

Merger and Acquisition IT Integration: Active Directory

This checklist is designed for Active Directory integration projects related to a Merger and Acquisition. It is meant to serve as a reference point for the major considerations in such a project.

HOW TO USE THIS CHECKLIST

Each IT integration project is unique based on the timelines, the makeup of the environment and the goals or outcomes sought to support the overall M&A cost synergies.

This checklist is designed to help you keep track of the big items you need to consider in your planning and to spur discussion. It will help drive your conversations about the business and help your team understand which items your team can gloss over versus which ones they really need to dig into. Not every line item will be valid for your integration, and for those that are valid, you will need to create your own tasks and sub-items since those are unique to each situation.

DAY 0: INTEGRATION PLANNING

The planning for consolidating IT environments in an acquisition starts before the deal is inked. Before the contracts are signed, leadership teams should understand the cost of the integration and have a high-level understanding of the timeline to accomplish the task. For this to be achieved, key individuals from the IT team must be brought under NDA to assess the target's legacy systems and size the application effort and infrastructure cost. In some cases, infrastructure costs can be equal to or even greater than the application migration efforts.

A key focus of the integration should be on reducing risk and avoiding disruption. That means performing a thorough RAID management discussion (see Figure 1), maintaining security and compliance measures throughout, reporting on status regularly, and establishing clear permissions, privileges and access rights. It also means having a clear backup plan in place in case something goes wrong.

BEST PRACTICE CHECKLIST:

Organizational readiness

Component	Owner	Valid (Y/N)	Notes
Executive sponsorship			
Organizational accountability			
Communication plan			
RAID management			
Support plan			
Escalation process			
Change control process			
Rollback process			
Migration schedule			

R

Risk: Something that may occur or may affect the project for better or worse.

A risk, if not managed appropriately, could lead to an issue for the project.

A

Assumption: A statement presumed will happen, and serving as basis for project planning.

If assumption proves to be false, it could impact the project.

Action: A task with a defined owner and due date that is tracked.

I

Issue: A risk event that has already occurred or other condition that will impact (or is already) the project.

D

Dependency: Activities or deliverables required from sources outside the project for success.

Decision: A determination arrived by the project team after consideration of project-related issues and risks.

Figure 1. RAID management discussion checklist

Infrastructure target readiness

Component	Owner	Valid (Y/N)	Notes
AD domain/forest			
Schema			
AD sites			
AD subnets			
AD replication links			
Domain controllers deployed			
User OU structure			
Workstation OU structure			
Server OU structure			
User GPOs deployed			
Workstation GPOs deployed			
Server GPOs deployed			
Logon scripts			
AD delegation			
DNS Servers configured			
Client DNS suffix			
DHCP scopes			
Domain password policy			
Auditing & monitoring			
Backup & recovery			
Patching & antivirus			
Azure AD Connect			
Authentication			

Quest tools

Component	Owner	Valid (Y/N)	Notes
Migration Manager for AD			
Directory sync jobs			
Recovery Manager for AD			
Domain Migration Agent			
Migration Manager for Exchange			
Enterprise Reporter			
On Demand Recovery for Azure AD			
Change Auditor			
Active Roles			

DAY 1: INTEGRATION EXECUTION

This is it! The day(s) it all comes together. This section encompasses both the Legal Day One (LD1) plan to get employees communicating and collaborating between the two organizations and the actual migration project.

Organizational readiness

Executive reporting structure			
End user notification			
Help desk readiness			
Coexistence plans			

LD1 communication and collaboration

Trust relationship structure for LD1 communication & collaboration			
HR communication (employee transitions)			
User deactivation process			
User auditing & security notifications			

Preparation, validation and testing

Target preparation & architecture validation			
AD backups			
Software installation & configuration			
Migration testing & pilot			
Component testing			
Implement coexistence changes			
Update project plans & documentation			
Component testing			

Installation, preparation and configuration

Component	Owner	Valid (Y/N)	Notes
Implement provisioning & administration changes			
Implement security / audit / reporting changes			
Software installation & configuration			
Alpha migrations & validation			
Train & prepare support teams			
Update communication & coexistence plans			

Production pilot

Validate target readiness			
Initial synchronization			
Establish coexistence			
Beta migration(s)			
Pilot migration(s) & support			
Pilot & coexistence evaluation			

Production migrations

Group migrations based on location & business			
Leverage existing distribution cycle			
Directory coexistence			
Migrate user credentials			
Synchronize key data			
Synchronize availability data			
Legacy access (enable SID history)			

Post-migration

SID translation (remove SID history)			
Update user profiles			
Final cleanup & decommissioning			

DAY 2: ONGOING MANAGEMENT

As its name implies, ongoing management includes activities that must be planned and executed throughout the merger or acquisition integration. The goal is to establish workflows between the two organizations so that productivity and communications can be maintained.

Organizational readiness

Component	Owner	Valid (Y/N)	Notes
Roles & responsibilities			
Communications plan			
Training			
Governance requirements			

Account and groups

User attributes			
Group membership			
Password sync			

Workstation

Profile			
User GPO settings			
Mapped drives			
Workstation GPO settings			
DHCP settings			
Domain settings			
Certificates			
Endpoint protection			

Server

Application coexistence

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If your organization is involved in a merger and acquisition, the impending IT integration project might seem overwhelming. But it needn't be. In fact, the project can be the perfect opportunity to clean up, consolidate and modernize your Microsoft IT infrastructure to meet the business requirements you're facing anyway, such as creating greater collaboration across departments by moving your content and communication tools to Office 365. The IT integration project you're dreading can actually be the gateway to the clean, manageable, secure IT environment your organization wants and needs.

Of course, few IT professionals, even CIOs, have much experience with hybrid AD, email and content migration projects. That's why it's critical to find the right partner and select the most appropriate tools to help facilitate the transition. With Quest solutions, you can conquer the complexities of an M&A IT integration. We offer a comprehensive framework for the effective integration, consolidation and management of on-premises, cloud and hybrid Microsoft environments — software and services you can count on, again and again. Even better, it's repeatable: you become familiar with one set of solutions, one support team and one services team, so when the next M&A falls into your lap, you'll be prepared.

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