

# Financial Services M&As

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

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

bankdirector.com, "2018 Bank M&A Survey: Will Bank M&A Pick Up?" December 2017

	<b>PHASE 1:</b> <b>PRE-ANNOUNCEMENT</b> 	<b>PHASE 2:</b> <b>ANNOUNCEMENT</b> 	<b>PHASE 3:</b> <b>DAY 1 + BEYOND</b> 
<b>ACTIONS AND ANALYSIS</b>	<ul style="list-style-type: none"> <li>Acquisition target identified</li> <li>Execute proper agreements</li> <li>Plan IT due diligence process</li> </ul>	<ul style="list-style-type: none"> <li>Roadmap and plan, design and architecture</li> <li>Evaluate and select core and ancillary applications</li> <li>Identify infrastructure, operating systems and cloud considerations</li> </ul>	<ul style="list-style-type: none"> <li>Integration</li> <li>Operation</li> <li>Support</li> </ul>
<b>TYPICAL PARTIES INVOLVED</b>	<ul style="list-style-type: none"> <li>IT</li> <li>Management</li> <li>Risk and Compliance</li> <li>Operations</li> </ul>	<ul style="list-style-type: none"> <li>IT</li> <li>Management</li> <li>Operations</li> <li>HR</li> </ul>	<ul style="list-style-type: none"> <li>IT</li> <li>Management</li> <li>Operations</li> <li>HR</li> </ul>
<b>KEY MILESTONES AND CONSIDERATIONS</b>	<ul style="list-style-type: none"> <li>Determine Timeline</li> <li>Complete System Security IT Assessment</li> <li>Determine Overall IT Merger Goal</li> <li>Determine Differences in IT Management</li> <li>Determine Key IT Differences Between Organizations</li> <li>Inventory Data-Related Systems</li> <li>Determine Acquired Company Asset Lifecycle</li> <li>Inventory Communication Networks/Systems</li> <li>Review Existing Application Mapping, Dependencies &amp; Prioritization</li> </ul>	<ul style="list-style-type: none"> <li>Plan Deployment/Management of New Data-Related Systems</li> <li>Asset Lifecycle Planning</li> <li>Plan Deployment/Management of New Comms Networks/Systems</li> <li>Plan Application Mapping, Dependencies &amp; Prioritization</li> <li>Data Lifecycle Planning</li> <li>Plan for Access, Authorization and Authentication Control</li> <li>Plan Future BCP/DR</li> <li>Plan Policy Changes</li> <li>Review Existing/Approved IT Strategies, Initiatives &amp; Roadmaps</li> <li>Plan Management of Licenses, Contracts &amp; SLAs</li> </ul>	<ul style="list-style-type: none"> <li>Core and Ancillary Application Conversions/Installations</li> <li>Implementation of New Data-Related Systems</li> <li>Implement Asset Lifecycle Management</li> <li>Procure, Deploy, Manage New Comms Networks/Systems</li> <li>Implement Data Lifecycle Management</li> <li>Access, Authorization and Authentication Control Implementation</li> <li>Ensure BCP/DR Plans In Place</li> <li>Ensure Existing/Approved IT Strategies, Initiatives, Roadmaps on Track</li> <li>Implement Management of Licenses, Contracts &amp; SLAs</li> <li>Ensure HW/SW Licensing Up to Date</li> <li>Implement IT Admin and Help Desk Management</li> </ul>

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	<b>PHASE 1: PRE-ANNOUNCEMENT</b> 	<b>PHASE 2: ANNOUNCEMENT</b> 	<b>PHASE 3: DAY 1 + BEYOND</b> 
<b>KEY MILESTONES AND CONSIDERATIONS</b>	<ul style="list-style-type: none"> <li>▪ Determine Acquired Company's Data Lifecycle</li> <li>▪ DR/BC Analysis &amp; Early Planning</li> <li>▪ Review Acquired Company's Policy Enforcement</li> <li>▪ Review Existing IT Strategies/Roadmaps</li> <li>▪ Thorough Document Review</li> <li>▪ Review Help Desk Capabilities</li> <li>▪ Review In-Process IT/Business Initiatives</li> <li>▪ Telecom Audit</li> </ul>	<ul style="list-style-type: none"> <li>▪ Plan IT Admin &amp; Help Desk Management</li> <li>▪ Review Application/Software Licensing Changes</li> <li>▪ Document New IT Service Process</li> <li>▪ Create Detailed Failover Plan</li> <li>▪ Plan IT Staff Changes/Training</li> <li>▪ Plan Managed Services</li> <li>▪ Review Vendor Contracts, Agreements, Commitments</li> <li>▪ Plan Mobility Management</li> <li>▪ Revise the IT Roadmap</li> <li>▪ Plan Security Consolidation</li> </ul>	<ul style="list-style-type: none"> <li>▪ Ensure Application/Software Licensing/Warranties/Leases/Changes Complete</li> <li>▪ Implement Vendor Contracts/Agreements/Commitments</li> <li>▪ Implement IT Staff Changes &amp; Training</li> <li>▪ Implement Managed Services (MSSP, Hosted Network, etc.)</li> <li>▪ Implement Website Changes</li> <li>▪ Implement Mobility Management</li> <li>▪ Implement Security Changes</li> <li>▪ Active Directory Integration</li> <li>▪ Application Integration</li> <li>▪ Implement Asset Decommissioning, Reallocation and/or Procurement</li> <li>▪ Ensure Plan Policy Changes</li> </ul>

## HOW WE CAN HELP

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

### Project Management and Consulting

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

### Software Asset Management

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

### Security Assessment

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

### Solutions

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

### Managed Services

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

## ADDITIONAL RESOURCES – CLICK TO DOWNLOAD



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-  [CDW MANAGED SERVICES](#)
-  [CDW SOLUTIONS](#)
-  [DATA CENTER](#)
-  [DIGITAL](#)
-  [M&A](#)
-  [MICROSOFT AZURE](#)
-  [SECURITY](#)
-  [SOFTWARE MANAGEMENT](#)
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