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# Simplifying the post-merger IT integration process

(By developing a post-merger IT integration method)



**Universiteit Utrecht**

In cooperation with



Thesis document

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Name : Rohied Fagoe  
Student number : 3280152  
Contact : [r.a.fagoe@students.uu.nl](mailto:r.a.fagoe@students.uu.nl)

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Utrecht University  
Master Business Informatics  
Institute of Information and Computing Science



## Preface

Within this thesis document, the results of the thesis project toward the development of a roadmap for the post-merger IT integration process are described. This study was conducted as part of the finalization of the master business informatics at the University of Utrecht.

Next to an extensive project description, this thesis document contains all steps, which were taken to develop the post-merger IT integration method.

Because of the sensitive information within this document this document may only be issued to persons directly connected to the thesis project. Others may receive approval after granted by Rentokil Initial B.V. or the Utrecht University.

### Information

Name	:	Rohied Fagoë
Student number	:	3280152
E-mail address	:	<a href="mailto:r.a.fagoë@students.uu.nl">r.a.fagoë@students.uu.nl</a> ; <a href="mailto:rohied2003@hotmail.com">rohied2003@hotmail.com</a>
Telephone number	:	06-42061248
Master program	:	Master Business Informatics
Starting year	:	2007
Title of thesis project:		Simplifying the post-merger IT integration process
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External supervisor	:	J. Aaftink
Thesis committee	:	dr. S. Jansen and dr. R.S. Batenburg
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## 1 INTRODUCTION

Batelaan and van Essen, (2000) describe that: “IT integration during a merger, often proves unsuccessful”. They also state that the low success is mainly caused by: “the overestimation of the expected synergies and the underestimation of the post-merger integration processes”. The post-merger integration processes, which are related to the integration of IT between organizations, with their own IT processes, IT systems, IT infrastructures and IT personnel, involve multiple strategies and pathways. The strategies available often have an abstract nature. These should be translated into tactical considerations (such as concrete plans e.g. a roadmap), so the management team can get an overview of the necessary steps to take, during the post-merger IT integration process.

After performing a literature research it became clear that there is very little literature available, which directly defines the post-merger IT integration process, this is also described by Mehta and Hirschheim, (2004). To define the post-merger IT integration process Roehl et. al., (2008) described that: “an integration roadmap is needed to provide an executable plan for the overall integration and that the final roadmap should outline how to proceed through the IT integration process”. They also state the following: “an effective IT integration roadmap is a critical enabler of an effective merger integration”.

### 1.1 Problem definition

Theory described the need for an IT integration roadmap. In practice we can see that companies really are struggling with the IT integration process. This is stated by Batelaan and van Essen, (2000). They describe that:

**“IT integration during a merger, often proves unsuccessful”**

They also describe that the low success is mainly caused by: “the overestimation of the expected synergies and the underestimation of the post-merger integration process”. To define the post-merger IT integration process Roehl et. al., (2008) described that:

**“An integration roadmap is needed to provide an executable plan for the overall integration and that the final roadmap should outline how to proceed through the IT integration process”.**

One of these companies that is struggling with the IT integration process after a merger is Rentokil Initial, which will be described in the following section. The proposed project was thereby addressed by Rentokil Initial.

“Rentokil Initial plc. is one of the largest business services companies in the world they operate in the major economies of Europe, North America, Asia Pacific and Africa” (Rentokil Initial, 2010). Their headquarter is located in the United Kingdom (UK).

Rentokil Initial plc. has over 78,000 employees divided over more than 50 countries. Within these countries “the ‘Rentokil’ and ‘Initial’ brands have come to represent expertise and consistent quality of service” (Rentokil Initial, 2010). The delivered services are: pest control, package delivery, interior landscaping, catering, cleaning, washroom solutions and textiles.

In 1997 Rentokil Initial merged with Hokatex linnenverhuur. Hokatex linnenverhuur then became Initial Hokatex. The problem is that they merged but they did not integrate their IT departments. Now years later Rentokil Initial and Initial Hokatex both have their individual IT services and processes. Both divisions constantly need to report to their headquarter (Governance) in the UK.

But since these divisions have their own IT processes (such as Information Technology Infrastructure Library (ITIL) processes), IT systems, IT infrastructure and IT personnel. Next to the inefficient way of reporting to the UK, this causes a lot of IT redundancy and is not improving their overall productivity.

Mainly for these reasons Rentokil Initial wants to integrate the IT departments, the only problem is that they do not know where to start and what the steps are to effectively move through the IT integration process.

## 1.2 Scientific relevance

According to Berkman, (2001) research on the recentralization trend started in the late 1990's. He described that: “companies are centralizing because it is more cost-effective than having a decentralized environment”. More advantages of centralization are stated by Mehta and Hirschheim, (2004) they state that: “centralization affords greater efficiencies (economies of scale), standardization and integration”. Yet the research on the recentralization and integration trend, which started in the late 1990's did not help merging companies with their IT integration.

Batelaan and van Essen, (2000) confirm this by stating that: “IT integration often proves unsuccessful during a merger” and that the cause of this low success mainly lies in the lack of understanding towards the concrete steps contained within the post-merger integration process.

To decrease the underestimation and increase the awareness of the different steps that the post-merger IT integration process contains and since Mehta and Hirschheim, (2004) describe that: “there is very little literature available, which directly defines the post-merger IT integration process”, a roadmap should be developed.

### 1.3 Social relevance

As stated earlier Batelaan and Van Essen, (2000) described that: “IT integration often proves unsuccessful during a merger” and that the cause of this low success mainly lies in the lack of understanding towards the concrete steps contained within the post-merger integration process.

To solve this problem Roehl et. al., (2008) described that: “an effective IT integration roadmap is a critical enabler of an effective merger integration and should be viewed by the IT organization as a reusable tool to be improved with every transaction”.

Thus an IT integration roadmap can be seen as a critical initiative for the overall integration effectiveness. For this reason Roehl et. al., (2008) states that: “the development of a roadmap is an effective way for organizations to determine what dependencies exist and to evaluate how to most effectively move the integration forward and maintain momentum”.

Literature describes that when the IT of a company is integrated, it will enable the newly formed IT department to increase its efficiency. Nowadays IT plays a big role in the overall efficiency of a company this also accounts for Rentokil and Hokatex, for this reason it is necessary for the IT to perform efficient. If the overall efficiency of Rentokil and Hokatex would decrease it could have a negative effect on the employees. For example this can cause employees to work inefficient, consequential the possibility of losing their jobs will increase. Rentokil and Hokatex perform as employers of a large number people. For these employees to keep working efficient, the company as a whole has to be able to work efficient and since the IT supports the business to work efficient, this project assists Rentokil and Hokatex to keep working efficient and to increase their overall efficiency.

After completion of this research project other organizations, willing to integrate their IT with that of their merging partner or are willing to integrate their internal IT divisions will have an action plan in the form of a roadmap for the overall IT integration. The roadmap can outline precisely, how to proceed through the integration process.

### 1.4 Research objective and questions

Because the need for an IT integration roadmap, exist both in literature and practice, the objective of this research project aims at the development of a generic IT integration roadmap for the post-merger IT integration process between organizations. The roadmap will be developed with the help of the method engineering technique “method engineering” designed by Weerd and Brinkkemper (2006), which will be described later.

Thus the completion of this research project will result in a structured reference method, which will describe steps, intended to provide an executable plan for the overall IT integration.

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The roadmap should outline precisely how to move forward through the IT integration project. This brings me to my research question:

*“How can a reference method for the successful integration of IT within the post-merger process between organizations be developed and validated?”*

To answer the main research question, the following sub questions are constructed:

*RQ1 “What are the available and frequently used strategies, for the successful integration of IT within the post-merger process?”*

*RQ2 “Which critical success factors can be extracted from the existing IT integration strategies?”*

*RQ3 “Which factors influence IT integration success?”*

*RQ4 “What should an IT integration reference method contain?”*

*RQ5 “How can such a method be validated in practice?”*

## 1.5 Research approach

In this section we will describe, which methods we used to perform the research project and to assure positive results.

### 1.5.1 Design research

Within this research a complete new method is not developed, yet the research can be seen as a design research because the proposed method is developed by combining existing method and strategy fragments with some new elements from different domains (e.g. change management). This research is approached using the design research approach suggested by Hevner et. al., (2004) mainly because of its main view to evaluate knowledge, which supports solving identifiable organizational problems, by constructing an artifact.

In this research the main artifact is the IT integration roadmap. The steps followed to develop the main artifact, with the help of design research are (Hevner et.al., 2004):

- Problem awareness;
- Suggestion and development;
- Evaluation;
- Conclusion.

Problem awareness is the first step and was raised in literature and by Rentokil Initial. Literature study and the case study performed at Rentokil Initial described the need for an IT integration roadmap, to provide an executable plan for the overall IT integration.

The second step is the suggestion and development step. The suggestion part of this step, is to gain more insight into the problem by studying earlier research on related topics. The development part of this step is meant for the development of the main artifact. After this step the main artifact has been evaluated by 7 interviewees. At last the conclusions are drawn and suggestions for further research are discussed.

### 1.5.2 Research model

Figure 1.1 shows the research model that is used during this research. The model is developed using the method designed by Verschuren and Doorewaard (2007). They describe that the research model gives a schematic view of the purpose of the research and the global steps, which must be taken to achieve this goal. Once a research model has been developed it will help all involved parties to see at a glance how the research is build up and the expect results. In turn this will reduce the risk of misunderstandings.

The model should be read from left to right, since the squares on the left are related to the start of the project and the squares on the right with the objective of the project. The squares relate to the subjects of the project, these are all individually labeled. The squares are connected with the help of arrows. The vertical lines within the model show, which information is combined and the horizontal lines show what can be concluded from the combined information.

The model is also separated in 4 parts, namely A,B,C and D divided by dotted lines. These are described by Verschuren and Doorewaard (2007), as followed. The first part "A" formulates from, which research perspective the research will be approached .The second part "B" indicates to what research object the research perspective is applied. The third part "C" indicates how the analysis of the research object will be performed. Finally part "D" depicts the purpose of the research project.

Within this research the different domains found in the literature study described earlier, are used to find the factors influencing the post-merger IT integration process. Literature on method engineering is also studied, to gain knowledge on reference methods. The information that gathered during the exhaustive literature research on critical success during the post-merger IT integration phase, is used to develop the roadmap with the essential processes. After that the method will be validated by means of expert interviews and with the help of a case study at Rentokil Initial. The method will be validated at Rentokil Initial by executing the steps within the reference method in practice. This will result in an expert validated IT integration reference method. Since the method will be constructed with the help of validated method fragments, the developed roadmap will already contain a high validation level. The steps taken within the research model will be elaborated in the following chapters.

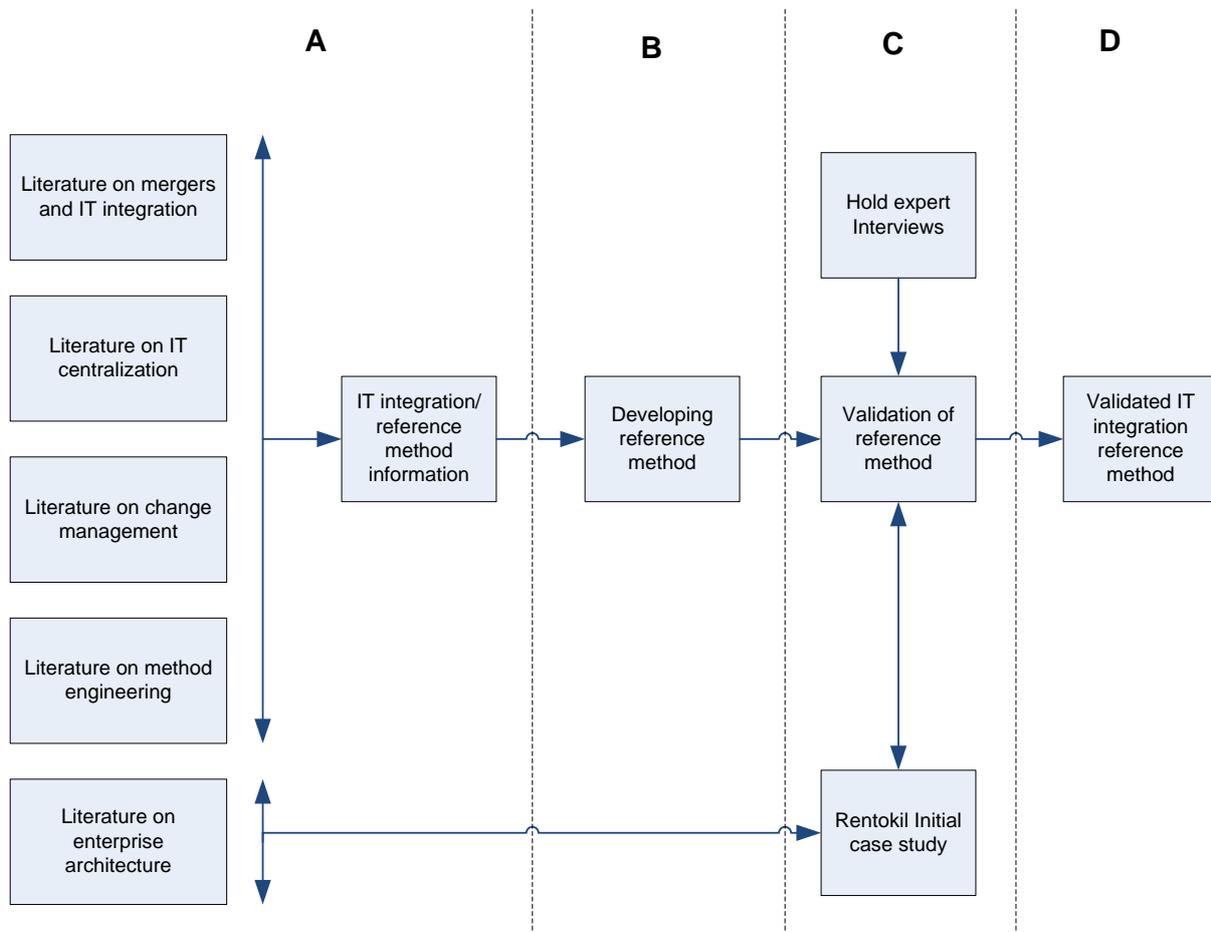


Figure 1.1: Research model

### 1.5.3 Literature study

To successfully complete the project and to provide the reader with essential understanding of the subjects within this project, scientific literature will be gathered. By doing this we will present factors, which influence the IT integration process and broad knowledge will be gained and analyzed. Also the available IT integration strategies will be categorized for every step found within the post-merger integration process. A thorough literature research is required to refine the factors, which affect the post-merger IT integration process. The information for this study is gathered from journals, reports, thesis' and conference papers.

The literature study will be done to find answers to the research questions and to increase the related knowledge on the topic. The source of the literature will be properly referred to in this research and will be listed in the list of references.

The literature study will reach its end when the researcher is at the point of saturation. This means that the researchers will stop their data collection when there is no new information to gain on the selected cases or the issues relevant to them (Hart et. al. 2007). When they have come to the point that they have found enough examples of the manifestations on the subject they are studying, they may complete their analysis of the examples.

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With the information gathered from the literature study performed during this research the researcher created an overview of the critical success factors (CSF) and best practices affecting the Post-merger IT integration process. The overview can be found in table 4.1. Within the overview the CSF's are categorized per IT integration phase. This table was formed by means of saturation of the literature studied.

#### 1.5.4 Qualitative research

As Mehta and Hirschheim, (2004) describe there is very little literature available, which directly defines the post-merger IT integration process exploring and having a good understanding about the subject becomes crucial. With this in mind a qualitative research will be the best approach to gain knowledge on how the post-merger IT integration process works, what the most common problems are during a post-merger IT integration and from what perspective other researchers and companies approach the problem to find a possible solution.

Within qualitative research we will use the interpretative variant described by Hart et. al., (2007). We use this variant because this variant addresses the questions “how” and “what” and has a diagnostic and exploratory nature. Qualitative research is also applicable because the post-merger IT integration method needs validation. Within this research we will make use of interviews and an exhaustive case study to validate the developed post-merger IT integration method. Opposed to quantitative research, which focuses on quantity and frequency. Since the research question has a qualitative approach and not a holistic and or quantitative one, the qualitative research will be used.

When concerning interviews, qualitative research mainly focuses on taking open interviews, in which the researcher seeks to gain insight from the perspective of those involved (Hart et. al., 2007). They also describe that the more measurements one makes, the better the results provide insight into the reliability. If the measurements show the same results, it can be concluded that the results are reliable. For this reason we will also validate the developed method by means of a case study at Rentokil Initial.

##### 1.5.4.1 Interviews

With the help of the literature research the post-merger IT integration roadmap was formed. To make sure the developed method could be used in practice, it was assessed using qualitative research. Interviews were held to gain knowledge on the focus areas, as well as to validate the usability of the post-merger IT integration roadmap. The technique that was used during the interviews, is called semi-structured interviewing. According to Hart et. al., (2007) this type of interviewing technique allows the interviewer to receive answers on pre-defined questions and anticipating on new insights and discussing them with the interviewees.

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Because we used semi-structured interviews in this research as a validation technique, there will be a couple of possible pitfalls and topics, which will have to be taken into account. To avoid these pitfalls from happening a structured preparation was performed before the interviews were held. These preparations are described in more detail in the next section. They include a selection procedure for the interviewees, an interview protocol and a data analysis strategy.

#### 1.5.4.2 Selection procedure

The main idea is to make a selection of experts to have an interview with. What should be taken into account, is the knowledge and experience the interviewee has. Three important aspects the expert interviewee must have are summarized below:

- The interviewee must work or should be active within a company, which addresses merger and acquisition projects;
- The interviewee must have experience in IT integration issues concerning mergers and acquisition projects;
- The interviewee must have had experience with issues surrounding the decision making and in using methodologies to find a solution to the IT integration situation.

On basis of the above consultants at ICT service providers most likely to be the best choice within this research. This because people who daily have to deal with similar issues have a broader experience in this field. They have seen the same symptoms and questions occur more than once. Concluding organizations that have been involved several times in a merger or acquisition project form a perfect target group for this research project.

There were seven experts selected for the interviews, To ensure the reliability the interviews the interviews were taken with experts who were directly involved in the decision making related to IT integration during a merger and acquisition. The experts were are skilled and experienced in the field of IT integration during a merger or acquisition. To ensure differences in experiences and views on post-merger IT integration, the experts where all from different companies and their roles differed from IT consultant to IT managers and IT project managers. Since all of the experts where well known with IT integration methods, the 7 experts were selected to validate the identified critical success factors and the placing of these factors in the IT integration roadmap. Appendix 3 shows the names, functions and the answers given by the experts interviewed.

#### 1.5.4.3 Interview protocol

The experts for the interviews were contacted by an e-mail, which contained a short introduction to the subject of the research project, the objective of the interview, and to ask if they were willing to cooperate in this research. After that the experts were e-mailed or called to make an appointment to schedule the interview.

After the experts approved to be interviewed and join the research project, an interview was scheduled for a maximum of one hour. During the interview the researcher asked the questions to the experts, the researcher also wrote down all of the answers that were given by the experts. After the end of each interview with an experts, the results were processed immediately into a document. A copy of the answers given by the expert during the interview were sent to the expert so that he could verify if the findings corresponded with what was discussed during the interview. The interviews were all lead by the researcher of the project, during the interviews he had no self interest in the answers given and had an objective point of view.

#### 1.5.4.4 Data analysis

Data analysis generally starts by carefully taking the information gathered by the interviews and reading it, rereading it and thinking about what is learned about the topic (Hart et. al., 2007). Since the gathered information must be analyzed and converted to results and conclusions, it has to be taken into account that there must be room to maintain the meanings and interpretations expressed in words. To support this, the analysis was conducted with the help of the data analysis framework of Miles and Huberman (1994).

Within the data analysis process, the three major phases of the framework were used to serve as a basis. The three phases in the framework developed by Miles and Huberman (1994), are: data reduction, data display, and conclusion drawing and verification. These three phases will be elaborated in the next section.

Data reduction is the first phase of the framework of Miles and Huberman (1994). This phase is concerned with “the process of selecting, focusing, simplifying, abstracting, and transforming the data that appear in written up field notes or transcriptions”. Within this research the field notes or transcriptions are formed by means of expert interviews. In total seven expert interviews were held. Through the interviews a large amount of data has been collected, which needs to be reduced to extract the relevant information, which is relevant for the validation of this research. They state that it is important to reduce the data into categories.

Coding is a large part of this phase, by doing this the researcher can gain insight into the collected data and the level of validation within the answers, related to the main research question (Boeije, 2005). The large amount of data should be made useful for analysis this can be achieved by using codes. The only way a sentence or phrase is meaningful is when it can validate the developed post-merger IT integration method. The process of reducing data was repeated till all of the data was properly reduced. The complete summary of the Interview data can be found in Appendix 3 - Interview summary.

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To categorize and code the useful data the following steps were used developed by Boeije (2005). The steps are as follows:

- 1) Print the first interviews with a wide left margin;
- 2) Read the text line by line and determine in each case the beginning and end of a clip;
- 3) Determine why a fragment relates to another piece of text and determine whether the text is of meaning for the project;
- 4) Determine whether the fragment at this time appears to be relevant to the research project.
- 5) Give the piece a corresponding name (coding).
- 6) Put this code in the margin.
- 7) Read the text in its entirety, so naming all the relevant pieces of text.
- 8) Compare pieces from the text, since it is likely that more fragments from other sentences describe the same subject and should get the same code.

After the implementation of the steps, the codes obtained from the categorization were entered in a computer.

Data display is the second phase of the data analysis process. As defined by Miles and Huberman, (2004) data display is an organized, compressed assembly of information that permits conclusion drawing and action. What this phase entails, is that it is easier to gain insights on the subject by retrieving the categorized data, rather than to review all of the raw data again. Within data display there are many ways to display the data, these include diagrams, graphs, tables, and networks. The used display types in this research are tables and matrixes. The tables are used to show what the answers were to the interview questions at hand and how these answers relate to the overall validation of the method. The matrixes are used to display the coded fragments within their categorization. In chapter 6, the tables and matrices used for the data display are depicted and elaborated.

The third and last phase is the conclusion drawing and verification phase. Hart et. al., (2007) describe the conclusion drawing phase as a means of stepping back to consider what the analyzed data means and to assess implications for the question at hand. The conclusion for this research will be drawn, based on the expert views on the developed post-merger IT integration method.

Furthermore, conclusions will be drawn on the phases and sub phases of the post-merger IT integration method. The conclusions needed to be checked whether the validated literature and the development of the method corresponded with the findings in practice.

Verification is described by Hart et. al., (2007) as seeking conformation of statements. These steps are performed in accordance with the 4 subjects that realize a trustworthy conclusion from a qualitative research, these are: credibility, transferability, dependability and conformability. As described by Lincoln and Guba, (1985) credibility can be referred to as the internal validity of a research, transferability as the external validity of a research, dependability as the reliability of a research and conformability as the objectivity in qualitative research.

#### 1.5.4.5 Case study analysis

During this study a case study was performed at Rentokil Initial, to validate the developed post-merger IT integration method. The reason for the validation at this company is that the proposed project was addressed by Rentokil Initial. For over 12 years Rentokil Initial merged with Hokatex linnenverhuur. Hokatex linnenverhuur then became Initial Hokatex. The problem is that they merged but they did not integrate their IT departments. Now years later Rentokil Initial and Initial Hokatex both have their individual IT processes (such as Information Technology Infrastructure Library (ITIL) processes), IT systems, IT infrastructure and IT personnel. This causes a lot of IT redundancy and is not improving their overall productivity.

Mainly for these reasons Rentokil Initial wants to integrate the IT departments, the only problem is that they do not know where to start and what the steps are to effectively move through the IT integration process.

As Hart et. al., (2007) describe practical scientific research should be tested for suitability in practice. The steps within the developed method were validated by executing them in practice. Per phase of the method the processes were executed so that the deliverable of the related process could be provided. All of the findings related to this process were documented and summarized in chapter 6.

Only the standardization route of the post-merger IT integration method was validated. One single case study can never be enough to have an overall validation of the method. The case study performed only validated the first 3 phases of the method. For future research we would suggest to validate the whole post-merger IT integration reference method and all of its routes, since we only got to validate the standardization route of the method by means of a case study.

## 1.6 Results

These are the deliverables, which were produced during this research:

- A list of factors influencing Integration success has been constructed;
- The known strategies for IT integration have been examined;
- An overview of critical success factors have been prepared from the existing IT integration strategies;

- A post-merger IT integration reference method has been developed, which can be used by companies willing to integrate their IT with that of their merging partner;
- Next to the expert interviews an extensive case study was performed at Rentokil Initial and Initial Hokatex, which validated some of the main steps within the first three phases of the post-merger integration method.

## 1.7 Thesis structure

The structure of this research is as follows:

- First an introduction to this research shall be given, in which the context and goal of the research are described. This includes the motivation, on which this research is based, the scientific and social relevance and a short introduction to the literature available on the topic. The objective of the chapter describes the research objective, the research questions and the research deliverables;
- The second part of this thesis consist of the related literature research on the topic of mergers and acquisitions, IT integration, IT centralization and change management. In this part the factors influencing the IT integration were examined and an overview of merger success factors and best practices is formed;
- The third part of the thesis is based on the assembly of the post-merger IT integration method. This step resulted in an IT integration method with various routes, in which the standardization route was fully modeled and described;
- The last part of the thesis document the method was validated by means of expert interviews and an extensive case study at Rentokil Initial and Initial Hokatex. Finally a discussion on the conclusions and recommendation to future researched is provided.

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## 2 THEORETICAL FRAMEWORK

In this chapter the theoretical framework is described. Mainly scientific literature concerning mergers and acquisitions, IT integration, IT centralization, change management and method engineering. First an extensive problem statement will be given to provide insight in the theoretical part of this research.

### 2.1 Problem statement

In the article of Berkman (2001), He described that: “companies are centralizing because it is more cost-effective than having a decentralized environment, it allows them to create consistent technology standards across the enterprise and it cuts down on “reinventions of the wheel” that occur when separate business units devise identical solutions to the same problems”. Berkman also stated that the research on the recentralization trend described above started in the late 1990’s.

Another example of recentralization is stated by Brown (2002), Brown claims that: “The negative force of multiple Information Technology (IT) systems within a single organization has propelled the pendulum to swing back to centralization”.

Mehta and Hirschheim, (2004) describe that: “recentralization also affords greater efficiencies (economies of scale), standardization and integration”. This is where the IT integration process comes into play. IT integration forms a necessary part when mergers are announced. There are a lot of definitions, which describe Integration, the one that fits this research best is the definition formed by Mehta and Hirschheim, (2004): “the term integration is used to imply a ‘blending together of organizational components’ including IT components such as IT infrastructure, IT processes, applications, people and culture”.

Batelaan and van Essen, (2000) state that: “IT integration during a merger, often proves unsuccessful”.

They also describe that the low success is mainly caused by: “the overestimation of the expected synergies and the underestimation of the post-merger integration process”.

The centralization and integration of IT between organizations, with their own IT departments and IT infrastructures is a complex task, involving multiple strategies and pathways. The strategies available often have an abstract nature. These should be translated into tactical considerations (such as concrete plans e.g. a roadmap), so the management team can get an overview of the necessary steps to take, during the post-merger IT integration process. Roehl et. al., (2008) states that a well-defined roadmap, should include the following aspects: “specific and clear goals, a detailed approach and lists all resources and time required to reach these goals”.

After a thorough literature research it became clear that there is very little literature available, which directly defines the post-merger IT integration process, this is also being stated by Mehta and Hirschheim (2004). To define the post-merger IT integration process Roehl et. al., (2008) described that:

“an integration roadmap is needed to provide an executable plan for the overall integration and that the final roadmap should outline how to proceed through the IT integration process”.

They also states the following: “an effective IT integration roadmap is a critical enabler of an effective merger integration”.

## 2.2 Terminology

The aim of this section is to situate the research within the proper context. The context is defined by the terms mentioned in and directly affecting the main research question:

*“ How can a reference method for the successful integration of IT within the post-merger process between organizations be developed and validated?”*

- Centralization
  - “Centralization covers various management centralizing functions such as centralizing: information policy, risk management, shared services and hardware and software” (Evaristo et. al., 2005).
- Change management
  - “Change management provides general guidelines for conducting changes, from the early specifications to the final deployment and evaluation” (ITIL, 2007).
- Critical Success factors
  - “Are those aspects of a strategy that must be achieved to successfully meet objectives and, if possible, to secure competitive advantage” (Argote et al. 2000).
- Enterprise Architecture
  - “Enterprise Architecture is the collection of texts and models concerning the complete information infrastructure of an enterprise in relation to the enterprise functions” (Lankhorst, 2006).
- IT integration
  - “The term integration is used to imply a ‘blending together of organizational components’ including IT components such as IT infrastructure, IT processes, applications, people and culture” (Mehta and Hirschheim, 2004).

- Merger
  - Merger in merger and acquisitions means that two organizations (roughly similar to each other) form one organization. We will use this term, to highlight the IT integration between organizations or divisions of an organization.
- Method Engineering
  - “Method engineering is the engineering discipline to design, construct and adapt methods, techniques and tools for the development of information systems” (Brinkkemper, 1996). The diagramming techniques are based on meta-modelling technique described by Van de Weerd and Brinkkemper (2006).
- Post-merger process
  - The post-merger process is the process that follows after the integration deal is closed (pre-merger phase). In this phase an integration plan is made, which can be executed and where an effective integration of divisions and processes should be clear to the all stakeholders.
- Reference method
  - A reference method is a method created by combining various existing method fragments into one.
- Roadmap
  - “A roadmap is an effective way to evaluate how to (most effectively) move the integration forward and maintain momentum” (Roehl et. al., 2008).
- Organizations
  - Within this research an organization can be a single organization, which contains multiple IT divisions with their own IT infrastructure and processes or a company willing to integrate their IT with that of their merging partner.

### 2.3 Mergers and acquisitions

As stated in the terminology we will use the term merger in merger and acquisitions (M&A) to highlight the IT integration between organizations or divisions of an organization. It is the process, in which two or more companies decide to join. This merger is restricted to mergers between two parties (horizontal mergers), which is the most common merger case (Wijnhoven et. al., 2006).

An acquisition is when one company takes over another company and owns it. The merging company then ceases to exist. We will focus our research on merging organizational components mainly the IT departments.

A merger consists of three broad phases, occurring in succession: pre-merger, merger and post-merger. In the pre-merger phase there is a strategy within an organization that leads to the choice of a merger and acquisition, an organization looks at potential partners. The organization internally researches if the potential partner is a good choice.

In the merger phase the negotiations with the potential partner are made and the partner organization is further examined. To uncover opportunities and to reorganize and consolidate IT operations and synchronize them with the overall business strategy a comprehensive IT due diligence review should be performed. As described by Bhatia. (2007) IT due diligence and post-merger planning are inextricably linked. If all factors have been assessed thoroughly the deal will be closed.

In the post-merger phase the actual integration of organizational components can be started. In this phase an integration plan is made, so the integration can go forward.

We will limit this research to the Integration phase of M&A meaning the post-merger integration phase. Within this phase we will limit to the part of IT integration, since Mehta and Hirschheim. (2004) stated that there is very little literature available, which directly defines the post-merger IT integration process.

Furthermore the merger of the IT of Rentokil Initial and Initial Hokatex stands in the post-merger phase of their integration. The corporate side of their merger has already been completed.

## 2.4 IT Centralization

Centralization covers various management centralizing functions such as centralizing: information policy, risk management, shared services and hardware and software” (Evaristo et. al., 2005). One of the advantages of centralization is the improvement of communication flow as it relates to IT policy creation and interpretation (Berkman, 2001).

Berkman, (2001) also described that in a decentralized environment, an organization may have to consult a large number of people responsible for IT management or other organization leaders to implement an IT-specific change. Decision making can be a faster process in a centralized environment. Centralization directs the authority and responsibility for the decision to a smaller group of people.

We included IT centralization in this research since little to no literature research discusses the connection between IT centralization and IT integration. This research will find out if similar processes of IT centralization success factors are also suitable for IT integration. It should be taken into account that centralization is focused more on the IT hardware architecture and data redundancy.

IT integration is focused on all different parts of IT integration, including IT components such as IT infrastructure, IT processes, applications, people and culture” (Mehta and Hirschheim, 2004)

## 2.5 IT integration

As stated in the terminology the term integration is used to imply a ‘blending together of organizational components’ including IT components such as IT infrastructure, IT processes, applications, people and culture (Mehta and Hirschheim, 2004). They describe that the term integration here implies a specific kind of merger and not the actual process of combining the organizational assets and management of the merging partners.

As stated earlier we will limit this research to the Integration phase of M&A meaning the post-merger integration phase. Within this phase we will limit to the part of IT integration.

Post-merger Integration is described in literature as one of the most complex areas to realize synergy in (PWC, 2009). PWC, state that large-scale integrations, usually are IT-related and that the IT integration brings a lot of work along with it. They also described factors as interdependencies of IT and its relation to Human resources, finance, supply chain and customer relationship management.

PWC, (2009)state that the IT integration strategy is successful when it is aligned with the company-wide strategic objectives. They also describe that the chosen strategy must be tailored to meet the requirements of the merging organization. This will be taken into account during the development of the post-merger It integration method.

## 2.6 Change management

Change management provides general guidelines for conducting changes, from the early specifications to the final deployment and evaluation (ITIL, 2007). The change management process focuses on getting control on changes related to the IT infrastructure or improvements within the organization. This process insures that the problems, which can occur during changes are controlled and limited.

Change management involves controlling the process, which takes place during the implementation of changes in the IT environment. A request for change (RFC) can be issued when the IT environment encounters problems during or after a change, as well as a direct request to implement new systems or functionalities.

The main objective is to minimize new potential problems and decrease incidents for the IT service desk. ITIL however, describes that it is often so that incidents are related to changes. Additional factors may also have a bad impact, insufficient testing, limited resources or simply unforeseen problems.

To summarize change management ensures that standardized methods and procedures are used when making changes to the IT environment. The main objective is that the probability of interference caused by the changes is minimized (ITIL, 2007).

## 2.7 Method engineering

Weerd and Brinkkemper (2008), have described the technique, which is being used for modelling the activities and artifacts of a certain process. According to this technique, a process-deliverable diagram (PDD) of the project-based approach to competitive analysis framework has been constructed. This PDD consists of two meta-models; the meta-process model and the meta-deliverable model.

The PDD is simply the connection of the meta-process model with the meta-deliverable model. According to the technique of Weerd and Brinkkemper, this can be accomplished by connecting the activities with a dotted arrow to the produced deliverables.

The left part of the PDD represents the meta-process model. "The meta-process model shows the flow of the activities of the framework" (Booch, Jacobson and Rumbaugh, 1999). Weerd and Brinkkemper describe that: "These activities can contain sub-activities and thereby create hierarchical activity decomposition". The right part of the PDD represents the meta-deliverable model.

According to Weerd and Brinkkemper, the meta-deliverable model consists of concept diagrams, which are basically an adjusted class diagram". They describe that "These models are based on the UML activity diagram and the UML class diagram".

In this research we will use method engineering to model the post-merger IT integration method, which can be used as a roadmap by companies willing to integrate their IT with that of their merger partner.

## 2.8 Enterprise architecture modeling (EAM)

Batelaan and Van Essen (2000), state that there is no single method to assess synergy. In this research the enterprise architecture modelling technique will be used to assess synergy possibilities between the two IT departments of Rentokil Initial and Initial Hokatex. This because the author is familiar with the use of this technique.

Foortshuis and Brinkkemper (2007), state that the main importance of enterprise architecture modeling lies in its holistic approach of all facets of the enterprise. EAM is not restricted to just the IT or just the business related issues, like business processes or business excellence, but it takes into account, all fundamental aspects of the enterprise, as long as they are related to the functioning of the enterprise.



Our main goal with enterprise architecture is to find synergy possibilities and to ease decision making on the level of the board, to give insight in consequences of decisions and to set guidelines/ directions for the lower levels as described by Foortshuis and Brinkkemper, 2007.

The enterprise architecture model consists of the supply chain diagram, the enterprise function diagram at corporate and functional level, an application overlay diagram and an IT infrastructure diagram. The aim of the enterprise architecture models is to give an overview of the enterprise architecture of both merger parties.

### 3 POST-MEGER IT INTEGRATION STRATEGIES

In this chapter the known strategies for post-merger IT integration will be examined and the phases and sub phases, which are related to these strategies will be described.

#### 3.1 Merger and acquisition types

In practice there are four merger and acquisitions types, which can take place. These types are described by Mehta and Hirschheim, (2004) as: vertical integration, horizontal integration, concentric diversification and conglomerate diversification. They speak of a vertical integration, when a firm acquires or merges with another firm, with which it earlier had a supplier-customer relation. A horizontal integration occurs when the merging firms quickly wants to gain growth in production capacity. Within horizontal integration the merging partners have similar businesses and they produce and market their products at the same level of the value chain. Concentric diversification means that a firm acquires another business related in the areas of markets, products or technology. At a conglomerate diversification the main goal of the acquiring firm is to gain profit extracted from the venture. This form of integration causes the target business to remain a separate organization in terms of its business goals, operations and IT functions.

##### 3.1.1 Merger and acquisition approaches

When a company wants to gain possible benefits of a merger and acquisition, than the acquired organization must be integrated. Literature describes organizational integration within merger and acquisitions in four approaches. These approaches describe the desired level of integration of the two companies.

With the help of the merger and acquisition the newly formed organization will merge parts of the acquired company. To achieve the goals of the merger, the degree of business process integration (integration of the primary and secondary processes), between the bodies must be determined. The level of business process integration and the newly formed organizational structure is described by Haspeslagh and Jemison, (1991) as the merger and acquisition approach.

Haspeslagh and Jemison characterize merger and acquisitions into four approaches, These four approaches are absorption, preservation, symbiosis, and holding. They also state that mergers could vary on two dimensions. Within the first dimension, the necessity for strategic interdependence, is the manner, in which value is expected to be created. Within the next dimension, the need for organizational autonomy, is the extent, to which the strategic capabilities of the acquired company need to be preserved. The four approaches within these 2 dimensions stated earlier will now be described.

Figure 3.1 shows the integration approaches described by Haspeslagh and Jemison.

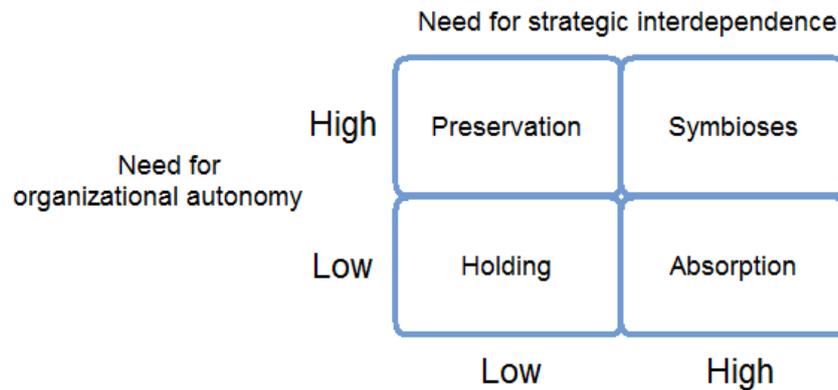


Figure 3.1: Organizational integration approaches

We will start at the first approach, which is “holding”, this integration approach is described by Haspeslagh and Jemison, (1991) as an approach where the acquired company is uninterrupted. Wijnhoven et. al., (2006) described that no integration occurs at holding, therefore in this research we left this integration approach out of the research and the developed IT integration method.

Wijnhoven et. al., described that within the “preservation” integration approach the capabilities of the acquired company are nurtured and maintained in order to allow them to further exploit and develop their capabilities, from which the bidder company can benefit. Since the operations remain autonomous no integration occurs at this integration approach on business process level. They also describe that on the level of IT integration, preservation will keep the two IT departments of the merger partners unchanged and only realizes bridges for data exchange and consolidation where absolutely necessary. For this reason companies willing to choose the preservation integration approach, will not have to go through all the steps of the IT integration method.

Wijnhoven et. al., describe that in the “symbioses” integration approach refers to a merger, in which synergy is created by only combining the strengths of both parties. Within this approach the acquired company and the acquirer are equally transformed to fit each other. Haspeslagh and Jemison describe that the processes in each company, which contribute to the strategic purpose of the merger are left intact and those that are similar are combined to reduce redundancy. Since integration occurs mergers who take a symbioses integration approach, will be able to make use of the developed IT integration method.

In the last integration approach, “absorption” Wijnhoven et. al., describe that the target company is completely absorbed by the bidder company to form one new entity, in which the target company ceases to exist. This implies that this approach requires a full integration of the operation, organizations, culture and IT. Companies using the absorption integration approach will therefore also be able to make use of the developed IT integration method.

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## 3.2 IT integration

Whenever a company decides to merge with their merger partner, it is important to consider different types of IT integration. This because the main question for the merging companies is to what extent to integrate the two IT environments. To get an understanding of the IT integration types that exist, the integration types will now be elaborated.

### 3.2.1 IT integration types

As there are different business integration approaches, there are also IT integration types. Literature described three IT integration types. These IT integration types are complete integration, partial integration, and co-existence (Haspeslagh and Jemison, 1991; Roehl et. al., 2008; Wijnhoven et. al., 2006). The following IT integration types are described by Wijnhoven et. al.

Complete integration is the first IT integration type and is described, as the most ambitious objective in IT integration. Two separate IT environments are merged, which can be completely infeasible in large and decentralized organizations, but may be chosen in smaller firms.

The second IT integration type is *partial integration*. This integration type is aimed to establish priorities. They describe that the most important processes and systems are integrated first and that the remainder is left to a later period. This integration type is usable when synergy possibilities can be realized in some processes but not in others.

The third and last IT integration type is co-existence. This IT integration type will keep the two IT departments of the merger partners unchanged and only realizes bridges for data exchange and consolidation where absolutely necessary. However Wijnhoven et al., does describe that a co-existing IT integration type will only realize minimal operational synergies and may not be desirable in the long term since maintaining and bridging two redundant systems results in high cost, which is not desirable to achieve synergies.

These three IT integration types are also the main routes to choose within the developed post-merger IT integration method. A company must first discover their merger and acquisition approach before the IT integration approach can be chosen. Within the method the different types are depicted as route maps, resulting from the method engineering technique “method engineering” designed by Weerd and Brinkkemper (2006). This will be elaborated later in this research.

To have a quick overview, of which IT integration types corresponds, with which merger and acquisition approach table 3.1 shows a summarization of the different types and approaches. As described earlier, no integration occurs at holding, therefore this approach is not related to an IT integration type. The table is retrieved from Wijnhoven et. al., (2006).

<b>Merger and acquisition approaches</b>	<b><i>IT integration types</i></b>
Absorption	Complete integration
Symbiosis	Partial integration
Preservation	Co-existence
Holding	-No integration-

Table 3.1: MA and IT integration objectives

### 3.2.2 IT integration approaches

Four IT integration approaches can be chosen in relation to the IT integration types discussed earlier. These four IT integration approaches are: renewal, take-over, standardization and synchronization (Wirz and Lusti, 2004; Wijnhoven et. al., 2006; Haspeslagh and Jemison, 1991). A short description will now be described, including the relation the approaches have with the IT integration types.

The first IT integration approach is “renewal”, this means that all the IT of both merged companies is replaced by an entirely new IT. Batelaan and Veltman (2002), describe that the renewal approach often proves not to be very practical, due to the available time and the definition of the necessary IT in a merged process, this can create political strains. Wijnhoven et. al., describe that Managers may still opt to renewal of the IT environment, if neither of the merging partners possess ITs with the capability to support the new company. A short example is that when a merged company, which is not already using a large information system (SAP or ERP), would find it economically feasible to implement one single information system that can be used for the newly formed organization. Wijnhoven et. al., also describe the pitfall of renewal, being that the IT personnel must be trained in maintaining the new system and that all current operations of the systems must be converted to a new system.

Wijnhoven et. al., describes that the “take-over” IT integration approach involves using the IT of one of the merging organizations as the new system of the newly formed organization. Within the take-over approach a fast integration is possible but no new processes or systems will be developed (Wirz and Lusti, 2004). Because of this difficulties can arise in this approach, since the chosen system may lack functions that are crucial in the new merged situation, which requires some changes of functionalities to meet the new situation. For this reason Batelaan and Veltman (2002), describe that scalability of the selected system is a prerequisite for an effective takeover.

Within the “standardization” IT integration approach, the integration of similar IT functions becomes the standard of the newly formed organization. Wijnhoven et. al., describe this integration approach as a common systems approach or better known as a best-of-breed approach.

The best-of-breed approach adapts a mixture of IT, basing the new IT on a combination of the best practices of the two previous ITs can be achieved by a so called best-of breed selection procedure (Wijnhoven et. al., 2006). Wirz and Lusti (2004), describe that by combining the best practices of both ITs can result in economies of scale. The only determination that has to be made when choosing the best-of breed approach is what is actually the best for the newly formed organization.

The last It integration approach is “synchronization”. This approach creates software and hardware bridges to consolidate the data or periodically synchronize the different systems. Wijnhoven et. al., describe that this approach only realizes marginal IT integration, since it preserves the original ITs of both organizations and because the two merger partners keep using their individual information requirements within their own IT environment. The main advantage of the synchronization approach is that there will not be any interruption of the business processes. Wirz and Lusti, describe, that since the newly formed organizations use redundant systems, this will result in the inability to realize economies of scale.

To summarize all the IT integration approaches and to get a quick overview of the difference between them, Wijnhoven et. al., created the following figure (figure 3.2).

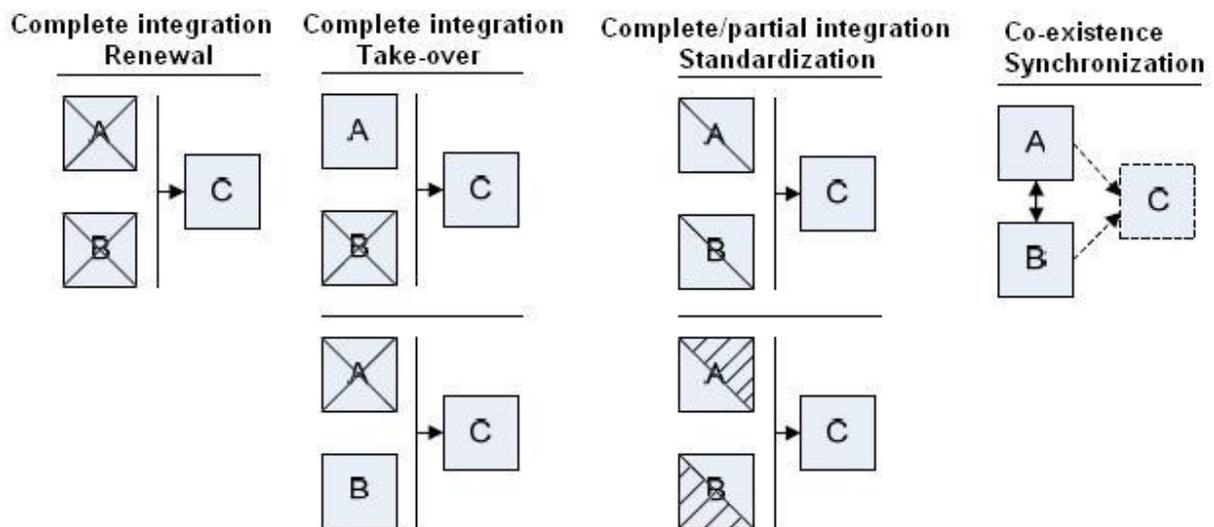


Figure 3.2: IT integration approaches

As can be seen in figure 3.2, at renewal both ITs (A and B) of the merging partners are stopped to form the new IT called C. At take-over the IT of one of the merging partners, either from IT A or B is stopped and the new IT called C, stays equivalent to either A or B. Standardization takes the best parts of IT A and B and forms a new IT called C. And at last synchronization only creates additional information bridges from both ITs to each these bridges are shown as IT C.

These organizational and IT integration approaches are brought back as routes within the post-merger IT integration method. The routes can then be followed by a company willing to integrate their IT with that of their merging partner.

To get a summarization, of which IT integration type is linked, to which IT integration approach we adopted table 3.2 from Wijnhoven et. al. (2006). The table summarizes, which IT integration approach can be realized within, which IT integration type

		IT integration types		
		Complete integration	Partial integration	CO-existence
IT Integration Approach	Renewal	Yes	No	No
	Take over	Yes	No	No
	Standardization	Yes	Yes	No
	Synchronization	No	No	Yes

Table 3.2: IT integration modes

### 3.3 Synergy assessment

Batelaan and Van Essen (2000) state, that there is no single method to assess synergy.

In this research the enterprise architecture modelling technique will be used to assess synergy possibilities between the two IT departments of Rentokil Initial and Initial Hokatex. This because the author is familiar with the use of this technique.

Footshuis and Brinkkemper (2007), state that the main importance of enterprise architecture modeling lies in its holistic approach of all facets of the enterprise. They describe that EAM is not restricted to just the IT or just the business related issues, like business processes or business excellence, but it takes into account, all fundamental aspects of the enterprise, as long as they are related to the functioning of the enterprise.

They also describe that the main goal with enterprise architecture is to find synergy possibilities and to ease decision making on the level of the board, to give insight in consequences of decisions and to set guidelines/ directions for the lower levels.

The enterprise architecture model consists of the supply chain diagram, the enterprise function diagram at corporate and functional level, an application overlay diagram and an IT infrastructure diagram. The aim of the enterprise architecture models is to give an overview of the enterprise architecture of both merger parties.

The technique will also be used to validate the developed IT integration method. This to find synergy possibilities between the two merging partners named earlier, namely Rentokil Initial and Initial Hokatex.

### 3.4 Phases during post-merger IT integration

Roehl et. al. (2008) describes that there are four main components, which apply to nearly to any IT integration. These components are:

- The organizational component
  - Addresses organizational design, the management of the IT integration, IT function preparedness, communications, and change management;
- The guiding principles
  - Should help set the direction and expectations for the integration. The component should also provide a consistent approach for IT leadership in reinforcing integration priorities;
- The integration approach
  - Should help establish the overall structure of the IT integration, including the degree of integration between the IT functions of the merging companies;
- The integration plan
  - Should describe how the future state of the IT function will be achieved and include an assessment of the current state, a gap analysis, and a description of the initiatives required to close the gap. The integration plan should also include a timeline, major milestones, and key deliverables.

For the main IT integration components described above the IT integration phases where extracted from ITIL (2004), Bentley (2000) and Ravesteyn (2007). These phases can be used in any project and will give the project a guideline to follow within the project. The phases are:

- Initiation phase;
- Orientation phase;
- Analysis phase;
- IT integration phase;
- Management phase.

#### IT integration phase 1: Initiation

The initiation phase is the start of the project. In this phase, the reason for the project is discovered and explained. The main goal of this phase is to study the achievability of the project at hand. In this phase a business case is written to justify the integration project and is used to obtain top management commitment. According to Ravesteyn, top management commitment is considered a general success factor for any project. Bentley described that the usage of a business case within the initiation phase, is required by various formal project management methods, which includes the widely-used project management method Prince 2.

#### IT integration phase 2: Orientation

The orientation phase is concerned with the decisions, which are made about the existing resources and about the scheduling of the existing resources.

#### IT integration phase 3: Analysis

Roehl et. al., (2008) describe that in this phase, one should begin the detailed, tactical level analysis of the IT integration process. Mainly the gap/fit analysis, rationalization and selection of processes, systems, infrastructure, hardware, vendor contracts and license agreements. This process should also include an assessment of the cost savings revenue enhancement and risk avoidance.

#### Phase 4: IT integration phase

Roehl et.al., (2008) described that this phase should help establish the overall structure of the integration, including the degree of IT integration between the IT functions of the merging companies.

#### Phase 5: Management phase

In order to measure the success of the IT integration project, the process (Ravesteyn, 2007) and knowledge sharing performance will be evaluated. Information about the performance can be used to increase the success of future IT integration efforts.

### 3.5 Critical success factors

According to the phases described above the researchers performed their literature study to find the corresponding critical success factors per IT integration phase.

Argote et. al., (2000) described that critical success factors (CSF) are those aspects of a strategy that must be achieved to successfully meet objectives and, if possible, to secure competitive advantage. For the IT integration components and the IT integration phases the researchers found strategies, which ensure success at every step in the Integration process

To create a list of all known strategies for each integration phase within the post-merger IT integration method, information was studied from journals, reports, thesis and conference papers. The literature study reached its end when the researcher reached the point of saturation This means that the researchers stopped their data collection, when they could not find any new information on the selected cases or the issues relevant to them (Hart et. al., 2007). When they have come to the point that they have found enough examples of the manifestations on the subject they are studying, they may complete their analysis of the examples.

With the information gathered from the literature study performed during this research the researcher created an overview of the critical success factors (CSF) and best practices affecting the Post-merger IT integration process. The overview can be found in table 4.1. Within the overview the CSF's are categorized per IT integration phase. This table was formed by means of saturation of the literature studied.

## 4 OVERVIEW OF CRITICAL SUCCESS FACTORS

In this chapter the critical success factors, which were discovered through literature research will be displayed. These critical success factors need to be success fully processed in order for an IT integration within a post-merger process to be successful.

### 4.1 Critical success factors

With the information gathered from the theory study we created an overview of the critical success factors (CSF) and best practices affecting the Post-merger IT integration process. The overview can be found in table 4.1. Within the overview the CSF's are categorized per IT integration phase.

These IT integration phases are, the:

- Initiation phase;
- Orientation phase;
- Analysis phase;
- IT integration phase;
- Management phase.

Within the table the research domains, in which they were found are stated as well as the reference to the documents, in which the identical CSF was stated.

With the creation of the table and the literature study, the following research questions have been answered:

- *RQ2 “Which critical success factors can be extracted from the existing IT integration strategies?”*
- *RQ3 “Which factors influence IT integration success?”*
- *RQ4 “What should an IT integration reference method contain?”*

Table 4.3: Overview of merger success factors and best practices

IT integration phases (CSF's/ best practices)	Reference document	Research domains		
		M&A IT Integrating	IT Centralization	Change Management
<b>Initiation phase</b>				
Create a decision making structure (Who will do what at top management level, to minimize disruption to operations)	(Wirz, 2004), (Evaristo, 2005), (Batelaan, 2000), (PWC, 2009), (Mitleton-Kelly, 2004), (Berkman, 2001), (ITIL, 2004), (Brown, 2005)	X	X	X
Create Clear IT vision and strategic vision (which is credible and feasible)	(Wijnhoven, 2006), (Chang et. al., 2002), (Recklies, 2001), (Batelaan, 2000), (PWC, 2009), (Epstein, 2005), (Mitleton-Kelly 2004)	X	X	
Create Clear Project Mission with clear objectives and goals (Set the course)	(Batelaan, 2000), (PWC, 2009), (Fortune and White, 2004)	X	X	
Write business case and create business model	(Ravesteyn and Versendaal, 2007), (Batelaan, 2000), (Epstein, 2005), (Mitleton-Kelly, 2004)	X	X	
Obtain top management commitment both IT and business (involvement and funding of IT budget, collaboration and partnership with business leaders )	(Ravesteyn and Versendaal, 2007), (Chang et. al., 2002), (PWC, 2009), (Brown, 2005)	X	X	



<b>Orientation phase</b>				
Involve IT team in Integration (as soon as possible)	(Chang et. al., 2002), (Brown, 2005)	X		
Staff qualification (assess know-how and prior merger experience) (Resource capacity analysis)	(Recklies, 2001), (Wirz, 2004), (Roehl et. al., 2008), (PWC, 2009), (Epstein, 2005), (Berkman, 2001)	X	X	
Assess need for external staff (if personnel lacks know-how) outsourcing	(Wirz, 2004), (Chang et. al., 2002)	X		
Team up IT personnel with IT personnel of merger partner	(Wirz, 2004), (Berkman, 2001)	X	X	
Assign project team(s) and create staffing plan	(Roehl et. al., 2008), (PWC, 2009), (Epstein, 2005), (ITIL, 2004), (Brown, 2005)	X	X	X
Assign responsibilities to teams	(Wirz, 2004), (Epstein, 2005), (Berkman, 2001)	X	X	
<b>Analysis phase</b>				
Identify business decisions (strategy, operating model/ processes)	(Chang et. al., 2002), (Mehta, 2004), (Epstein, 2005), (Berkman, 2001), (Brown, 2005)	X	X	
Align business with IT strategy	(Chang et. al., 2002), (Wijnhoven, 2006), (Henderson and Venkatraman, 1992), (Berkman, 2001), (Brown, 2005)	X	X	
Evaluate the opportunities of both partners (competitive advantages)	(Recklies, 2001), (PWC, 2009), (ITIL, 2004)	X		X
Assess IT maturity	(Lam, 2006), (ITIL, 2004)	X	X	
Assess extend of IT Due Diligence	(Kersten, 2002)	X		
Perform IT Due Diligence (To identify synergy in the merger and to get a detailed asset inventory). With the help of Enterprise Architecture	(Roehl et. al., 2008), (Chang et. al., 2002), (Recklies, 2001), (Batelaan, 2000), (PWC, 2009), (Epstein, 2005), (Buono, 2005)	X	X	
Create IT synergy targets	(Roehl et. al., 2008)	X		
Estimate synergy possibilities	(Wirz, 2004), (Evaristo, 2005), (Batelaan, 2000) (Foortshuis and Brinkkemper, 2007)	X	X	
Design the future state of IT	(PWC, 2009)	X		
Set priorities, conditions and direction	(Mitleton-Kelly, 2004), (Roehl et. al., 2008), (Wijnhoven, 2006)	X	X	
Choose IT integration strategy	(Roehl et. al., 2008), (Wijnhoven, 2006), (Epstein, 2005)	X		
<b>Choose integration types</b>				
Complete integration/ Full integration	(PWC, 2009), (Roehl et. al., 2008), (Wijnhoven, 2006), (Haspeslagh and Jemison, 1991)	X	X	
Partial integration/ Stand-alone integration	(Wirz, 2004), (Roehl et. al., 2008), (Wijnhoven, 2006)	X		
Co-existence/ Partial integration	(Wirz, 2004), (Roehl et. al., 2008), (Wijnhoven, 2006)	X		
<b>Choose integration approaches</b>				
Renewal	(Chang et. al., 2002), (Wijnhoven, 2006)	X		
Take-over	(Chang et. al., 2002), (Evaristo, 2005), (Wijnhoven, 2006)	X	X	
Standardization/ synchronization	(Chang et. al., 2002), (Wijnhoven, 2006)	X		
<b>IT process Integration</b>				
Find overlapping IT processes	(Batelaan, 2000), (Foortshuis and Brinkkemper, 2007), (Roehl et. al., 2008), (Wijnhoven, 2006) (Wirz, 2004)	X	X	X
List best practices	(ITIL, 2004), (Roehl et. al., 2008), (Wijnhoven, 2006) (Wirz, 2004)	X	X	
Integrate laws and regulations	(ITIL, 2004), (Roehl et. al., 2008), (Wijnhoven, 2006) (Wirz, 2004)	X		



IT systems Integration				
List used systems	(Batelaan, 2000), (Foortshuis and Brinkkemper, 2007), (Roehl et. al., 2008), (Wijnhoven, 2006) (Wirz, 2004)	X	X	X
Find overlapping system functionalities	(Foortshuis and Brinkkemper, 2007), (Roehl et. al., 2008), (Wijnhoven, 2006) (Wirz, 2004)	X	X	X
System take-over	(Wirz, 2004), (Evaristo, 2005), (Wijnhoven, 2006)	X	X	
Best-of Breed selection	(Wirz, 2004), (Wijnhoven, 2006)	X		
System disconnection	(Wirz, 2004), (Wijnhoven, 2006)	X		
New system development	(Wirz, 2004), (Berkman, 2001), (Wijnhoven, 2006)	X	X	
Integrate data from IT systems	(Brown, 2005), (ITIL, 2004)			
IT infrastructure integration				
Define IT infrastructure	(Foortshuis and Brinkkemper, 2007), (Wirz, 2004)	X	X	
Assess infrastructures compatibility	(Chang et. al., 2002), (Berkman, 2001)	X	X	
Centralized environment	(Mehta, 2004), (Evaristo, 2005) (Berkman, 2001)	X	X	
Shared environment	(Mehta, 2004)	X		
Decentralized environment	(Mehta, 2004), (Evaristo, 2005), (Berkman, 2001)	X	X	
Assess data center compatibility	(Brown, 2005)	X		
Develop equipment move strategy	(Brown, 2005)	X		
IT personnel integration				
Decrease fear and uncertainty (Inform and reassure personnel)	(Wirz, 2004), (Recklies, 2001), (Epstein, 2005), (Buono, 2005), (Berkman, 2001)	X	X	
What are the responsibilities of the newly formed IT department personnel	(Wirz, 2004, Preston, 2001)	X	X	
Building staff commitment	(PWC, 2009), (Brown, 2005)	X		
Cultural change and integration (Customs, expectations and facilities)	(Chang et. al., 2002), (Batelaan, 2000), (Epstein, 2005), (Buono, 2005), (ITIL, 2004)	X	X	X
Management phase				
Program management (What are the key program requirements)	(Chang et. al., 2002), (Ravesteyn and Versendaal, 2007), (Roehl et. al., 2008)	X		
Risk management plan (Also the unexpected factors) Minimize risk	(Batelaan, 2000), (Epstein, 2005), (Zwikael and Globeroson, 2006) (Brown, 2005)	X	X	
Establish Key Performance Indicators (KPI's)(financial, technical and people)	(Roehl et. al., 2008), (Epstein, 2005), (Evaristo, 2005)	X	X	
Milestone monitoring	(Roehl et. al., 2008), (ITIL, 2004)	X		X
Develop IT Integration plan and time schedule	(Roehl et. al., 2008), (Batelaan, 2000), (PWC, 2009), (ITIL, 2004)	X		X
Create detailed IT Integration plan	(Roehl et. al., 2008), (PWC, 2009), (Buono, 2005), (Zwikael and Globeroson, 2006)	X		
Construct major deliverables	(Roehl et. al., 2008),	X		X
Evaluation phase				
Hold weekly meetings to evaluate status of the integration (Updates on progress)	(Epstein, 2005), (Mitleton-Kelly, 2004), (ITIL, 2004)	X	X	X
Perform constant feedback	(ITIL, 2007) (PWC, 2009), (Berkman, 2001)	X	X	X

In addition to the most important success factors stated in table 4.1, there are also the evaluation phase factors. These factors will ensure a successful completion of the project. Yet these are not integrated in the post-merger IT integration method, since these point should always be performed when executing a project.

It should be taken into account that no method fits all, the method was constructed with the help of CSF's and best practices. There will definitely be other processes and activities, which could be implemented in future research.

## 4.2 IT integration conditions

For the CSF's to be a success in any IT integration project, there are some conditions a company should have met before starting an IT integration project. Achieving the proposed goals and objectives is highly dependent on the following conditions. IT departments willing to integrate their IT with that of their merging partner should meet the following conditions described by Wijnhoven et. al. (2006).

- Specification of procedures
  - The business strategy, structure and (work) procedures must be well specified in advance to the IT integration process.
- Keeping the business operational
  - Keeping the organization operational during the integration process, and to avoid uncertainty and insecurity among employees and customers. This requires the integration of mission-critical and strategic systems first.
- Do not start if you have unsolved problems
  - IT-projects that are conditional to the integration must be working well already.
- Plan and calculate the project
  - The IT integration requires a proper budget, time frame, and IT policy.
- Do not implement dramatic changes
  - The desired working procedure and operations must be compatible with the capacities and capabilities of the existing IT.

A company willing to use the developed post-merger IT integration method should first assess if they have met the necessary IT integration conditions before proceeding to the actual IT integration.

## 4.3 Integration constraints

Next to the conditions, which have to be met to make an IT integration project a success there are also some constraints, which have to be kept in mind before starting an IT integration project. IT departments willing to integrate their IT with that of their merging partner should have thought about the following constraints. These constraints and conditions are extracted from Wijnhoven et. al. (2006), Epstein (2005) and Roehl et. al. (2008).

- User participation
  - The members of the other IT department should participate actively and have to be willing to communicate openly.

- Early planning
  - Early planning for the integration of the new physical and human assets improves the chances of success
- Realizing merger results in the shortest time possible
  - Fast-paced integration and early pursuit of available cost savings improves outcomes.
- A leader must be chosen among the two IT divisions
  - Managers must assign a merger integration leader and provide appropriate incentives.
- Cultural differences
  - Managers must be aware of cultural differences between organizations and avoid conflicts, in part, via frequent, tailored communication with employees, customers and stakeholders.
- Capacities resources and talents
  - Particularly in mergers involving technology and human capital, managers must capacities resources and talent that resides within the other party.
- Technological constraints
  - Integrating two IT divisions often encounters technical and operating logic incompatibilities. These must be overcome by performing synergy assessments.

To meet these constraint and to make it easier for a company willing to integrate their IT with that of their merging partner, we implemented these constraints in the developed post-merger IT integration method. By doing this the most important constraints cannot be avoided and should managed.

#### 4.4 IT integration risks

Batelaan and van Essen (2000), describe that during an IT integration project the same mistakes occur again and again. They listed the most prominent pitfalls during this process.

Have an integration roadmap available. An effective IT integration roadmap is a critical enabler of effective merger integration (Roehl et. al., 2008). The moment the deal is signed and sealed, the IT management should already know what to do in the first hundred days. If not, the chance exists that the IT department will lose momentum (PWC, 2009).

Synergy must be assessed thorough. Batelaan and van Essen describe that understanding the similarities and differences between the components is a prerequisite for realistic assessment of synergies and managing their realization. Merging activities, which differ too much from each other without management recognition are an excellent recipe for chaos and structural costs. The reason for this is that the complexity increases, while the ability to handle complexity decreases.

During the IT integration process both parties should be treated as equals. This is only justified if the two IT divisions can benefit from each other (Batelaan and van Essen, 2000). That is why none of the partners should claim dominance. If this happens than any attempt to equal integration is doomed to fail.

Two instable partners should not be integrated, because integration processes after mergers lead to great complexity and requires the highest possible demands of managerial ability (Wijnhoven et.al., 2006). Batelaan and van Essen, state that it is important to start from a stable baseline within both IT divisions. If a stable platform is not present it can lead to chaos and mutual burrow, and often leads to breakup of the merger.

Batelaan and van Essen also describe that, If the IT department does not appoint the right persons at the right place, each party will try to lead the project. It is better to disappoint a few people in an early stage than to create continuous uncertainty.

Cultural differences should not be ignored. In practice, most cultural differences can be bridged in the short term, only when they are recognized and respected within a framework of common values. Else cultural differences can get out of hand.

The costs that should not be forgotten are the costs for the creation of equal working conditions, migration costs, costs of possible consultants, the cost of removal and of redundant IT components such as IT infrastructure, IT processes, applications, people and culture (Mehta and Hirschheim, 2004) and commotion expenses (loss of productivity and organic growth caused by the integration) (PWC, 2009).

Next to these risks there is also the risk of time. As described by Batelaan and van Essen many problems solve themselves in part or in whole over time. This is especially true for risk factors such as personnel, support and culture. Because IT complications often take longer than initially planned. Therefore they describe that many of these risks are better controlled, when the implementation is spread over time. Mehta and Hirschheim state that this will ensure a consistent line and is much more decisive for holding momentum.

At last but not least there always appear to be unpredictable problems. These may include financial problems, problems with the quality of the delivered services and processes but also staff, administrative, or even fraudulent problems. Keeping these and the other risks in mind and anticipating to these risks the project can be executed successfully.

To assure the risks will be kept at a minimal level, the risk factors are processed in the developed post-merger IT integration method.

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## 5 DEVELOPMENT OF THE REFERENCE METHOD

In this chapter the developed reference method will be depicted and described according to the method engineering technique. But first the scope of the project will be indicated.

### 5.1 Scope of the research

The parts that will be in-/excluded from this research will now be described.

Literature describes that the development of an IT integration roadmap is an important component to ensure overall integration effectiveness (Roehl et. al., 2008). Doing this a concrete and structured action plan can be developed, which can help companies willing to integrate their IT with that of their merging partner. they described that an actionable IT integration roadmap is usually organized into the following four specific areas: “Organization, Guiding Principles, Integration Approach, and Integration Plan”. These areas directly address the post-merger IT integration process. And since Mehta and Hirschheim (2004) describe that: “there is very little literature available, which directly defines the post-merger IT integration process”, the focus of our research lies in the development of a roadmap for these four areas.

Bhatia (2007) described the following: “organizations often fail to realize the objectives of a merger, due to the lack of a proper IT integration roadmap as a part of the due diligence”. He also described that: “the IT due diligence process and the post-merger integration planning are inextricably linked”, for these reasons IT due diligence will also be integrated in the proposed IT integration roadmap. Since a whole due diligence would not fit the planning and scope of this project, this research is limited to describing the phases (within a due diligence) directly related to IT integration, these are described by Bhatia as “the IT infrastructure, IT processes and applications phase”.

Some advantages of a comprehensive IT due diligence review are stated by Bhatia. He states that an IT due diligence review can “identify synergies during an integration and uncover opportunities to reorganize and consolidate IT operations”. But the most important reason according to Bhatia is that it helps to “identify IT assets and processes, determine whether the IT assets and processes possess the flexibility to meet future business objectives and gauge the impact of the merger on the future cash flows, costs and revenue of the business”.

Literature describes that people issues are an important part of IT integration. Lai (2007) confirms this by describing that “IT integration success can never be possible without the professionalism and execution excellence dedicated by the staff” and that “people issues will always remain a critical factor to merger success, especially as we are not only merging the systems but also the teams”. Unfortunately people issues along with their cultural differences, are not discussed in depth during this project, because of scoping issue.

## 5.2 Method engineering

Weerd and Brinkkemper (2008) have described the technique, which is being used for modelling the activities and artifacts of a certain process. According to this technique, a process-deliverable diagram (PDD) of the project-based approach to competitive analysis framework has been constructed. This PDD consists of two meta-models; the meta-process model and the meta-deliverable model. The PDD is simply the connection of the meta-process model with the meta-deliverable model. According to the technique of Weerd and Brinkkemper, this can be accomplished by connecting the activities with a dotted arrow to the produced deliverables.

The left part of the PDD represents the meta-process model. “The meta-process model shows the flow of the activities of the framework” (Booch, Jacobson and Rumbaugh, 1999). Weerd and Brinkkemper describe that “these activities can contain sub-activities and thereby create hierarchical activity decomposition”. The right part of the PDD represents the meta-deliverable model. They also describe that the meta-deliverable model consists of concept diagrams, which are basically an adjusted class diagram”. These models are based on the UML activity diagram and the UML class diagram

## 5.3 Meta model construction

The meta model of the post-merger IT integration reference method is shown in figure 5.2. However the post-merger IT integration reference method does not contain the right part of the PDD. Within the method I made use of routemaps, which show the different routes, which can be taken in the method depending on the integration situation.

For example, a company willing to integrate their IT with that of their merging partner starts at the initiation phase within the post-merger IT integration reference method (see figure 5.2). At this point decisions have to be made about the integration, such as what is the integration objective, complete integration, partial integration or co-existence, this is based on what the business merger objective is.

After this they can decide what to do with their processes, systems, infrastructure and personnel. The reference method will than show, which route the organization should take, renewal, takeover, standardization or synchronization. This is where the different routes within method engineering show their advantages.

In this research only the standardization route will be depicted and described completely, due to scoping issues and the fact that the case study of Rentokil Initial and Initial Hokatex pointed out to the use of standardization during their merger.

First we will show the meta model diagram (depicted in figure 5.1), on which the developed method is based. This diagram show the flow from activity to activity. With this diagram one can get a view of the main phases within the developed post-merger IT integration method.

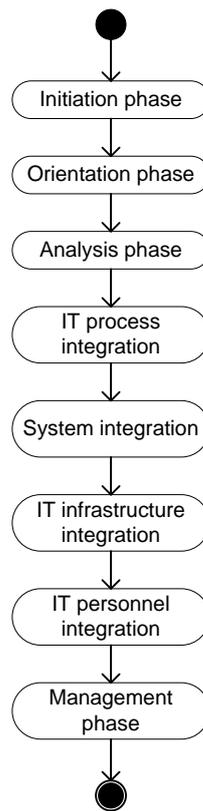


Figure 5.1: Activity diagram post-merger IT integration method

In figure 5.2 we will show the meta process model of the post-merger IT integration reference method containing the various routes. After that the standardization route within the method will be elaborated per phase and all individual steps will be described. To view the PDD of the standardization route method as a whole, refer to Appendix 1.

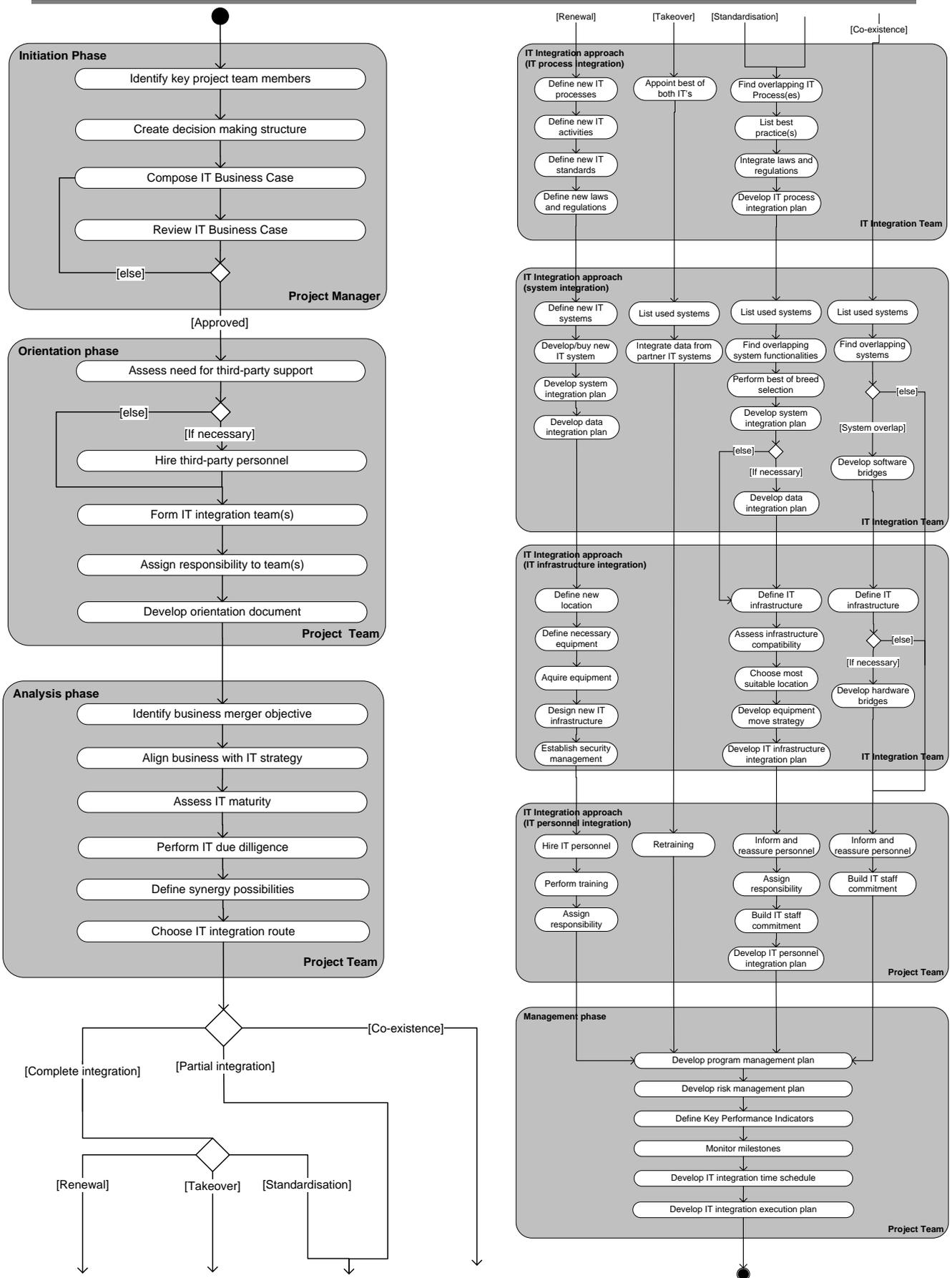


Figure 5.2 : Post-merger IT integration reference method

Now the standardization route method within the method, will be elaborated and described. This will be done per phase.

## 5.4 Meta model of the initiation phase

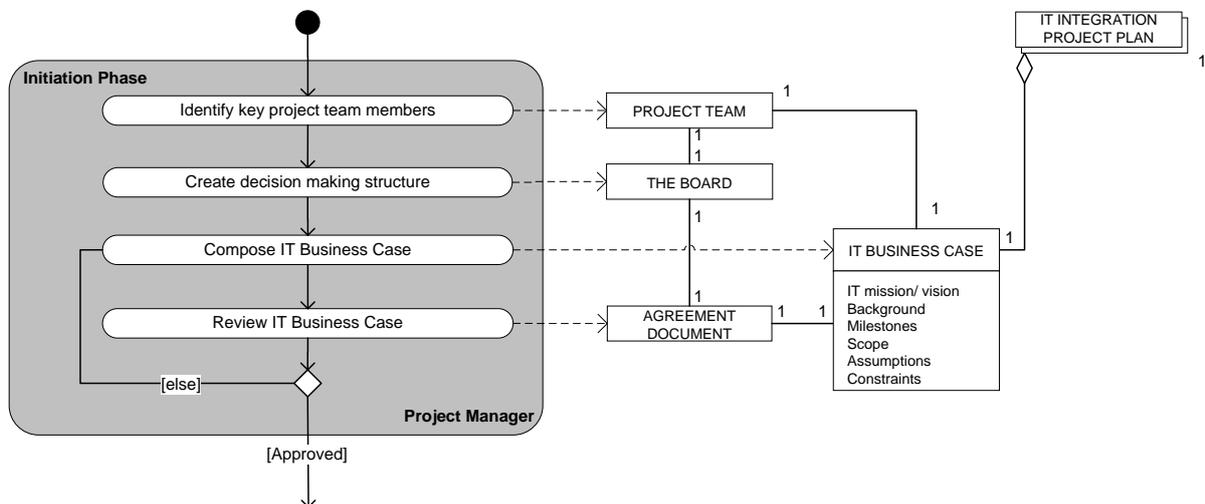


Figure 5.3: Initiation phase of standardization route

The initiation phase contains 4 sub activities, which will be described below. In the first sub activity (Identify key project team members) the Project Manager identifies the key team members, to form a PROJECT TEAM who will lead the project. These usually are the IT managers of the two IT departments.

This sub activity is followed by creating a decision making structure. By doing this, the Project Manager establishes THE BOARD, which can solve difficult decisions, driving the integration of business operations, without holding the integration back. The board usually consist of CIO's and IT directors.

After a board has been established an IT business case must be composed. the IT BUSINESS CASE assists the involved management functions, to determine whether to go on with the IT integration project or not. This is where The Project Team composes a completely defined IT BUSINESS CASE.

Finally the IT BUSINESS CASE must be approved by THE BOARD. THE BOARD reviews the IT BUSINESS CASE. Either they approve it with an AGREEMENT DOCUMENT, in which case the IT roadmap continues, or they disapprove it, in which case the Project Team must rewrite the IT BUSINESS CASE.

## 5.5 Meta model of the orientation phase

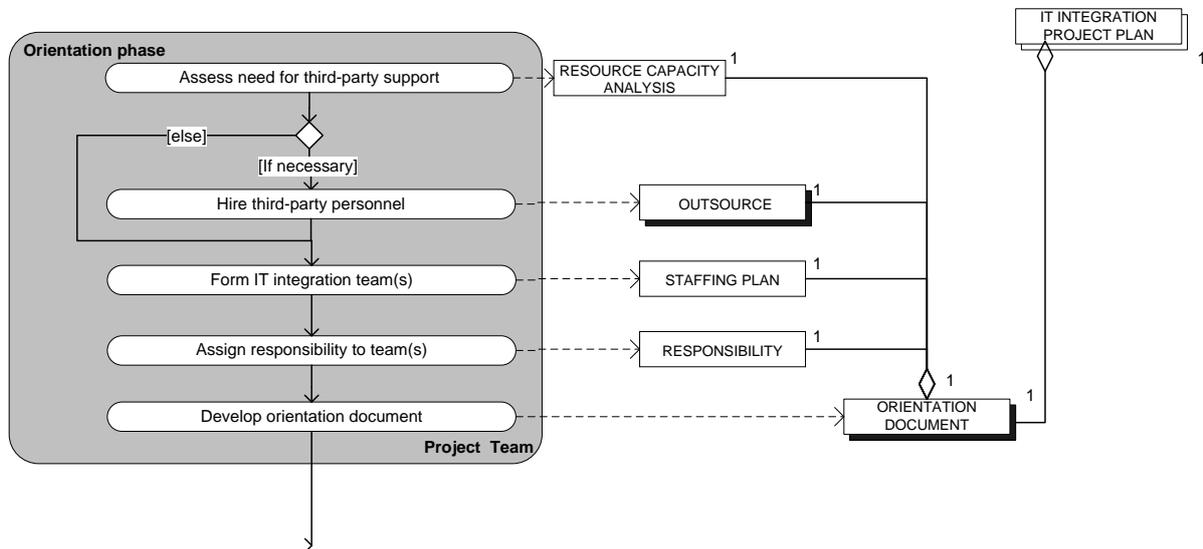


Figure 5.4: Orientation phase of the standardization route

Within the orientation phase the first sub-activity is to assess the need for third-party support. If the IT BUSINESS CASE is approved, the Project Team completes a RESOURCE CAPACITY ANALYSIS. This to determine the availability of existing resources and to assess the need for third-party support, needed to form and execute the IT integration roadmap.

If the Internal IT personnel do not possess the required know-how to execute the IT integration, the Project Team will have to OUTSOURCE integration tasks. The Project Team will hire third-party personnel “such as technical consultants and external project coordinators” to assist with the IT integration.

If there is enough in-house IT integration resources, the IT Integration Teams are formed, through matching IT personnel skills, knowledge and experience in a STAFFING PLAN.

After this sub-activity, responsibilities can be assigned to the formed IT integration team(s). RESPONSIBILITY is assigned to the formed IT Integration Team(s). This to ensure that business customers are still supported during the IT integration.

With the information provided, the Project Team develops an ORIENTATION DOCUMENT, which outlines, who will do what, at which point during the IT integration.

## 5.6 Meta model of the analysis phase

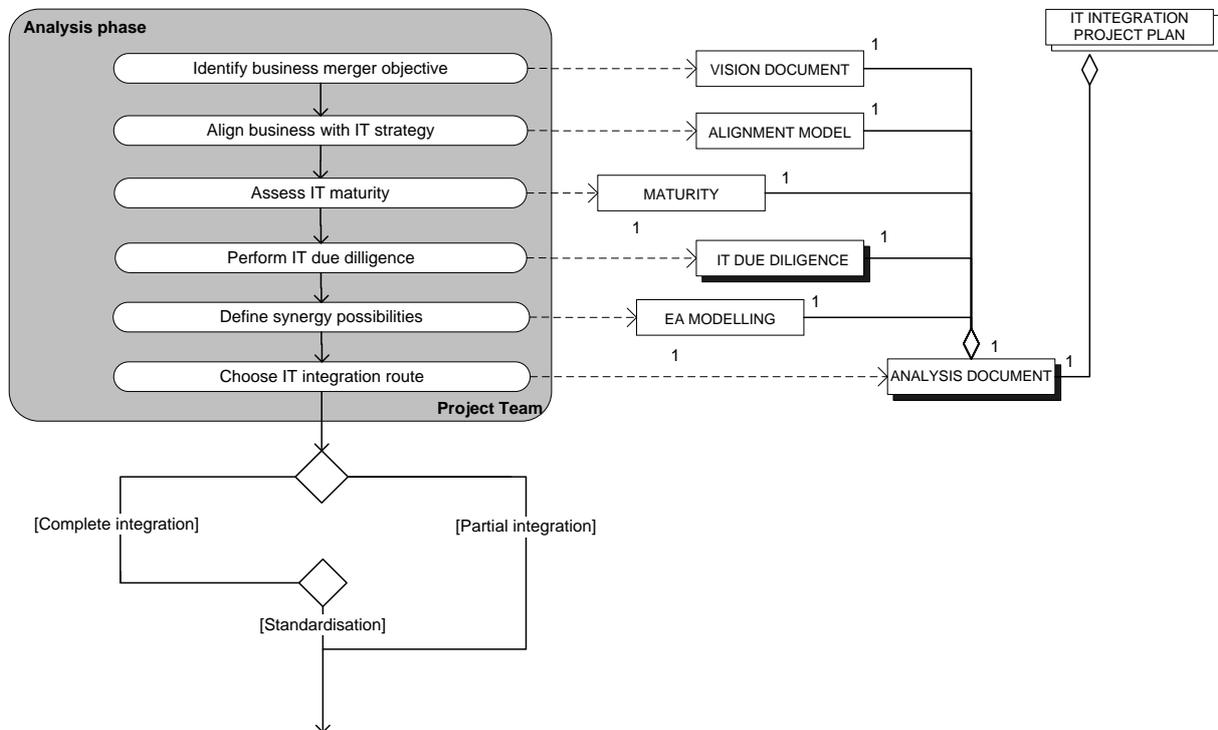


Figure 5.5: Analysis phase of the standardization route

The analysis phase starts with identifying the business merger objective. The Project Team identifies the business merger objective and forms a VISION DOCUMENT, to help set the direction and expectations for the IT integration.

After the VISION DOCUMENT is formed the business strategy of the project has to be aligned with that of the IT strategy. The Project Team aligns the business and IT strategy with the help of an ALIGNMENT MODEL.

To see, which of the two IT departments has a higher maturity level, the Project Team assesses the IT MATURITY of both IT departments.

To get an accurate measure of assets, the IT Integration Team performs an IT DUE DILLIGENCE.

To assess the synergy possibilities between the two IT departments the IT Integration Team can assess the synergy possibilities with the help of EA MODELLING

Finally the IT integration route must be defined. With the information provided by the sub-activities performed within the Analysis phase, the Project Team develops an ANALYSIS DOCUMENT to analyze, which route to take, within the IT integration roadmap.

## 5.7 Meta model of the IT process integration phase

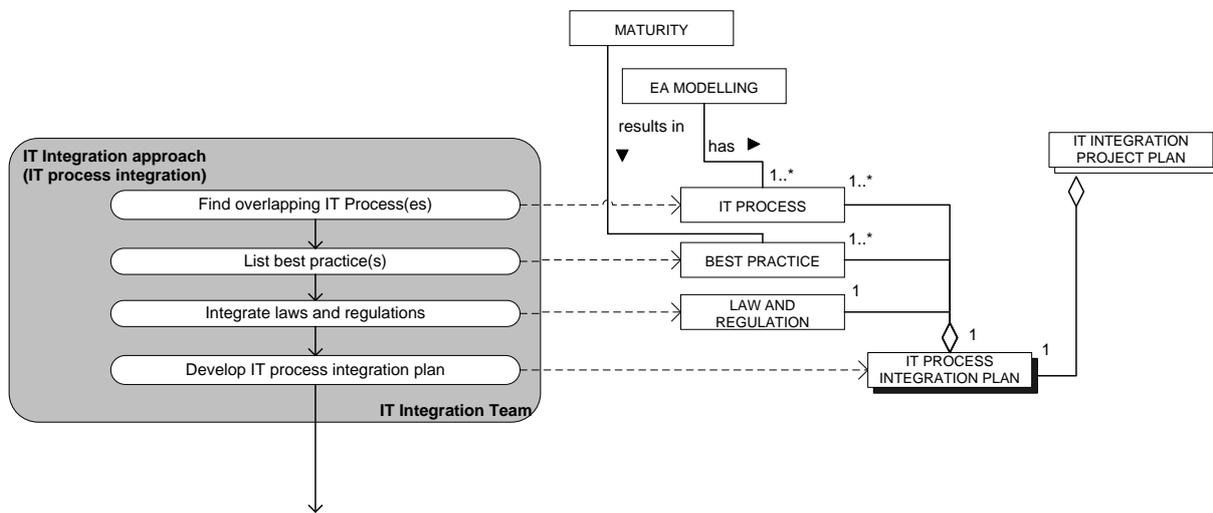


Figure 5.6: IT process integration phase of the standardization route

During the IT process integration phase, the first phase consist of finding overlapping IT processes. The IT Integration Team finds and lists each overlapping IT PROCESS. Since EA modeling lists all of the IT processes performed by the two IT departments, the input for the IT PROCESS product can be directly extracted from the EA models.

After the overlapping IT processes have been found, the IT Integration Team lists the BEST PRACTICE, for each overlapping IT PROCESS. The input for the BEST PRACTICE product can mainly be extracted from the MATURITY product.

Since the laws and regulations of both IT departments have to be valued, the IT Integration Team describe, which LAW AND REGULATION needs to be integrated and how to integrate them.

After all of the sub-activities within the IT process integration phase have been finished, the IT Integration Team defines how to integrate the BEST PRACTICES for each overlapping IT PROCESS with the information provided. The product leading out of this activity is the development of an IT PROCESS INTEGRATION PLAN.

## 5.8 Meta model of the IT systems integration phase

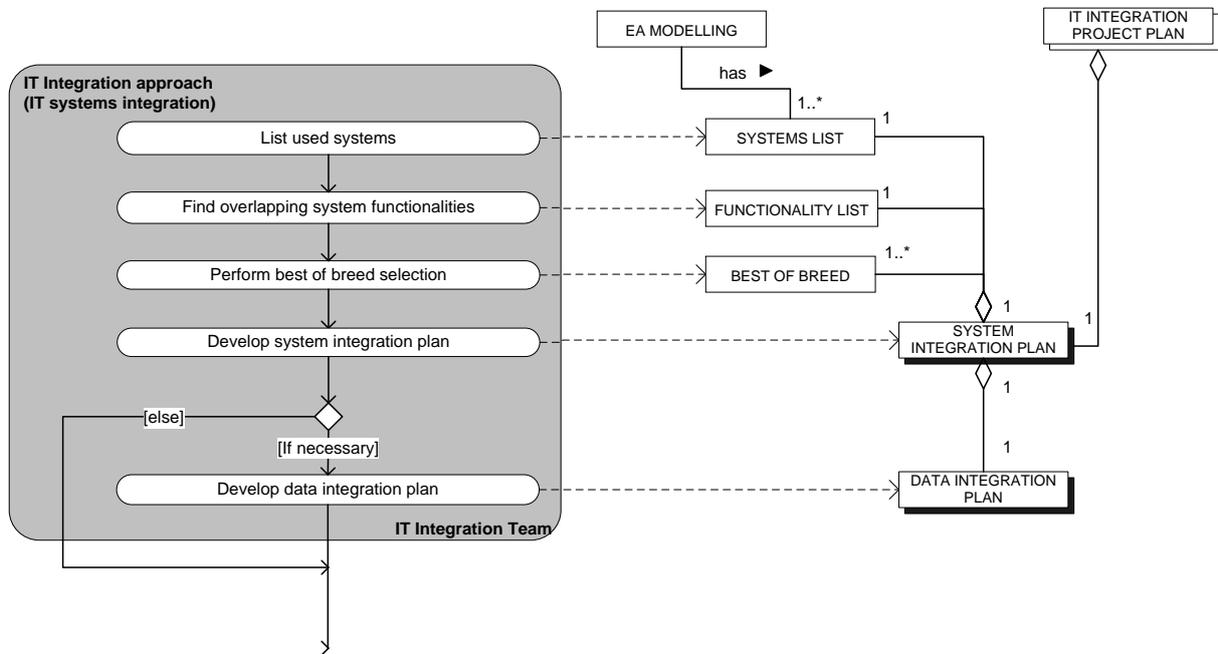


Figure 5.7: IT systems integration phase of the standardization route

Within the IT systems integration phase, the first sub activity is to list the used business and IT systems in a SYSTEMS LIST. The used systems can be extracted from the EA models created in the Analysis Phase.

After the used systems have been listed, the IT Integration Team finds and list the overlapping system functionalities in a FUNCTIONALITY LIST.

According to each overlapping system functionality, the IT Integration Team will then perform a BEST OF BREED system selection.

With the information provided, the IT Integration Team defines how to integrate each overlapping system and develops a SYSTEM INTEGRATION PLAN.

If necessary, the IT Integration Team defines how to integrate the data from the systems and develops a DATA INTEGRATION PLAN.

## 5.9 Meta model of the IT infrastructure integration phase

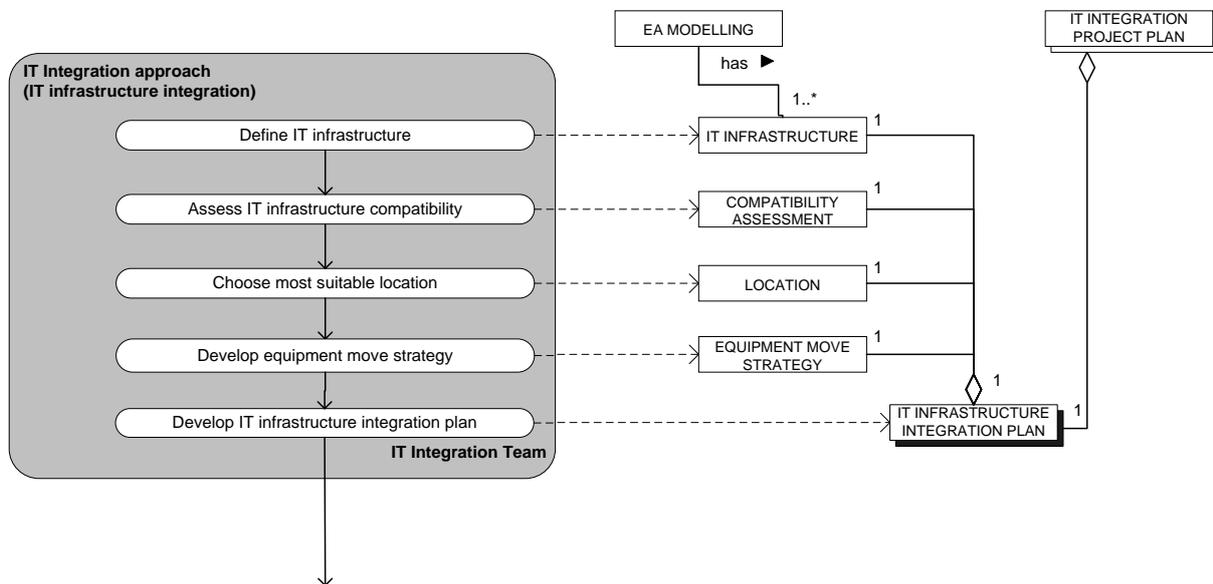


Figure 5.8: IT infrastructure integration phase of the standardization route

The first sub activity within the IT infrastructure integration phase is concerned with defining the IT infrastructure. The IT Integration Team defines the IT INFRASTRUCTURE of both IT departments. The data to define the IT infrastructure of both IT departments can mainly be extracted from the EA models developed during the Analysis Phase.

After the IT INFRASTRUCTURE of both IT departments had been defined, the IT Integration Team assesses the IT INFRASTRUCTURE compatibility of the two IT departments, with the help of a COMPATIBILITY ASSESSMENT.

After the COMPATIBILITY ASSESSMENT has been completed, the IT Integration Team chooses the most suitable LOCATION for the future integrated IT INFRASTRUCTURE.

Since the most suitable LOCATION has been chosen an equipment move strategy must be developed. The IT Integration Team develops an EQUIPMENT MOVE STRATEGY.

With the help of the products delivered in the IT infrastructure integration phase, the IT Integration Team defines how to integrate the best IT INFRASTRUCTURE parts and they develop an IT INFRASTRUCTURE INTEGRATION PLAN

## 5.10 Meta model of the IT personnel integration phase

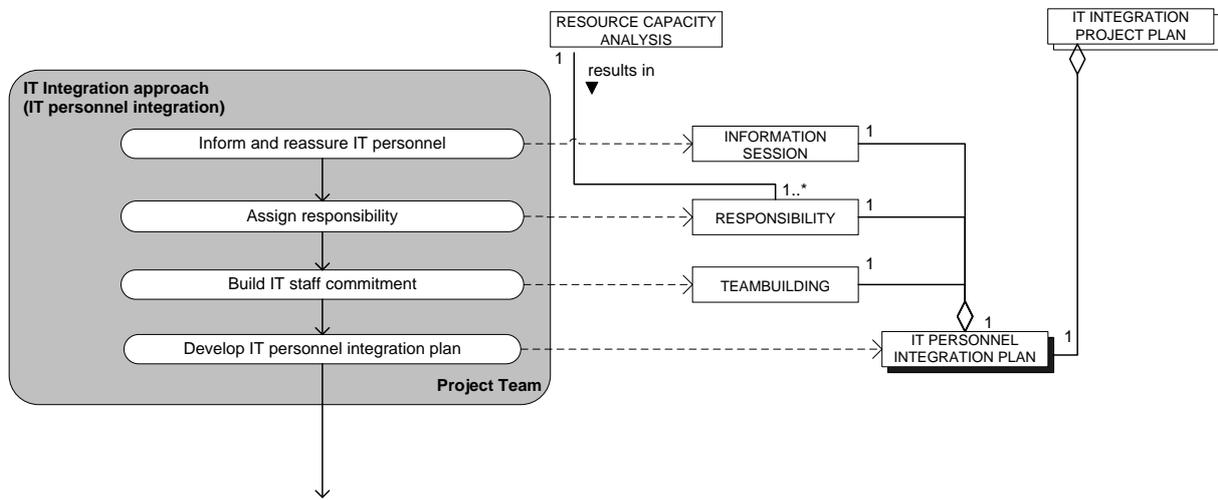


Figure 5.9: IT personnel integration phase of the standardization route

Within the IT personnel integration phase the first sub-activity is to inform and reassure the IT personnel. Therefore the Project Team designs an INFORMATION SESSION to inform and reassure the IT personnel.

After the IT personnel are informed their net responsibilities can be assigned. The Project Team defines the new positions and RESPONSIBILITY for the IT personnel of the newly formed IT department.

Since the IT personnel of the two IT departments usually do not know each other, the Project Team defines steps to build IT personnel commitment through TEAMBUILDING.

With the information provided by the sub-activities performed earlier in the IT personnel integration phase, the Project Team defines how to integrate the IT personnel of both IT departments and design an IT PERSONNEL INTEGRATION PLAN.

## 5.11 Meta model of the management phase

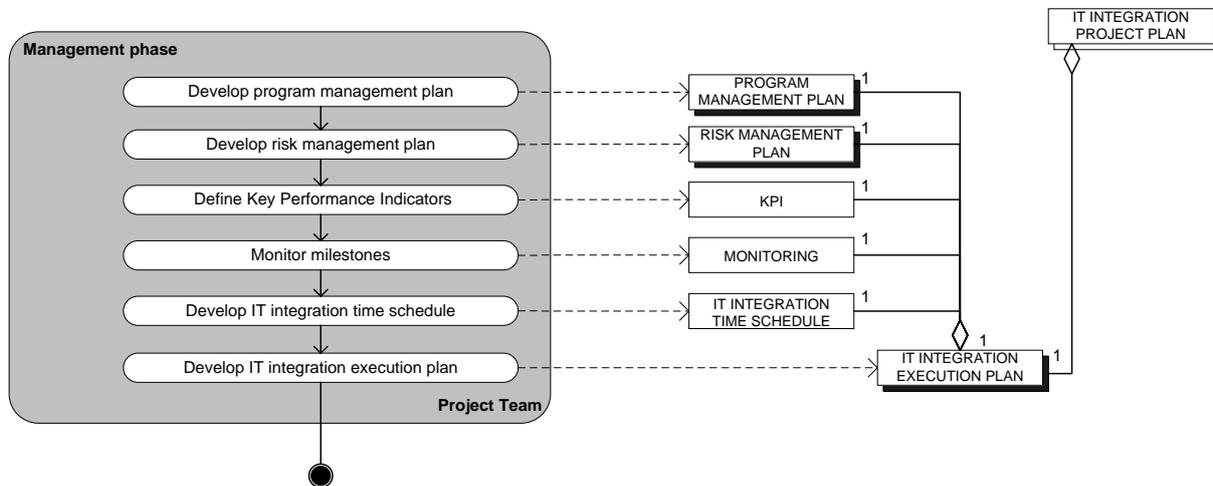


Figure 5.10: Management phase of the standardization route

The final activity of the post-merger IT integration roadmap is the Management Phase. The first sub-activity within this activity is to develop a program management plan. The Project Team defines what the program requirements are and develops a PROGRAM MANAGEMENT PLAN.

After this sub-activity, the Project Team defines what the risks of the project are and develops a RISK MANAGEMENT PLAN to minimize risk.

The Project Team must also define the Key Performance Indicators (KPI), which helps for the project to be successful.

After the KPI's have been defined, the Project Team defines how the MONITORING of milestones will be achieved.

Since the project has to be executed in an acceptable timeframe, the Project Team develops an IT INTEGRATION TIME SCHEDULE, for the execution of the IT integration roadmap.

Finally when all of the necessary products within the IT integration roadmap have been produced, the Project Team develops an IT INTEGRATION EXECUTION PLAN, to outline how to execute the IT integration roadmap.

All of the products delivered can then be placed in an IT INTEGRATION PROJECT PLAN, which will contain all the necessary steps to successfully execute the post-merger IT integration of the two IT departments.

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## 6 VALIDATION

The method was validated by expert validation and a case study at Rentokil Initial and Initial Hokatex. Due to scoping issues only the standardization route of the post-merger IT integration reference method was covered in this validation.

### 6.1 Expert validation

The reference method within this research project contains a combination of existing strategies/methods, to which some new elements are added. By doing this the constructed method already contains a high validation level. But since this way of validating only validates the individual parts of the method and not the method as a whole, the method is also validated by mean of interviews. The interviews were held at IT consultancy companies and with IT integration project managers and consultants. The Interviews that were taken with the experts can be found in Appendix 2.

The result of the expert validation was that there is indeed a need for a post-merger IT integration method. Mainly because of the extensiveness of the method and that it includes all of the IT integration projects phases. The summary of the interview answers can be found in Appendix 3.

The interviews held resulted in some interesting improvement points, such as:

- Combining and adding some sub-processes and products to fill the missing parts in the method such as personnel training and knowledge management.
- Adding more choice diamonds to make the method more applicable to different situations.
- The addition of a mounted planning system such as MS project. This way the managers and directors can easily use the method and keep track of their planning.
- Add processes and or products together to come to a shorter turnaround time.
- To create time savings, sub processes with the goal to create a collective document, should be left out of the method.

These points can be used to incrementally improve the post-merger IT integration method. Because of time issues only 7 interviews were held. By increasing the amount of expert interviews, more improvement points for future research can be discovered, thus increasing the validity of the method.

### 6.2 Case study

Since Rentokil Initial is one of the companies that is struggling with the IT integration process after a merger, the proposed project was thereby addressed by Rentokil Initial.

Figure 6.1 gives a quick overview of the steps which took place after and during their merger. This figure will be described in detail in the next section.

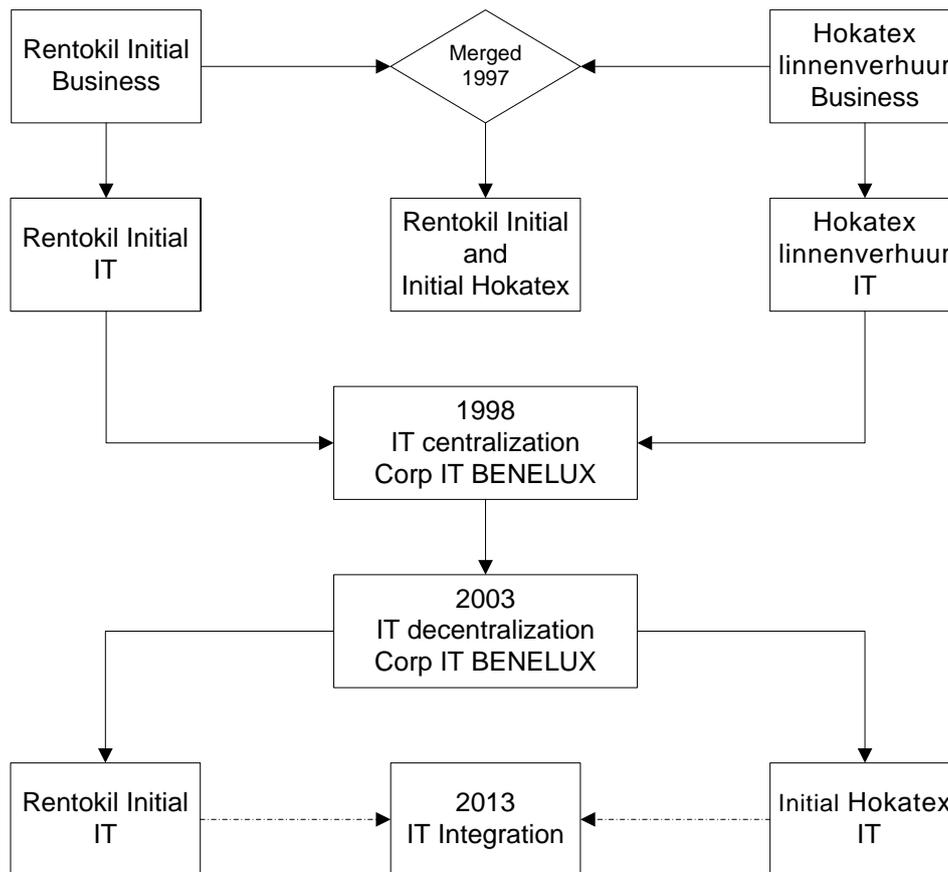


Figure 6.1: Time line of the Rentokil Hokatex merger

In the year 1997 Hokatex linnenverhuur B.V. (Hokatex) merges with the global player Rentokil Initial. This results in a change of name for Hokatex to Rentokil Hokatex. This merger helped Hokatex to become the main provider in the field of facility services. In 2002 Rentokil initial changes the names of various divisions, and thus also changing the name of Rentokil Hokatex to the current name Initial Hokatex.

The merger in 1997 caused an organizational restructuring and increased the IT costs due to the decentralized form of the IT divisions within the Benelux (Belgium, Netherlands, Luxemburg).

The CIO of Rentokil Initial (within the UK) decided to merge all the IT divisions of the separate business units (Initial Hokatex, Textile & Washroom services, Rentokil Initial, Hygiene, and so on) to one Corporate IT (corp. IT Benelux).

The corp. IT Benelux was managed by one IT manager, who was assigned by the CIO. The IT manager centralized all of the IT personnel to one location from where they supported the different business units. This took place at de Meern in Utrecht. He also created flexible work spaces in Belgium and Luxemburg. The IT manager centralized the IT Infrastructure at de Meern and divided the personnel into groups, so they could support every business unit in each country as good as possible.

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To create synergy he introduced one financial package among all business units, which is still being used today.

The IT support of the business units was very well organized and proved to be cost effective. Despite the success the line managers of the business units requested to have their own IT people for the support of their IT. They found that their IT was better supported by an on-site IT, populated by people they already knew. They felt that they could not affect the way the centralized IT unit was supporting their business processes. The line managers began to pressure the CIO until he was forced to decentralize the centralized IT unit to the way it was.

This is the main reason the corp. IT Benelux decentralized in 2003 after being centralized for over five years. The process of decentralization was not so tough, because Initial Hokatex went back to the exact IT support level they used before. Therefore the total decentralization process only took a couple of months. From that point on Initial Hokatex kept their own IT department completely separated from the IT department of Rentokil Initial.

Nowadays Rentokil Initial and Initial Hokatex have IT managers accountable for a specific country and there are no line managers responsible for the business units. Rentokil Initial and Initial Hokatex now want to integrate their IT and merge their IT departments. By doing this they want to achieve benefits by sharing the knowledge that resides within the IT departments. This decreases the reinvention of the wheel and avoids the costs associated with IT redundancy.

The possibilities of synergy will have to be assessed along with the centralization of the IT infrastructure. This time taking into account, all IT integration implications, which were missed the previous time IT centralization was announced.

### **6.2.1 Case study validation**

Within this section we will validate the post-merger IT integration method by executing the processes depicted within the first three phases of the method. These three phases are the initiation phase, the orientation phase and the analysis phase.

The steps taken to validate these three phases will now be described, to give insight in how these steps are executed in practice.

### **6.2.2 Initiation phase validation**

#### **Identify key project team members**

The Initiation phase is the first phase of the post-merger IT integration method. Within this phase there are several processes. These processes have to be executed, for the IT integration project to be a success and before one can skip to another phase within the IT integration method. The first process according to the IT integration method is to identify the key project team members and to establish a project team.

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Since the project was raised by the IT manager of Rentokil Initial (Jurriaan Aaftink), He and the IT manager of Initial Hokatex (Martijn Block), formed the project team.

### **Create decision making structure**

The second process in the IT integration method was to create a decision making structure i.e. the board. Since the main IT headquarters is located in the England and the project team could not turn to them for this project, we assigned the board to the IT director of Initial Hokatex (Kaveh Vahabi) and the financial director (Marco Scheepers) of Rentokil. They were willing to work along with the project of validating the developed IT integration method.

### **Compose IT business case**

The next process was to compose a business case for the IT integration project between Rentokil Initial and Initial Hokatex. The document was formed by taking interviews with the IT managers of Rentokil Initial and Initial Hokatex. The interviewer scheduled a meeting for both IT managers and composed the questions. Once the interview started it soon became clear that the two IT managers both had a different view on the IT integration and on the current way of working. The IT managers wanted to have their way of working to be the leading form within the merger. The interview was thereby quickly stopped and individual interviews with both IT managers were made. After the second attempt to interview the managers, but this time individually, the researcher gained allot of insight in what the current problems were and where both parties saw their benefits of integrating their IT environments.

The researcher than formed an IT business case with the benefits of both ITs combined. The IT managers then both got version of the Business case and returned feedback to the researcher. After the comments were all processed the IT business case of Rentokil Initial and Initial Hokatex was completed. The complete IT business case can be found in Appendix 5. The main founding was that:

“Rentokil Initial and Initial Hokatex want to integrate their IT and merge their IT departments. By doing this they want to achieve benefits by sharing the knowledge that resides within the IT departments. This decreases the reinvention of the wheel and avoids the costs associated with IT redundancy”  
(Jurriaan Aaftink – IT Manager Rentokil Initial)

This is caused, because the IT departments of Rentokil Initial and Initial Hokatex are currently at the limit of their resources. Because of the current way of working the IT departments cannot make use of the full potential of their resources. Because they are working completely separated from each other they are creating two separate reporting lines from the Netherlands to the corporate governance in the UK. This is inefficient and is the main cause for confusion and wrong decision making on the governance site. By increasing their maturity and changing their processes to a more standardized environment, problems can be solved much faster by using standardized documented methods.

Towards the business they want to improve the quality of their services and processes including their communication and response time. Because of the small amount of resources within the IT divisions, they are not able to increase their maturity and are constantly reinventing the wheel.

To solve the inefficient way of working and to resolve the problems that reside within the individual IT divisions, the IT managers want to integrate the two IT departments creating a centralized environment. Integration will increase the IT maturity of the IT department and will ensure an increased efficiency and effectiveness. Their vision is to provide IT support to the business using a shared service center (SSC), which will increase the efficiency and use of their available resources, so they can be deployed and divided in an accurate manner. Thus creating a flexible infrastructure, which allows for accommodation of change from the business.

The main advantages that the two IT departments want to gain with the IT integration project are:

- Creating an agile working environment
  - With an agile environment the Shared service center will have the possibility to increase their exchange of knowledge. This will improve their ability to react to requests for change from the business. An agile environment will mature the IT department and help improve the services and processes towards the business (Roehl et. al., 2008).
- Standardized IT processes
  - The IT processes can be standardized so problems can be solved much faster by using standardized documented methods. The knowledge that resides within the separate IT departments can be merged in a knowledge base. This can help gain more knowledge about solutions for problems. Currently the lack of operating procedures causes constant reinvention of the wheel (Berkman, 2001).
- Enhanced IT productivity
  - Working together and distributing the resources will increase the IT productivity. If the IT department can plan their resources better, they can also meet the requirements of the increasingly demanding business (Batelaan and van Essen, 2000).
- Reduced IT redundancy
  - There is a lot of IT redundancy between the two IT departments. Duplication often results in high costs. By assessing the synergy opportunities. The IT department can eliminate duplication by for example stop using excessive licenses and terminating the use of external services such as Telephone Lines and internet connections (Batelaan and van Essen, 2000).
- Improved workflow and communication
  - If the IT departments will be centralized the information sharing will be increased. This will improve the workflow because the IT members can share their knowledge much easier (Berman, 2001).

- **Creating Service Level Agreements (SLA's)**
  - SLA's should be created in order to guarantee agreements between the seller and buyer of IT services or products (ITIL, 2004).
  
- **Improving the reporting lines towards the corporate governance**
  - Having multiple reporting lines, creates two separate lines from the Netherlands to the corporate governance in the UK. This is inefficient and is the main cause for confusion and wrong decision making on the governance site.

### **Review IT business case**

At last we asked the board to review the IT business case and to provide us with an agreement document. The agreement of the IT business case was given to us verbally. This gave the project a good start, since we now could start with the next phase of the post-merger IT integration method namely the orientation phase.

### **6.2.3 Orientation phase validation**

#### **Assess need for third party support**

After the IT business case was approved by all parties we performed the steps within the orientation phase. We performed a resource capacity analysis, which can be found in Appendix 6. This to determine the availability of existing resources and to assess the need for third party support (outsourcing). To get a clear understanding of the capabilities and know-how among the IT members of both IT departments, the researcher performed a resource capacity analysis. The IT members where all interviewed on their tasks within the IT department. The table depicted in Appendix 6, shows the IT Team members capabilities and know-how. On the top the names of the IT members is shown and on the left side of the table the functions are stated, which are performed within the IT departments. Each cross within the table shows, which IT member possesses the knowledge on the depicted subject. The main founding within the table shows that:

“There is enough in-house knowledge on all subjects, to execute an IT integration project.”

(Martijn Block- IT Manager Initial Hokatex)

Mainly because most of the IT members already have been through an IT integration process earlier in their career and therefore know what steps there are and what changes there will be. The hiring of third-party personnel is therefore not necessary.

#### **Form IT integration teams/ assign responsibility to teams**

The next process within the orientation phase is to form IT integration teams. For this process a staffing plan was developed. Since all of the capabilities and know how where already discovered in the last process, the researchers used this information to group the IT members for both IT departments with the same capabilities and know how. By doing this the project team gets a clear view of how to assign responsibilities to the different IT integration teams.

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### **Develop orientation document**

The IT members and their future IT integration responsibilities were placed in the orientation document, which contained all the necessary information for the board. The board now also has an overview of the in-house knowledge and all of the related capabilities of the IT members of both IT departments.

### **6.2.4 Analysis phase validation**

#### **Identify business merger objective**

Within the analysis phase the first process is to identify the business merger objective. The project team identifies the business merger objective and form a vision document, to help set the direction and expectations for the IT integration. The vision, which came forward out of the interviews taken with the IT managers is that:

“Rentokil Initial acquired another business related in the areas of markets, products or technology.”

Also called a concentric diversification by Mehta and Hirschheim (2004).

#### **Align business with IT strategy**

After the vision document was formed, the business strategy of the project has to be aligned with that of the IT strategy. The IT strategy of Rentokil Initial and Hokatex Initial is that they want to provide IT support to the business using a shared service center (SSC), which will increase the efficiency and use of their available resources, so they can be deployed and divided in an accurate manner. Thus creating a flexible infrastructure, which allows for accommodation of change from the business.

“The merger objective on the business side of the companies therefore is symbioses.”

After this process the project team aligned the business and IT strategy with the help of an alignment model. Within this project we used the method of Wijnhoven et. al. (2006), to align the business merger objective with the IT strategy.

The merger objective on the business side of the companies is symbioses. Wijnhoven et. al., describes that:

“The most appropriate IT integration objective is partial IT integration.”

He describes that this is the IT integration objective, which corresponds to the aimed level of business integration. Since partial integration is possible the IT integration method, which belongs to this IT integration objective according to Wijnhoven et. al., is standardization. They also described standardization as the combination of the best parts of both IT departments as the new standard for the merged companies.

## Assess IT maturity

Although the business and IT strategies are aligned, the next process should be performed to get an assessment of the maturity of the two IT departments. This should be done to see, which of the two IT departments has a higher maturity level. To assess the IT maturity, interviews were held at both IT departments.

The assessment was taken with the help of an ITIL IT Service Capability Maturity Model (ITSCMM) questionnaire. The ITSCMM rates the level of maturity within the IT departments. Interviews were held with both the IT departments, to discover how they perform their IT service management processes and if they do it on an initial, repeatable, defined, managed or optimizing maturity level. The different levels of the ITSCMM are described below and are based on the research of Niessink et. al. (2005). The ITSCMM levels are as follows:

- **Level 1. (Initial level)**
  - The IT service processes are characterized as ad hoc, and chaotic. Few processes are defined, and success depends on individual effort and heroics.
- **Level 2. (Repeatable level)**
  - Basic service management processes are established. The necessary discipline is in place to repeat earlier successes on similar services with similar service levels.
- **Level 3. (Defined level)**
  - The IT service processes are documented, standardized, and integrated into standard organization-wide service processes.
- **Level 4. (Managed level)**
  - The organization gains quantitative insight into their service processes and service quality. By using detailed measurements of the IT service delivery process and service quality. Within this level, Service Level Agreements (SLA) can be composed.
- **Level 5. (Optimizing level)**
  - The entire organization is focused on continuous process and service improvement, by quantitative feedback from the processes and from piloting innovative ideas and technologies. Using the quantitative measurements the organization prevents problems from recurring by changing the processes.

As described earlier both IT departments want to improve their IT services by integrating their IT departments. This will reduce their IT redundancy and will enable them to gain more knowledge by documenting, standardizing, and integrating IT services into standard organization-wide processes. By comparing the maturity levels of the IT departments, a clear indication can be made, of which IT department performs on a higher maturity level.

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The differences between the two IT departments can then be made clear and a brief improvement consult can be given on the different IT services. In the end the assessment mentioned above will give a good indication, of which IT department will be able to perform a leading role throughout the integration.

To get an indication of the level, on which the IT departments perform their services. The two elements within the service management part of ITIL were assessed. These elements are the “service support” and the “service delivery”. These were assessed to get an indication of the service management maturity. In general determining the IT maturity level requires that all of the ITIL processes must be met. The IT departments of Rentokil and Hokatex do not follow the ITIL processes, but make use of similar processes. Thus it must be kept in mind that an actual maturity assessment needs all the ITIL processes to be performed. The maturity level that will follow out of this assessment is only an indication of the maturity level, on which the IT departments reside.

For assessing the IT maturity of Rentokil Initial and Initial Hokatex we used the ITSCMM questionnaire of Niessink et. al. (2005). This involved an exhaustive interview with both IT departments. Summarizing the IT service delivery assessment concludes that both IT departments perform on IT maturity level 2 concerning the IT service support processes. The assessment showed that:

“The IT department of Rentokil Initial performs their service level management process, in a more managed way than Initial Hokatex.”  
(Jurriaan Aaftink – IT manager Rentokil Initial)

“Hokatex on the other hand showed to handle the capacity management, availability/ security management processes on a more managed way than Rentokil.”  
(Martijn Block – IT manager Initial Hokatex)

This since Hokatex has a data center available, which proves it advantages in all three processes. Both IT departments reside on maturity level 2 concerning their service delivery management processes.

This assessment also gives a hint, which describes that, the overall IT maturity can be improved, if both IT departments should combine their advantages. This since the IT department of Rentokil manages their service management processes on a more managed way and the IT department of Hokatex is more managed on the IT infrastructure side. Concluding the ITSCMM assessment showed, that:

“The standardization route is the best route to take within the post-merger IT integration method.”  
(Jurriaan Aaftink and Martijn Block – IT managers)

By taking the standardization route, a best-of-breed selection will be performed to select the best parts of the IT environment i.e.: IT processes, IT applications and the IT infrastructure.

To confirm this, an extensive due diligence should be performed. But because a due diligence is a time consuming and long process we left this part out of our case study and went straight to defining the synergy possibilities between the two IT departments. The complete IT maturity assessment can be found in Appendix 7.

### **Define synergy possibilities**

The next process is defining the synergy possibilities between the two IT departments. To define the synergy possibilities we used the Enterprise Architecture Modeling (EAM) method. This technique was used because the researcher was known with the method. The main importance of enterprise architecture modeling lies in its holistic approach of all facets of the enterprise. EAM is not restricted to just the IT or just the business related issues, like business processes or business excellence, but it takes into account, all fundamental aspects of the enterprise, as long as they are related to the functioning of the enterprise (Foortshuis and Brinkkemper, 2007).

Our main goal with enterprise architecture is to ease decision making on the level of the board, to give insight in consequences of decisions and to set guidelines/ directions for the lower levels. The enterprise architecture model consists of the supply chain diagram, the enterprise function diagram at corporate and functional level, an application overlay diagram and an IT infrastructure diagram. The aim of the enterprise architecture model is to give an overview of the enterprise architecture of both IT departments.

Both the business side as the IT side of both organizations was modeled with the help of EAM. The EAM of both businesses and IT departments of Rentokil Initial and Initial Hokatex are shown in Appendix 8. These models were constructed by interviewing the IT members and the IT managers. The enterprise models produced of the two IT departments were first compared to each other. The comparison will show, which processes, applications and infrastructure parts are redundant, between the two IT departments. The complete defining of the synergy possibilities can be found in Appendix 8.5. By doing this the board will have the right information presented to them, in an eligible way. With this information they can get insight in the consequences of an IT integration, on the business functions. The consequences are high, since IT nowadays has the highest number of dependency on other business functions (PWC, 2009).

The business functions, which are similar but don't contribute to the strategic purpose of the merger can be combined. The functions that could be combined in the future, according to the enterprise function diagrams are: Financial management and Human resources (HRM). Since these business functions are similar between both companies. The rest of the business functions are core services of production and delivery and should be kept apart.

The application overlay diagrams showed that:

“Both companies make use of a lot of different applications to support their business functions.”

The financial management departments of Rentokil Initial and Initial Hokatex both use FIS2000 as their financial package. Unlike the HRM departments of the companies, which use different applications for their HRM processes. Therefore for the HRM department a consideration should be made by the top management whether to combine the two departments or not.

The application overlays also show that there are a lot of interfaces between the different applications within the companies. This makes the merging of the business functions even harder since most of these applications are business critical and may not be affected by downtime. Because of this and the fact that most of the business functions are of a strategic purpose, not much integration is possible on the business side of the companies. Since the EAM models showed that:

“synergy can be realized in some business functions”

The IT integration strategy has to be formed to fit this new strategy. The IT infrastructure of the applications that go with the comparable business functions should also be adjusted.

The IT departments support the applications used by the business processes. They do this with the help of their IT employees and their suppliers. Since standardization is often realized by a best-of-breed selection procedure (Wijnhoven et. al. 2006), the best supplier for each service should be assessed. On IT process level the EFD diagrams of the two IT departments, show that:

“The IT processes within the IT departments are very much alike.

This is fortunate for the IT integration, since the IT integration method “standardization” only integrates similar IT functions. The functions/ processes, which appear to be similar are the: financial management process, service desk processes, knowledge management processes and security management. The third line support of Rentokil Initial is identical to the support network services (SNS) process of Initial Hokatex and deals with the same tasks. The one and only process, which differs from the process of Rentokil Initial is the application support group (ASG) of Initial Hokatex.

On IT application level the IT departments use several applications to support the IT processes of Rentokil Initial and Initial Hokatex. The presented application overlays (AO) shown in Appendixes 8.2 and Appendix 8.4, shows the applications used by both IT departments.

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Both IT departments have the exact same sub processes, these are the: First/ second line support, Incident management and Configuration Management. The service desk of Rentokil uses Topdesk for their service desk processes. Hokatex on the other hand uses Clientele as their IT service management system. Sins the maturity assessment performed in deliverable 2, showed that:

“Rentokil performs their configuration management and change management processes in a more managed way than Hokatex, the IT department of Rentokil should have the leading role for this IT process.”

The assessment also showed that Rentokil uses Topdesk more actively sins they have registered all IT components within the configuration management utility of Topdesk. The above ensures that Rentokil will be able to increase the maturity of a newly formed IT unit, by applying their best practices and by using Topdesk as the standardized IT service management system for the newly formed IT unit.

Despite of the two different names the Third line support of Rentokil and the SNS of Hokatex perform the same sub processes. The sub processes performed within this IT process are: Network support, Capacity management and Monitoring. The Network support and Capacity management processes of both IT departments, is covered by the corresponding functionalities of their IT service management system. The maturity assessment showed that the maturity of the two IT departments is the same for these two IT sub processes. Since Topdesk was chosen as the overall IT service management system for the newly formed IT unit in the previous section, the most logical choice would be to also use Topdesk for the Network support and the Capacity management processes.

For monitoring the IT network components Hokatex uses Opmanager and Rentokil uses SolarWinds. The choice between these systems is one of a higher grade sins it is made by the top management in the UK. They want to use Solarwinds as the standardized monitoring software for their company. Therefore Solarwinds should be used as the standardized monitoring system for the newly formed IT unit.

The maturity assessment (deliverable 2) showed that Hokatex possess the best practices concerning the Third line support and Network related services. This states that Hokatex should have the leading role when it comes to these processes. In conclusion the best-of-breed approach would be, to use the networking experience and knowledge of Hokatex and the monitoring system of Rentokil.

For the knowledge management process the IT departments are using their IT service management system. Both IT departments use their IT service management systems, knowledge management function.

They do this by documenting the solutions of solved problems in their knowledge base. This should be transformed to one uniform system containing all necessary data from both systems

For the security management process, the IT department of Hokatex proved that their way of working, is the best way of increasing the IT maturity. This because Hokatex established, a fully functioning virtual back office (data center). With the help of their virtual data center they can easily adapt to the changes from the business. This is the main reason why Hokatex should have the leading role when it comes to security/availability management. The data storage and recovery system that Hokatex uses for their back-up procedure is Commvault, in contrast to Rentokil, which uses Back-up-exec. The Hokatex way of controlling the data storage and recovery process, is far more superior to that of Rentokil. Rentokil therefore should adapt to the way of working of Initial Hokatex within the newly formed IT unit and should therefore also use Commvault.

The ASG makes use of the Clientele software, to retrieve the RFC tickets made by the employees. Sins the newly formed IT unit will make use of the Topdesk IT service management system, the ASG will also be addressed to use Topdesk for their processes.

For the IT infrastructure processes, the different business applications of Rentokil are stored at multiple locations, unlike the business applications of Hokatex, which are stored centrally. The IT applications however, are stored centrally at both IT departments. Initial Hokatex still has the upper hand when it comes to the IT infrastructure. This since all of their business/IT applications and IT components (such as firewalls, switches, and servers) are redundant at their data center. The advice to both parties for the newly formed IT unit would be, to centralize all of their business/IT servers to a single location from where the shared IT services can be performed best. Next to this, all of their business/IT applications and IT components should be made redundant, with the help of VMware machines installed at the data center of Initial Hokatex. Before this can be achieved a comprehensive relocation strategy must be mapped.

At last the IT personnel must be reorganized, to fit the newly formed IT unit. One advantage of the integration can be, to eliminate the possibility of a knowledge gap at Hokatex, which was described in deliverable 2. To solve the possibility of knowledge gaps, the proposed IT integration will prove its advantages by sharing the knowledge among the other IT members.

### **Choose IT integration route**

Finally the IT integration route must be defined. With the information provided by the sub-activities performed within the analysis phase, the project team developed an analysis document to analyze, which route to take, within the IT integration roadmap.

All assessments pointed out towards an partial IT integration. And thus:

“The standardization route within the post-merger IT integration method should be followed for a successful IT integration.”

This is how far we went with the validation of the standardization route within the post-merger IT integration method. The validation showed that the processes in each phase delivered the required products. And that an organization willing to integrate their IT with that of their merging partner, can use the first three phases to discover their IT integration route within the method. To validate the whole method with the use of a case study is an exhaustive task. This should be executed by people with knowledge of IT integration processes. By doing this it should lead to a fast and effective validation of the post-merger IT integration method.

### 6.3 Reliability and validity

In this section the reliability and validity of the used research methods will be examined.

#### 6.3.1 Reliability

Hart et. al. (2007), describe reliability as the extent, to which multiple measurements show the same results. If the measurements show the same results, than this in turn means that the measurements and the research are reliable. To provide insight in the degree of Reliability used within this project, there are several indicators used to make this concept measurable. These indicators are described by Hart et. al. (2007) as:

- The extend of repeating the measurements;
- Was the research performed under normal everyday conditions;
- Did the researchers make use of different data collection methods?

When a measurement is repeated multiple times all the better will the results provide insight into the reliability. Hart et. al. (2007), described that whenever measurements show the same results, it can be concluded that the results are reliable. Within this research the repeated measurement is reflected on the theoretical part and no so much on that of the practical part. The outcome of the theoretical part is the post-merger IT integration method, which was formed by an extended literature review on IT integration during mergers and acquisitions. The literature study was performed using the saturation method, which means that the related topics were researched to such an extent, that there was no new information to gain. The practical measurement was performed in the form of a case study at Rentokil Initial.

Since the method was only validated at Rentokil initial, future research should perform repeated practical validation of the method to assure the reliability of the post-merger IT integration method.

The second measurement described by Hart et. al. (2007) is if the measurement was performed under normal everyday condition. When a research is conducted under everyday conditions, the actual situation of the problem at hand can be examined.

By doing this a more reliable view of reality can be obtained, since direct insight into the research material is being provided. This research was not conducted under everyday conditions, because the data mainly came from literature research.

To ensure the reliability the developed IT integration method was validated by means of interviews with experts, directly involved in the decision making on the IT integration process during a merger and acquisition. Next to this the method was also validated under normal everyday conditions at Rentokil Initial with the help of a case study.

The last measurement for reliability is, if different kinds of data collection methods were used within the research. By doing this, the reliability of the research increases, because the same material is examined in different ways. Within this research, the researchers made use of literature study to gain the required data. The post/merger IT integration method, which was developed by means of literature study is based on a large number of sources depicted in table 4.1. Since the method was constructed with the help of validated method fragments, the developed IT integration method already contain a high validation level.

### 6.3.2 internal validity

Internal validity is described by Hart et. al. (2007), as the extent, to which the research findings correspond with the situations found in practice. They describe that the more a research reflects a real situation, the higher the internal validity will be.

One of the key factors in analyzing whether the research data corresponds to a practice situation is to identify whether there were multiple data collection methods used and whether they provided similar results independently (Hart et. al., 2007).

In this case, there was only one method used for data collection mainly the extended literature review. As described earlier, the internal validity of the data collection method is good, regardless of the use of only literature study, because the literature was obtained from many sources, which all had different angles.

The internal validity of the practical part is evaluated on the basis of the case study, which was performed at Rentokil Initial. Since the problem of IT integration after a merger was experienced from within the merging companies, the internal validity of the overall practical results increased.

### 6.3.3 External validity

External validity according to Hart et. al. (2007) is determined by the extent, to which the research is applicable to other areas of research. They describe that a research is valid externally when the results of a research object can be applied to a different research object within another research area. Boeije (2005) described that a research is applicable to other research areas, if the compared research areas correspond with each other, and show similar characteristics.

The developed post-merger IT integration method has been validated by means of expert interviews. Due to time issues only 7 expert interviews were held to validate the method.



To reach external validity, the interviews were held at several companies in the IT consultancy business, these companies could give a real live validation of the functionality of the developed IT integration method.

To get a high external validity the developed method should be validated by more expert interviews and should be improved. By doing this the method will become externally valid for companies who are willing to integrate their IT department with that of their merging partner.

The results are not valid externally, for business with little to no IT environment, because these companies have a different way of working.

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## 7 CONCLUSION

In this chapter the results from this research product are described. The main question in this research was:

*“How can a reference method for the successful integration of IT within the post-merger process between organizations be developed and validated?”*

The research question has been answered with the development of the post-merger IT integration reference method. The ways to validate the method in practice have also been shown and executed.

### 7.1 Contributions

This research also lead to various contributions namely theory generalization to the field of post-merger IT integration a contribute to the overall body of knowledge of IT integration. A detailed description is given in the next section.

#### 7.1.1 Theory generalization study

With the recession in mind allot of companies are merging with other organizations. During this process IT integration is often left behind. Batelaan and van Essen (2000) state that: “IT integration often proves unsuccessful during a merger” and that the cause of this low success mainly lies in the lack of understanding towards the concrete steps contained within the post-merger integration process. To decrease the underestimation and increase the awareness of the different steps that the post-merger IT integration process contains and since Mehta and Hirschheim (2004) describe that: “there is very little literature available, which directly defines the post-merger IT integration process”.

This research project therefore contribute to the development of a roadmap containing steps for the successful execution of the post-merger IT integration process. To do this a reference method was developed, which combined existing method and strategy fragments with some new elements from different domains. The reference method can be used as a roadmap by any company willing to integrate their IT with that of their merging partner. By doing this, this research project contributed to the overall body of knowledge of IT integration.

#### 7.1.2 Post-merger IT integration method

As stated earlier Batelaan and Van Essen described that: “IT integration often proves unsuccessful during a merger” and that the cause of this low success mainly lies in the lack of understanding towards the concrete steps contained within the post-merger integration process.

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To solve this problem Roehl et. al. (2008) described that: “an effective IT integration roadmap is a critical enabler of an effective merger integration and should be viewed by the IT organization as a reusable tool to be improved with every transaction”.

With the completion of this research, organizations willing to integrate their IT with that of their merging partner or are willing to integrate their internal IT divisions, have an action plan in the form of a roadmap for the overall IT integration. The roadmap outlines precisely, how to proceed through the IT integration process.

## 7.2 Discussions and future research

The results of this research were very promising but there are some things to keep in mind. First of all that there are some limitations when using the method. A company willing to use the method should take in account constraints such as:

- Members of both IT departments should participate actively and have to be willing to communicate openly.
- Keeping the organization operational during the integration process, and to avoid uncertainty and insecurity among employees and customers. This requires the integration of mission-critical and strategic systems first.
- IT-projects that are conditional to the integration must be working well already.
- The IT integration requires a decent budget, time frame, and IT policy.

These constraints and conditions are extracted from Wijnhoven et. al. (2006), Epstein (2005) and Roehl et. al. (2008).

It should be taken into account that no method fits all, the method was constructed with the help of CSF's and best practices. There will definitely be other processes and activities, which could be implemented in future research. Future research could improve the method by also taking into account, success factors, which have been found through practical research.

Since Batelaan and Van Essen (2000) state that there is no single method to assess synergy, we used the EAM technique of Foorthuis and Brinkkemper (2007) to assess the synergy possibilities between the two IT departments of Rentokil Initial and Initial Hokatex. This resulted in a great success in this case. Future research could find out, if EAM can be used as a permanent method in assessing synergy.

Finally only the standardization route of the post-merger IT integration method was validated. The validation was done by expert interview and a case study. One single case study can never be enough to have an overall validation of the method. The case study performed only validated the first 3 phases of the method. For future research we would suggest to validate the whole post-merger IT integration reference method and all of its routes, since we only got to validate the standardization route of the method.



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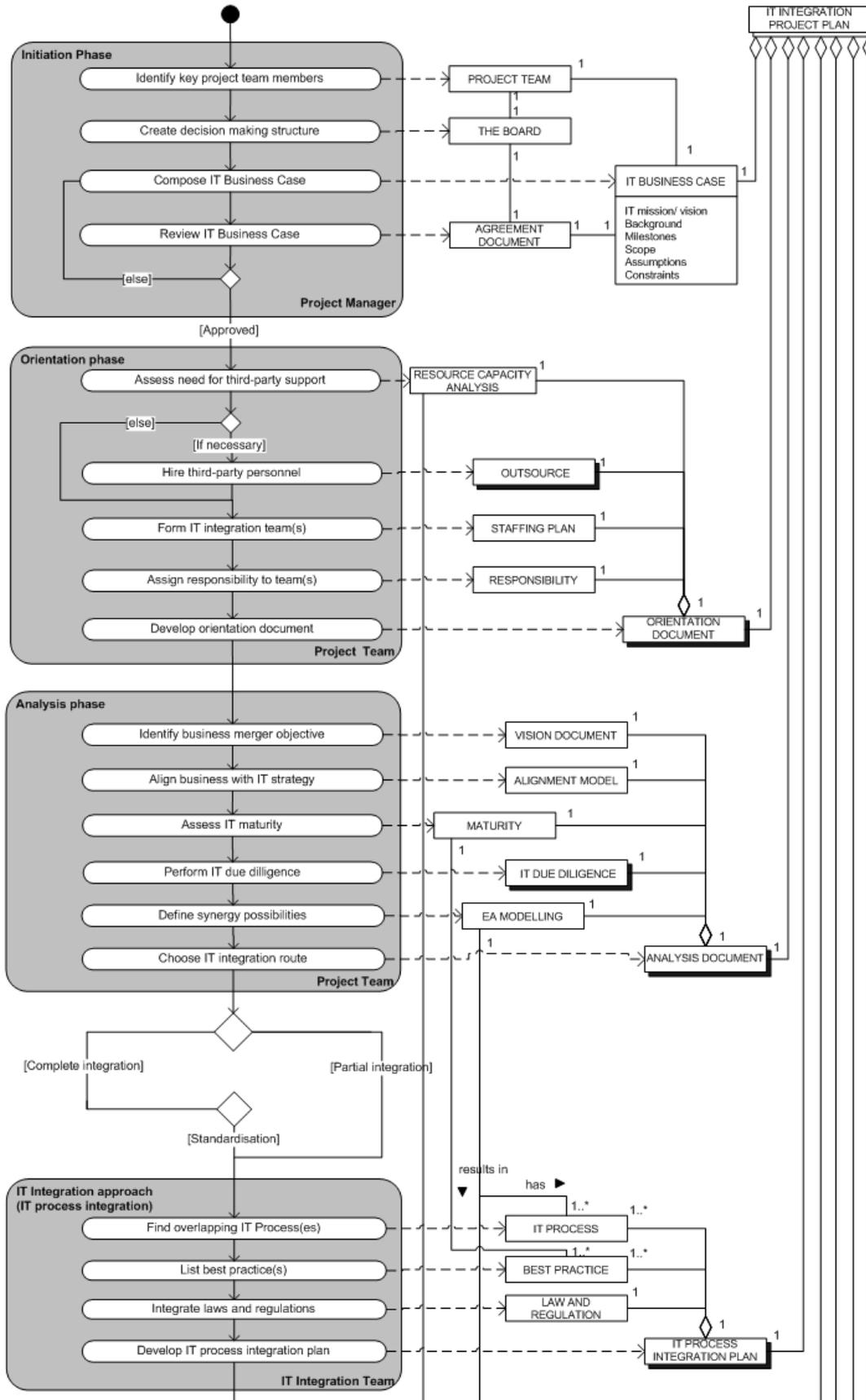
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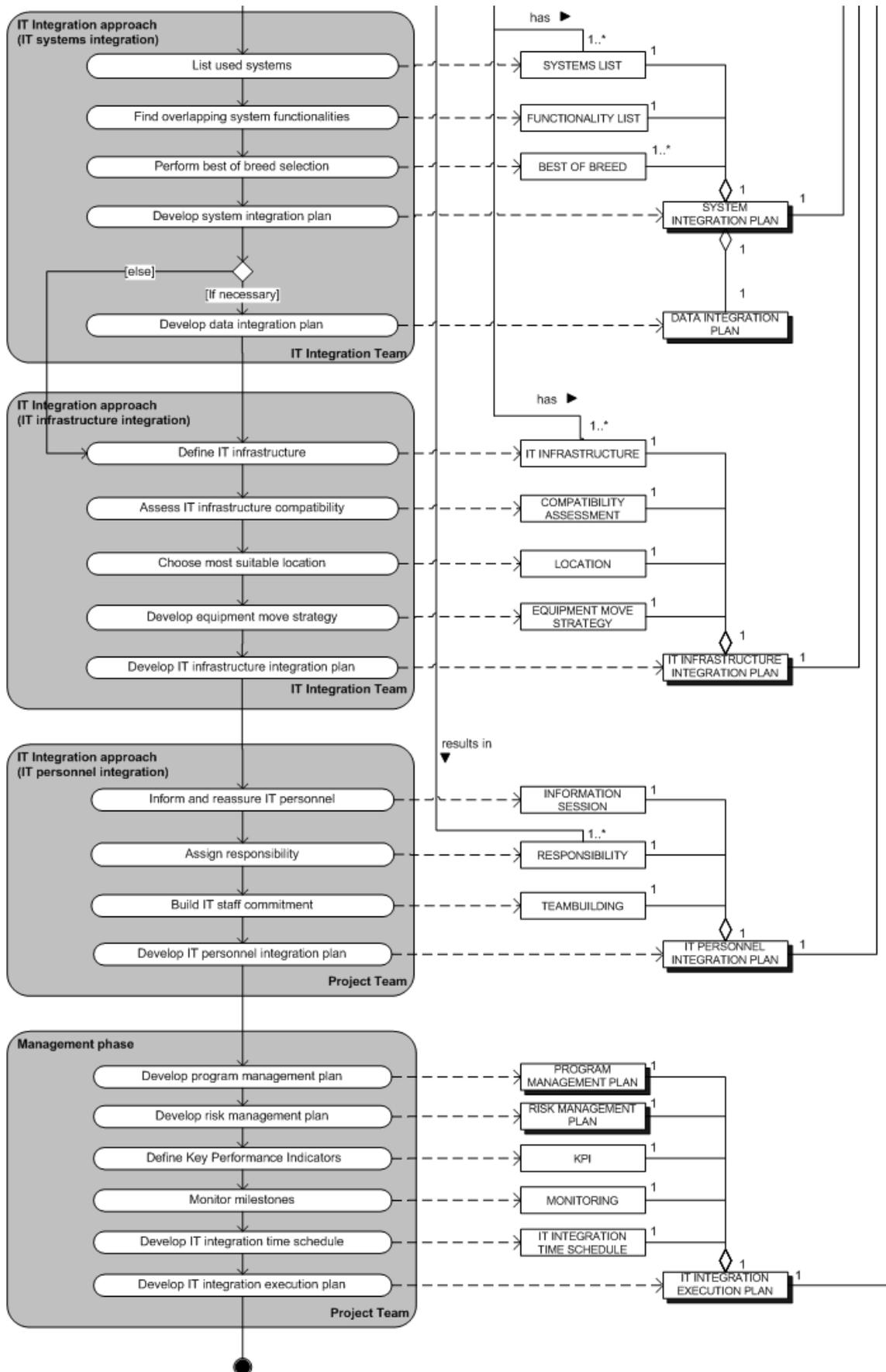


## APPENDIXES

# APPENDIXES

## Appendix 1: Standardization route of post-merger IT integration method





## Appendix 2: Description of the post-merger IT integration method

### Activities and sub-activities in the initiation phase

Activity	Sub-Activity	Description
<b>Initiation phase</b>	Identify key project team members	The Project Manager identifies the key team members, to form a PROJECT TEAM. These usually are the IT managers of the two IT departments.
	Create decision making structure	The Project Manager establishes THE BOARD, which can solve difficult decisions, driving the integration of business operations, without holding the integration back. These consist of the CIO's and IT directors.
	Compose IT Business Case	The Project Team compose a completely defined IT BUSINESS CASE.
	Review IT Business Case	THE BOARD reviews the IT BUSINESS CASE. Either they approve it with an AGREEMENT DOCUMENT, in which case the IT roadmap continues, or they disapprove it, in which case the Project Team rewrite the IT BUSINESS CASE.

### Activities and sub-activities in the orientation phase

Activity	Sub-Activity	Description
<b>Orientation phase</b>	Assess need for third-party support	If the IT BUSINESS CASE is approved, the Project Team completes a RESOURCE CAPACITY ANALYSIS. This to determine the availability of existing resources and to assess the need for third-party support, needed to form and execute the IT integration roadmap.
	Hire third-party personnel	If the Internal IT personnel do not possess the required know-how to execute the IT integration, the Project Team will have to OUTSOURCE integration tasks. The Project Team will hire third-party personnel "such as technical consultants and external project coordinators" to assist with the IT integration.
	Form IT integration team(s)	If there are enough in-house IT integration resources, the IT Integration Teams are formed, through matching IT personnel skills, knowledge and experience in a STAFFING PLAN.
	Assign responsibility to team(s)	RESPONSIBILITY is assigned to the formed IT Integration Team(s). This to ensure that business customers are still supported during the IT integration.
	Develop orientation document	With the information provided, the Project Team develops an ORIENTATION DOCUMENT, which outlines, who will do what, at which point during the IT integration.

## Activities and sub-activities in the analysis phase

Activity	Sub-Activity	Description
<b>Analysis phase</b>	Identify business merger objective	The Project Team identify the business merger objective and forms a VISION DOCUMENT, to help set the direction and expectations for the IT integration.
	Align business with IT strategy	The Project Team align the business and IT strategy with an ALIGNMENT MODEL.
	Assess IT maturity	The Project Team assess the IT MATURITY of both IT departments.
	Perform IT Due Diligence	The IT Integration Team performs an IT DUE DILLIGENCE to get an accurate measure of assets.
	Define synergy possibilities	The IT Integration Team assess the synergy possibilities, with the help of EA MODELLING
	Choose IT integration route	With the information provided, the Project Team develops an ANALYSIS DOCUMENT to analyze, which route to take, within the IT integration roadmap.

## Activities and sub-activities in the IT process integration phase

Activity	Sub-Activity	Description
<b>IT Integration approach (IT process integration)</b>	Find overlapping IT process(es)	The IT Integration Team find and list each overlapping IT PROCESS.
	List best practice(s)	The IT Integration Team lists the BEST PRACTICE, for each overlapping IT PROCESS.
	Integrate laws and regulations	The IT Integration Team describe, which LAW AND REGULATION needs to be integrated and how to integrate them.
	Develop IT process integration plan	With the information provided, the IT Integration Team defines how to integrate the BEST PRACTICES for each overlapping IT PROCESS and develop an IT PROCESS INTEGRATION PLAN

## Activities and sub-activities in the IT systems integration phase

Activity	Sub-Activity	Description
<b>IT Integration approach</b> <b>(IT systems integration)</b>	List used systems	The IT Integration Team list the used business and IT systems in a SYSTEMS LIST
	Find overlapping functionalities	The IT Integration Team find and list the overlapping system functionalities in a FUNCTIONALITY LIST
	Perform best of breed selection	The IT Integration Team performs a BEST OF BREED system selection, according to each overlapping system functionality.
	Develop system integration plan	With the information provided, the IT Integration Team defines how to integrate each overlapping system and develops a SYSTEM INTEGRATION PLAN.
	Develop data integration plan	If necessary, the IT Integration Team define how to integrate the data from the systems and develop a DATA INTEGRATION PLAN.

## Activities and sub-activities in the IT infrastructure integration phase

Activity	Sub-Activity	Description
<b>IT Integration approach</b> <b>(IT infrastructure integration)</b>	Define IT infrastructure	The IT Integration Team define the IT INFRASTRUCTURE of both IT departments.
	Assess IT infrastructure compatibility	The IT Integration Team assess the IT INFRASTRUCTURE compatibility with the help of a COMPATIBILITY ASSESSMENT
	Choose most suitable location	The IT Integration Team choose the most suitable LOCATION for the future integrated IT INFRASTRUCTURE.
	Develop equipment move strategy	The IT Integration Team develop an EQUIPMENT MOVE STRATEGY.
	Develop IT infrastructure integration plan	With the information provided, the IT Integration Team define how to integrate the best IT INFRASTRUCTURE parts and develop an IT INFRASTRUCTURE INTEGRATION PLAN

## Activities and sub-activities in the IT personnel integration phase

Activity	Sub-Activity	Description
<b>IT Integration approach (IT personnel integration)</b>	Inform and reassure IT personnel	The Project Team designs an INFORMATION SESSION to inform and reassure the IT personnel.
	Assign responsibility	The Project Team defines the new positions and RESPONSIBILITY for the IT personnel of the newly formed IT department.
	Build IT staff commitment	The Project Team defines steps to build IT personnel commitment through TEAMBUILDING.
	Develop IT personnel integration plan	With the information provided, the Project Team defines how to integrate the IT personnel of both IT departments and design an IT PERSONNEL INTEGRATION PLAN.

## Activities and sub-activities in the management phase

Activity	Sub-Activity	Description
<b>Management phase</b>	Develop program management plan	The Project Team defines what the program requirements are and develops a PROGRAM MANAGEMENT PLAN.
	Develop risk management plan	The Project Team defines what the risks of the project are and develops a RISK MANAGEMENT PLAN to minimize risk.
	Define Key Performance Indicators	The Project Team defines the Key Performance Indicators (KPI).
	Define milestone monitoring	The Project Team defines how the MONITORING of milestones will be achieved.
	Develop IT integration time schedule	The Project Team develops an IT INTEGRATION TIME SCHEDULE, for the execution of the IT integration roadmap.
	Develop IT integration execution plan	With the information provided, the Project Team develops an IT INTEGRATION EXECUTION PLAN, to outline how to execute the IT integration roadmap.

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## Appendix 3: Expert validation Interviews

### Vragenlijst post merger IT integratie methode

Bedrijf: AEGON  
Afdeling: IT afdeling  
Naam: Menno Olgers  
Functie: IT Manager

#### **Vind u dat er een noodzaak is voor een post merger IT integratie methode?**

In de integraties die ik meegemaakt heb, is de noodzaak voor een IT integratie methode er niet geweest. Maar nu ik de volledigheid van de methode zie, zou ik dit wel degelijk als een goede basis kunnen gebruiken.

#### **Wordt er binnen de organisatie gebruikt gemaakt van een IT integratie methode?**

Nee.

#### **Zou u de IT integratie methode kunnen gebruiken zonder verdere uitleg?**

Bij sommige producten zou ik een wat uitgebreidere beschrijving nuttig vinden.

#### **Vind u de IT integratie methode duidelijk en overzichtelijk op het eerste gezicht?**

Ik vind het gebruik van Visio voor het uitwerken van een methode zeer geschikt.

#### **Wat vindt u van de volgorde en volledigheid van de hoofdprocessen?**

Ik zie zowel projectmanagement processen als inhoudelijke integratie processen voorkomen wat voor mij aangeeft dat dit meer dan compleet is.

#### **Wat vindt u van de volgorde en volledigheid van de sub processen binnen de hoofdprocessen?**

De sub processen zijn dusdanig uitgewerkt dat ik hier niets op heb aan te merken.

#### **Wat vindt u van de volgorde en volledigheid van de producten (deliverables)?**

Het zijn behoorlijk wat producten, echter vind ik ze wel zeer belangrijk voor het opstellen van een uitvoerbaar integratieplan.

#### **Wat zou u aan de IT integratie methode toevoegen?**

Mijn inzien is deze compleet en zou ik hier niets aan willen toevoegen.

#### **Wat zou u uit de IT integratie methode laten?**

Indien mogelijk processen en/of producten samenvoegen om tot een kortere doorlooptijd te komen. Bijvoorbeeld in de 'Orientation phase' het product 'staffing plan' en 'responsibility'.



**Zou u het gebruik van deze IT integratie methode adviseren binnen uw organisatie (afdeling)?**

Indien wij een IT integratie zouden ondergaan zou ik zeker deze methode adviseren. Zoals eerder aangegeven, deze methode is ontzettend compleet en geeft ons een leidraad om te volgen.

**Overige opmerkingen**

Geen

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## Vragenlijst post merger IT integratie methode

Bedrijf: Getronics  
Afdeling: IT transitie en migratie  
Naam: Frederique Verhoeff  
Functie: IT Integration Manager

### **Vind u dat er een noodzaak is voor een post merger IT integratie methode?**

Ja, de noodzaak is er wel degelijk. Een IT Integratie uitvoeren zonder methode is een onmogelijke taak.

### **Wordt er binnen de organisatie gebruikt gemaakt van een IT integratie methode?**

Binnen onze organisatie maken gebruik van een stappenplan die in grote lijnen beschrijft hoe de integratie doorlopen dient te worden.

### **Zou u de IT integratie methode kunnen gebruiken zonder verdere uitleg?**

Ja.

### **Vind u de IT integratie methode duidelijk en overzichtelijk op het eerste gezicht?**

Ja, alleen de lijnen tussen de verschillende producten gaven bij het eerste oogopslag een chaotisch beeld.

### **Wat vind u van de volgorde en volledigheid van de hoofdprocessen?**

De hoofdprocessen zijn in volledigheid uitgebreider dan ons huidige stappenplan.

### **Wat vind u van de volgorde en volledigheid van de sub processen binnen de hoofdprocessen?**

In onze stappenplan beschrijven wij alleen op hoofdlijnen, de onderliggende processen zijn bij ons niet uitgewerkt. Deze IT integratie methode geeft dermate goed wat de sub processen in elke hoofdproces moeten zijn.

### **Wat vind u van de volgorde en volledigheid van de producten (deliverables)?**

In onze stappenplan beschrijven wij alleen op hoofdlijnen, de onderliggende producten zijn bij ons niet uitgewerkt. Deze IT integratie methode geeft dermate goed wat de producten van elke sub proces moeten zijn.

### **Wat zou u aan de IT integratie methode toevoegen?**

In de 'IT Infrastructure integration phase' zou ik nog een keuzenbox plaatsen tussen de volgende sub processen: 'Choose most suitable location' en 'Develop equipment move strategy'. Dit omdat er niet altijd hardware verhuist dient te worden, bijv. als er alleen data integratie plaatsvindt.

### **Wat zou u uit de IT integratie methode laten?**

Ik zou er niets uithalen, echter zou ik er wel meer keuzenboxen aan willen toevoegen zodat IT integratie methode in meerdere integratiesituaties toepasbaar kan zijn.



**Zou u het gebruik van deze IT integratie methode adviseren binnen uw organisatie (afdeling)?**

Ja, ik zou deze tijdens een volgende integratie graag willen toepassen aangezien onze huidige stappenplan enkele tekortkomingen heeft in vergelijking met deze IT integratie methode.

**Overige opmerkingen**

Geen

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## Vragenlijst post merger IT integratie methode

Bedrijf: Logica  
Afdeling: IT Management  
Naam: Patrick van Delsen  
Functie: Integration consultant

### **Vind u dat er een noodzaak is voor een post merger IT integratie methode?**

Ja, behalve voor klanten die midden in een post merger integratie zitten is dit ook een goed model dat wij intern kunnen gebruiken. Wij zitten midden in een merger met een groot Canadese organisatie (CGI). Na het bekijken van het model zijn er onderdelen naar boven gekomen die tussen wal en schip zouden vallen. De methode zorgt voor een compleet beeld.

### **Wordt er binnen de organisatie gebruikt gemaakt van een IT integratie methode?**

Niet zo compleet zoals deze beschreven staat in het model.

### **Zou u de IT integratie methode kunnen gebruiken zonder verdere uitleg?**

Om het model volledig en juist te kunnen implementeren zou een verdere uitleg wel mijn voorkeur hebben.

### **Vind u de IT integratie methode duidelijk en overzichtelijk op het eerste gezicht?**

Ja, de fasen zijn goed te volgen en de op te leveren producten zijn in een oogopslag herkenbaar.

### **Wat vindt u van de volgorde en volledigheid van de hoofdprocessen?**

De volgorde ziet er logisch uit; proces -> systeem -> infrastructuur -> personeel. Naar mijn beeldvorming is dit meer dan volledig.

### **Wat vindt u van de volgorde en volledigheid van de subprocessen binnen de hoofdprocessen?**

Het zou mij niet verbazen dat er in de praktijk sommige sub processen simultaan zouden kunnen plaatsvinden.

### **Wat vindt u van de volgorde en volledigheid van de producten (deliverables)?**

Op het eerste gezicht zie ik alle producten waarmee een uitvoerbaar IT integratie plan opgesteld kan worden.

### **Wat zou u aan de IT integratie methode toevoegen?**

In het 'system integration process' wordt niet duidelijk beschreven hoe het bedrijfspersoneel met de eventuele nieuwe systemen zal moeten gaan werken. Ook wordt in het 'IT personnel integration process' niet beschreven hoe het IT personeel met de eventuele nieuwe IT systemen zal moeten gaan werken. Denk hierbij aan bijvoorbeeld het toevoegen van een sub proces scholing, training of kennis overdracht.

### **Wat zou u uit de IT integratie methode laten?**

Niets, want dit zou ten koste gaan van de compleetheid van het model.



**Zou u het gebruik van deze IT integratie methode adviseren binnen uw organisatie (afdeling)?**

Dit model zouden wij kunnen gebruiken als dienst die wij aan onze klanten zouden kunnen aanbieden.

**Overige opmerkingen**

Delen van deze post merger integratie methode lijken ook bruikbaar voor andere integraties.

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## Vragenlijst post merger IT integratie methode

Bedrijf: UWV  
Afdeling: IT afdeling  
Naam: Martijn Blanken  
Functie: IT Project Manager

### **Vind u dat er een noodzaak is voor een post merger IT integratie methode?**

Nee, want de huidige manier van werken heeft ook altijd tot de gewenste uitkomst geleid.

### **Wordt er binnen de organisatie gebruikt gemaakt van een IT integratie methode?**

Deze zijn er wel, echter niet zo uitgebreid en niet voor een post merger. Zo hebben wij bijvoorbeeld wel een integratie model voor systemen en infrastructuur.

### **Zou u de IT integratie methode kunnen gebruiken zonder verdere uitleg?**

Ja, met de bijgevoegde beschrijving is de methode goed te volgen.

### **Vind u de IT integratie methode duidelijk en overzichtelijk op het eerste gezicht?**

Dergelijke schema's zijn voor mij niet onbekend, daarom vind ik de manier waarop de methode is uitgewerkt overzichtelijk en duidelijk.

### **Wat vind u van de volgorde en volledigheid van de hoofdprocessen?**

De hoofdprocessen volgen elkaar goed en ik kan geen onvolledigheden vinden.

### **Wat vind u van de volgorde en volledigheid van de subprocessen binnen de hoofdprocessen?**

De sub processen zijn naar mijn mening overcompleteet, ik zou de project management activiteiten eruit willen halen waardoor je alleen de daadwerkelijke IT integratie activiteiten overhoudt. Bijv. enkele sub processen uit de 'Initiation phase, Orientation phase, of IT integration management phase'.

### **Wat vind u van de volgorde en volledigheid van de producten (deliverables)?**

Voor mij geldt hierbij hetzelfde als bij de sub processen, afbakenen tot daadwerkelijke IT integratie producten zodat men sneller tot een IT integratie plan kan komen.

### **Wat zou u aan de IT integratie methode toevoegen?**

Niets, eerder onderdelen weglaten.

### **Wat zou u uit de IT integratie methode laten?**

De 'IT infrastructure integration phase', aangezien het niet altijd noodzakelijk is de IT infrastructuur te integreren als hetzelfde ook gerealiseerd kan worden met alleen een data integratie.



**Zou u het gebruik van deze IT integratie methode adviseren binnen uw organisatie (afdeling)?**

Nee, want de huidige manier van werken heeft ook altijd tot de gewenste uitkomst geleid. Maar de methode geeft wel een compleet overzicht van wat er allemaal tijdens een integratie aanbod komt.

**Overige opmerkingen**

Het toevoegen van een aangekoppelde planning (bijv. in MS Projects) waar de onderdelen van de methode in zijn verwerkt. Dit zou ervoor kunnen zorgen dat ik hier sneller mee aan de slag kan.

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## Vragenlijst post merger IT integratie methode

Bedrijf: Imtech  
Afdeling: Imtech ICT Integrated Solutions  
Naam: Theo Kooijmans  
Functie: Project Manager

### **Vind u dat er een noodzaak is voor een post merger IT integratie methode?**

Ja dat vind ik zeker, maar dan moet het er wel een zijn die in zijn geheel uitvoerbaar moet zijn door een externe partij. In deze methode wordt er indien nodig gebruik gemaakt van externe resources, echter adviseer ik om dit volledig door externe te laten uitvoeren. Het uitvoeren door interne medewerkers neemt veel risico's met zich mee zoals belangenverstrengelingen, vasthouden aan oude gewoonten, niet kunnen loslaten etc. etc.

### **Wordt er binnen de organisatie gebruikt gemaakt van een IT integratie methode?**

Ja, bedrijven huren ons in om deze methode te implementeren in hun organisatie. Deze heeft tot heden tot goede resultaten geleidt.

### **Zou u de IT integratie methode kunnen gebruiken zonder verdere uitleg?**

Nee, zonder verdere uitleg zouden sommige termen, die in de sub processen en producten gebruikt worden niet tot hun recht komen. Enkele hiervan zijn bijvoorbeeld EA Modeling en IT Due Diligence. Soortgelijke processen en producten bezitten wij wel maar dit heeft bij ons benamingen zoals proces mapping en kosten baten analyse (financial review).

### **Vind u de IT integratie methode duidelijk en overzichtelijk op het eerste gezicht?**

De methode is op het eerste gezicht duidelijk en overzichtelijk, dit aangezien de methode opgebouwd is uit opeenvolgende proces blokken. Deze blokken laten goed zien wat er in elk hoofdproces dient te gebeuren en welk product er opgeleverd moet worden.

### **Wat vind u van de volgorde en volledigheid van de hoofdprocessen?**

In grote stappen zijn de hoofdprocessen juist, alleen zijn de hoofdprocessen bij ons meer gesplitst op het uitvoeren door een externe partij. In deze methode wordt er steeds vanuit de interne organisatie gekeken en gewerkt. Persoonlijk vind ik dat er hierdoor teveel conflicten kunnen ontstaan tussen beide partijen.

### **Wat vind u van de volgorde en volledigheid van de subprocessen binnen de hoofdprocessen?**

Het sub proces 'outsourcing' moet eerder plaatsvinden bijv. in de IT Business Case. Zo kun je ook horen wat zij te bieden hebben op het gebied van IT integratie solutions.

### **Wat vind u van de volgorde en volledigheid van de producten (deliverables)?**

Volgorde is goed maar de volledigheid vind ik iets te ambitieus. Zoveel processen en producten zouden het hele project kunnen vertragen. Externe medewerkers zouden het een en ander uit kunnen zoeken en direct kunnen implementeren.



**Wat zou u aan de IT integratie methode toevoegen?**

Volgorde van de integratie methode, deze dient zodanig te veranderen dat er alleen taken zijn die door een externe partij uitgevoerd kunnen worden. Zo zou het vormen van interne IT integratie teams en deze taken toekennen niet nodig zijn. Dit aangezien de externe medewerkers de integratie taken, uit handen van de huidige medewerkers kunnen nemen.

**Wat zou u uit de IT integratie methode laten?**

De IT Integratie team vormen is niet meer nodig indien de externe medewerker alles zelf gaan uitzoeken en d.m.v. interviews informatie achterhalen. Voordeel is ook dat de interne medewerkers door kunnen met de business as usual en hun dagelijkse taken.

**Zou u het gebruik van deze IT integratie methode adviseren binnen uw organisatie (afdeling)?**

Ja, maar dat met de eerder genoemde wijzigingen.

**Overige opmerkingen**

Geen.

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## Vragenlijst post merger IT integratie methode

Bedrijf: Erasmusbrug support BV

Afdeling: IT services

Naam: Erik de Groot

Functie: IT Consultant

### **Vind u dat er een noodzaak is voor een post merger IT integratie methode?**

Wij zijn momenteel bezig met een grote IT integratie bij Careyn. Dit is een zorginstelling die sinds kort is gaan fuseren met Zuwe en Aveant. Hierbij was het ook de bedoeling dat de IT na de fusie geïntegreerd diende te worden. Hierbij zou een post merger IT integratie methode goed van pas komen. Momenteel maken wij gebruik van een algemene stappenplan die toepasbaar is bij de meeste IT integraties.

### **Wordt er binnen de organisatie gebruikt gemaakt van een IT integratie methode?**

Zoals eerder aangegeven maken wij gebruik van een stappenplan dat in grote stappen beschrijft wat er gedaan dient te worden en welke personen er aangewezen dienen te worden om tot een juiste inschatting en executie van de integratie te komen.

### **Zou u de IT integratie methode kunnen gebruiken zonder verdere uitleg?**

De methode zouden wij wel kunnen gebruiken, aangezien de hoofdprocessen grotendeels overeenkomen met die in ons huidige stappenplan. Wel zou wat meer uitleg voor sommige sub processen en producten handig zijn. Zo zou ik mij bijvoorbeeld niet direct kunnen voorstellen wat er met het product EA Modelling bedoeld wordt. Maar kan ik met behulp van het sub proces define synergy possibilities wel een idee krijgen wat voor product er opgeleverd dient te worden.

### **Vind u de IT integratie methode duidelijk en overzichtelijk op het eerste gezicht?**

Deze is duidelijk en overzichtelijk, dit omdat wij ook gebruik maken van Microsoft Visio voor het ontwikkelen van modellen en schema's.

### **Wat vind u van de volgorde en volledigheid van de hoofdprocessen?**

Deze zijn volgens mij volledig en de volgorde van de hoofdprocessen volgen elkaar goed op. Bij Erasmusbrug Support BV worden de integration approaches meestal gewoon onder 1 hoofdproces IT integratie geschoven en de management processen zoals Initiation, oriëntation en analysis phase onder 1 algemene management proces.

### **Wat vind u van de volgorde en volledigheid van de subprocessen binnen de hoofdprocessen?**

Volgorde en volledigheid is naar mijn inzicht zeer uitgebreid en omvat alle belangrijke aspecten

### **Wat vind u van de volgorde en volledigheid van de producten (deliverables)?**

Hierbij geldt hetzelfde als voor de sub processen. De juiste producten zijn belangrijk voor elk hoofdproces om tot de juiste keuze en uitvoering van de IT integratie te komen.

**Wat zou u aan de IT integratie methode toevoegen?**

Ik zou de keuzen “renewal”, “take over” en “standardization” terug willen zien tussen de integration approaches. Hierdoor wordt er bij elke integration approach nagedacht welke route er het beste genomen kan worden. Nu wordt dit op één hoop geveegd terwijl er per Integration approach een verschil kan zijn in de route. Want er bestaan ook situaties waar een best of breed selectie niet mogelijk is en er een nieuwe software pakket gekozen dient te worden.

**Wat zou u uit de IT integratie methode laten?**

Ik vind de methode zeer uitgebreid, misschien een beetje te uitgebreid wat weer tot tijdverlies lijdt. Sub processen met als doel een verzamel document te creëren zoals “develop orientation document en develop integration plans” zou ik uit de methode laten. Dit om tijdswinst te boeken.

**Zou u het gebruik van deze IT integratie methode adviseren binnen uw organisatie (afdeling)?**

Nee, dan zou ik er het een en ander aan veranderen zoals de eerder genoemde keuzen boxen. Wel zouden we er bepaalde sub processen uit kunnen halen om tot een betere inschatting van de integratie te komen en om uit te zoeken welke richting de integratie op wil.

**Overige opmerkingen**

Nee.



## Vragenlijst post merger IT integratie methode

Bedrijf: CGI  
Afdeling: IT Management  
Naam: Luuk Gelsing  
Functie: Project Leider

### **Vind u dat er een noodzaak is voor een post merger IT integratie methode?**

Nee, een specifieke methode voor het integratie proces vind ik niet nodig. Aangezien dit ook in afzonderlijke projecten uitgevoerd kan worden.

### **Wordt er binnen de organisatie gebruikt gemaakt van een IT integratie methode?**

Ja, alleen mondt deze zich niet uit in een IT integratie project plan, maar wordt de daadwerkelijke integratie na goedkeuring direct uitgevoerd.

### **Zou u de IT integratie methode kunnen gebruiken zonder verdere uitleg?**

Ja, want de hoofdstappen zijn heel herkenbaar voor mij aangezien ik deze ook in mijn projecten doorloop.

### **Vind u de IT integratie methode duidelijk en overzichtelijk op het eerste gezicht?**

Ja, aangezien wij ook veel schema's in Visio construeren is dit herkenbaar voor mij.

### **Wat vind u van de volgorde en volledigheid van de hoofdprocessen?**

De hoofdprocessen bevatten voldoende aspecten om tot een complete IT integratie plan te komen.

### **Wat vind u van de volgorde en volledigheid van de subprocessen binnen de hoofdprocessen?**

Hierbij geldt hetzelfde als de hoofdprocessen er wordt voldoende onderzocht om tot een IT integratie plan te leiden. Doch zouden er meerdere sub processen mogelijk kunnen zijn voor elke integratie. Iedere integratie heeft zo zijn eigen specifieke eigenschappen en die dienen dan ook behandeld te worden. Deze sub processen zouden dan toegevoegd moeten worden aan de integratie methode om tot een situatie specifieke integratie methode te komen.

**Wat vind u van de volgorde en volledigheid van de producten (deliverables)?**

Deze zijn in de huidige methode compleet te noemen doch zal er rekening moeten worden gehouden met het feit dat er meerdere producten bij kunnen komen, naarmate het aantal sub processen stijgt.

**Wat zou u aan de IT integratie methode toevoegen?**

Een hoofd of enkele sub processen die innovatie en verbeteringen in de toekomstige situatie mogelijk maken. Dit zou innovatie kunnen beteken op het gebied van processen, systemen en infrastructuur. In de standarisatie methode wordt er momenteel alleen gekeken naar best of breed selectie, terwijl er wellicht inmiddels nieuwe technologieën en applicaties bestaan die voor verbetering kunnen zorgen. In de praktijk zie je bijvoorbeeld dat er steeds meer bedrijven overgaan naar virtuele oplossingen.

**Wat zou u uit de IT integratie methode laten?**

Naar mijn mening is het niet noodzakelijk om het integratie proces zo gedetailleerd uit te werken in een integratie projectplan. De eerste drie hoofdprocessen en het management proces aan het eind zijn handig, maar de verschillende integration approaches kunnen eerder als afzonderlijke projecten worden opgepakt en direct worden uitgewerkt.

**Zou u het gebruik van deze IT integratie methode adviseren binnen uw organisatie (afdeling)?**

Nee, want onze huidige werkwijze voldoet. Een gedetailleerde IT integratie projectplan maken zal teveel te tijd vergen en niet geaccepteerd worden door onze klanten.

**Overige opmerkingen**

Geen



## Appendix 4: Interview summary

Questions	<b>Getronics</b> Frederique Verhoeff Project manager 8year experience	<b>Aegon</b> Menno Olgers IT manager 15year experience	<b>UWV</b> Martijn Blanken Project manager 9year experience	<b>Logica</b> Patrick van Delsen Consultant 6year experience	<b>Imtech</b> Theo Kooijmans Project manager 7year experience	<b>Erasmusbrug</b> Erik de Groot Consultant 5year experience	<b>CGI</b> Luuk Gelsing Project manager 8year experience
<b>Need for such a method</b>	Yes	No, But a very good basis	No	Yes	Yes	Yes	No
<b>The companies own IT integration method</b>	Use a roadmap that broadly describes how the integration should be completed	No,	They are not as extensive. Our integration model mainly focuses on systems and infrastructure	Yes, Not as complete as this one.	Yes	A general roadmap	Yes, but an actionable integration method
<b>Completeness of main processes</b>	Complete	Complete	Follow each other well	Sequence looks logical	Complete	Complete	Complete
<b>Completeness of sub processes</b>	Our roadmap only describes the broad steps to IT integration. Underlying processes have not been elaborated	Nothing to complain about	Sub-processes are complete in my opinion.	Some sub processes could occur simultaneously	Sub proces 'outsourcing' should occur earlier in the method (IT Business Case)	Very extensive Includes all aspects	Situation-specific integration aspects must be able to be added to
<b>Completeness of products</b>	Very complete. Underlying processes have not been elaborated in our Integration method	Quite a lot of products but their very important	Only define the IT integration products. to speed up IT integration plan.	See all products which can form an executable IT integration plan	Completeness little too ambitious. Too many products can slow down the process	Proper and complete to deliver an IT integration plan	Complete. When adding sub processes the number of products may increase
Thesis document					95		



<b>What should be added to the method</b>	In 'IT Infrastructure integration phase' add checkboxes between the processes	Complete nothing to add	Nothing, rather leave parts out	Adding a sub process of education, training and knowledge transfer	Customize order, so that the method is executable by external parties	The choices "renewal", "take over" and "standardization" reflected in the integration approaches	A head or some sub processes which enable innovation and improvement in the future situation
<b>What should be left out of the method</b>	Nothing	Add processes and or products together to come to a shorter turnaround time	IT infrastructure 'integration phase'. It is not always necessary to integrate the IT infrastructure	Nothing, comes at the expense of the completeness	IT Integration team is no longer needed if the external employee sort out everything their self	Sub processes with the goal to create a collective document should be left out of the method. This creates time savings	Different integration approaches should be picked up as separate projects and elaborated immediately
<b>Use within own company</b>	Yes.	Definitely recommend this method, very complete. guidance	No, current way of working has led to desired outcomes	Yes, to offer to customers as a service	Yes, but with the changes mentioned	No, not as a whole however useful to get to a correct estimate of the integration	No, The current method works well
<b>Other comments</b>	No	No	Adding an attached schedule (MS Projects) starts the project faster	Parts of the integration method also seem useful for other integrations	Nothing to add	No	Nothing to add