSP, Hosted Network, etc.)</td>
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<td>- Thorough Document Review</td>
<td>- Plan IT Staff Changes/Training</td>
<td>- Implement Website Changes</td>
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<td>- Review Help Desk Capabilities</td>
<td>- Plan Managed Services</td>
<td>- Implement Security Changes</td>
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<td>- Review In-Process IT/Business Initiatives</td>
<td>- Review Vendor Contracts, Agreements, Commitments</td>
<td>- Active Directory Integration</td>
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<td>- Telecom Audit</td>
<td>- Plan Mobility Management</td>
<td>- Application Integration</td>
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<td></td>
<td>- Revise the IT Roadmap</td>
<td>- Implement Mobility Management</td>
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<td>- Plan Security Consolidation</td>
<td>- Review Vendor Contracts, Agreements, Commitments</td>
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### How We Can Help

CDW is here to support your financial services organization through every phase of the M&A journey. Our services and value-added offerings help ensure a secure, streamlined and timely IT implementation for your organization.

#### Project Management and Consulting

Our Consultative Advisory Services provide counsel and project management on IT direction, process improvement, governance and cloud technology, IT operations and business continuity.

#### Software Asset Management

We can execute a Total Software Management solution that covers contract management and all your unique software needs.

#### Security Assessment

CDW’s Information Security solutions can perform risk assessments, policy and procedure compliance reviews, and application assessments.

#### Solutions

We design, implement and manage customized services and solutions for organizations big and small, focusing on the nuances of IT so you can focus on your M&A.

#### Managed Services

We can help you manage your most complex infrastructure and applications with holistic, secure solutions that meet your needs and budget.

### Additional Resources – Click to Download

- CAS
- CDW Managed Services
- CDW Solutions
- Data Center
- Digital
- M&A
- Microsoft Azure
- Security
- Software Management
- Tech Solutions Library