



A Practical Guide for Mergers & Acquisitions

How to protect your business, your people, and your investments when two companies become one.

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Book an M&A IT Readiness Call!

We'll help you identify your highest-priority risks and walk away with a clear picture of where to focus first.

[BOOK YOUR CALL >](#)

Where to Start

Introduction

Mergers and acquisitions create pressure on people first.

The employees who show up to work in a system they don't recognize. The IT team holding everything together behind the scenes. The customers on the other end who notice the disruption before anyone sends a memo about it.

When an integration struggles, people feel it before it shows up in a report.

Why IT is never just a workstream in 2026

In today's M&A environment, IT is often treated like a downstream task. That's a mistake.

AI adoption, cloud sprawl, and identity complexity mean companies aren't just merging infrastructure anymore. They're merging how people authenticate, collaborate, access data, and make decisions every day. You can't separate the technology from the operating reality of the business.

Once two companies combine, IT stops being a checklist item. It becomes the environment everyone is forced to work inside immediately. Whether that environment is stable or chaotic depends on decisions made early, often before the technical picture feels complete.

This guide focuses on those decisions. The ones made before systems are fully mapped, timelines are negotiated down, or optimism takes over. Because in M&A, the hardest problems rarely come from what you don't know. They come from what you delay.

What this guide covers

- What's really at stake when IT integration goes wrong
- The due diligence questions to ask before integration begins
- What a smooth integration actually looks like, phase by phase
- The most common mistakes and how to avoid them
- What to look for in an IT integration partner

What's at Stake

There is something that doesn't get said enough in the early stages of a merger and it's this: the deal closing is not the finish line. For the people who actually run the business, it's the starting flag.

The moment two organizations begin operating as one, the gaps between their systems become everyone's problem. Employees can't log in. Email breaks. Files that were supposed to migrate didn't. Someone in accounting is running reports from a system the other company has never heard of.

None of this is unusual. But it is avoidable with the right preparation.

<40% of M&A transactions create shareholder value.

The most common reasons aren't strategic, they're operational. Poor integration execution quietly erodes the value the deal was supposed to generate, and IT is almost always at the center of it.

Source: Deloitte

The issues that surface fastest when IT isn't ready

1

Employees locked out of systems on day one

2

Duplicate or conflicting user accounts and access permissions

3

Data that can't be found, accessed, or trusted

4

Security gaps created during the transition window

5

Licensing costs that balloon without timely consolidation

What's at Stake

The departments feeling it the most.

Every team in the organization experiences a merger differently, but a few feel the IT impact immediately.



Operations

Workflows that functioned well on Tuesday may fail on Wednesday due to incompatible tools. Standardized processes within a company must adapt to different methods when faced with new challenges.



Finance

Disconnected reporting systems obscure cost clarity, particularly for licensing costs, which often get duplicated across environments until manually addressed. This cleanup requires active intervention.



Leaders

Employees in both organizations sense uncertainty due to slow help desk responses, confusing systems, and unclear communication. This leads to disengagement, which affects productivity and retention.



IT Team

The IT team often reaches capacity quickly, managing two environments while executing an integration plan, sometimes without additional staff or external support to handle the workload.

THE QUESTION WORTH ASKING BEFORE INTEGRATION BEGINS

Does your team have the bandwidth, the experience, and the tools to execute this, or do you need an MSP IT partner who has done it before?

Due Diligence

The questions that need answers before integration begins

Most organizations go into a merger with a solid grasp of the financial picture, such as valuation, deal structure, projected synergies. What they often don't have is an equally clear picture of what's actually living inside both technology environments.

That gap is where integrations get expensive.

Before any data moves or systems get consolidated, someone needs to answer a core set of questions about both organizations. The answers shape everything that comes after: the timeline, the cost, the risk profile, and what kind of outside help you're going to need.

What to audit in both environments

IDENTITY & ACCESS

How are users managed? Who has admin access, and to what?

LICENSING

What software and cloud subscriptions are active across both organizations?

INFRASTRUCTURE

What does the hardware and network setup look like on each side (on-prem or cloud)?

SECURITY POSTURE

What endpoint protection is in place? Are there known vulnerabilities?

DATA STORAGE

Where does critical data live? Is it documented? Are there compliance considerations that affect the move?

HELP DESK & SUPPORT

How are IT issues handled today at each company? What ticketing systems are in use, and how will support be handled?

One decision that changes everything.

Of all the questions in the due diligence phase, the most consequential one isn't technical. It's this: **who is actually going to execute the integration?**

Internal IT teams are often stretched before a merger even starts. Adding a full integration on top of normal operations, without additional resources, is where timelines slip and mistakes happen. That's not a criticism—it's just the reality of what a merger asks of a team that's already running at capacity.

Organizations that come out of M&A in good shape almost always made a clear decision early about ownership and accountability for the integration work. Either they added dedicated internal resources, brought in an experienced outside partner, or both.

That decision is worth making explicitly, before the work begins, not after things start breaking.

FINANCE-LED DEALS OUTPERFORM

See how modern CFOs are keeping integrations from slipping off course.

[→ Read the article](#)

THINGS TO CLARIFY BEFORE INTEGRATION STARTS

- Who owns the integration project and has final decision-making authority
- Whether internal IT has the bandwidth to execute without outside help
- What the escalation path looks like when something goes wrong
- How communication will flow to employees in both organizations during the transition



Integration Roadmap

What good looks like, phase by phase.

A well-run IT integration isn't one big event. It's a sequence of deliberate phases, each one building on the last. When that sequence is followed, the transition is manageable. When it's skipped or compressed, chaos ensues.

PHASE 1

Assessment

This is where most M&A optimism meets reality for the first time.

The assessment phase should uncover the things that will slow the business down post-merger, such as, overlapping tools, undocumented dependencies, security gaps, and constraints. When this phase is treated as a formality, those issues don't disappear. They resurface after close, when options are fewer and fixes are more disruptive.

PHASE 2

Migration

On paper, migration looks like execution. In practice, it's where employee trust and operational stability are tested. When speed is prioritized over control, internal systems start working around the integration instead of through it. When paced intentionally, most disruption never surfaces.

PHASE 3

Stabilization & Support

Leadership often considers the job done once systems are moved, but the business knows better. Stabilization determines how long confusion lingers, how quickly productivity returns, and whether the integration feels like a transition or a prolonged disruption. Strong support compresses the recovery window. Weak support stretches it out and keeps the merger from fully settling.

Integration Roadmap

Realistic Timelines

One of the most common points of friction in M&A IT integration is expectation mismatch around timelines. Leadership wants it done in 30 days. IT knows it's a six-month project. Clear conversations early on help everyone understand what's actually involved.

What affects your timeline?

- Size and complexity of both environments
- How well-documented each company's systems are going in
- Whether identity and access management is centralized or scattered
- The number of applications that need to be migrated or retired
- Regulatory or compliance requirements that govern how data can be moved
- The availability and experience of the team executing the work



A typical tenant-to-tenant migration for a mid-sized company takes 3 to 6 months, while more complex environments require more time. Although timelines can be compressed, it raises risks, as faster integrations may not yield the best results.

Running point on an integration?

Book a 30-minute M&A IT readiness call with our team.

[CONTACT US](#)

Five places IT integrations tend to unravel.

Most integration failures aren't caused by one catastrophic mistake. They're caused by several smaller ones that compound over time. Knowing where they tend to happen makes them a lot easier to avoid.

01

Starting too late.

IT integration planning should begin during due diligence, not after the deal closes. When technical assessment gets pushed to post-close, teams could already be behind.

02

Underestimating the identity problem.

User accounts, permissions, and access rights are foundational to everything else in an integration. When identity management gets treated as a detail, employees lose access, security gaps open up, and the help desk buries itself on Day 1.

03

Letting licensing drift.

Both companies bring software agreements, cloud subscriptions, and vendor contracts to the table. Without active consolidation, organizations pay for duplicated tools for months longer than necessary and rarely notice until someone runs a report.

04

Neglecting change management.

Technology transitions are people transitions. When employees don't know what's changing or who to call when something breaks, productivity drops and frustration fills the gap.

05

Treating stabilization as the finish line.

The integration isn't done when the migration completes. It's done when employees are working effectively and support volume is back to normal. Teams that declare victory too early tend to find out what they missed a few weeks later.

Common Pitfalls

Mergers open a window threat actors watch for.

Mergers create a specific kind of security risk that doesn't exist during normal operations: two organizations with different security postures, different tools, and different policies are temporarily operating in a connected environment before either side has full visibility into the other.

That window is when threat actors pay attention.

Common exposures during M&A transitions include inconsistent multi-factor authentication enforcement, orphaned accounts from former employees of the acquired company, and security monitoring gaps where neither team's tools have full coverage of the combined environment.

These aren't hypothetical risks. They're the kinds of vulnerabilities that show up in post-incident reports after breaches tied to acquisition activity.

Getting security alignment right early in the integration — before systems are fully connected — is one of the highest-leverage things you can do to protect both organizations during the transition.

*Align security before systems connect, not after.
The integration window is short.
The consequences of missing it aren't.*



SECURITY PRIORITIES DURING M&A INTEGRATION

- Audit user accounts and remove or suspend anyone who should not have access
- Enforce consistent MFA across both environments as early as possible
- Establish unified endpoint monitoring before migration begins
- Make sure logging and alerting covers the combined environment, not just one side of it

Choosing the Right Partner

What to look for in an IT integration partner.

If you do bring in outside help at any point in the process, who you choose shapes how the integration actually feels for your team.



Proven M&A Experience

General IT competence is not integration experience, so look for a partner who has executed migrations and consolidations before and can point to the work.

Microsoft Expertise

If either organization runs on Microsoft 365 or Azure, your partner needs to know the stack at a level past familiarity.

A Clear Methodology

A good partner can walk you through their process from start to finish and tell you what each phase produces.

Honest Communication

Surprises will come up during any integration, and the right partner tells you immediately so you can make a clear-headed decision.

Support That Carries Through After Go-Live

The relationship should not end at go-live, because employees still have questions and the environment still needs tuning long after the migration is technically complete.

Choosing the Right Partner

What sets us apart in M&A work.

M&A timelines don't leave room for a vendor who needs to escalate. That's why companies in the middle of acquisitions come to Managed Solution, because our team actually solves the problem, not just log it.



You're talking to an engineer, not a coordinator.

90% of our team are engineers. When something breaks at 11pm during a cutover, you're not waiting for a ticket to route to someone technical. You're already talking to one.



Stay because it's working, not because you're locked in.

Our contracts include a 60-day out clause. We'd rather earn the relationship than hold it.



We know the Microsoft stack end-to-end.

We're certified across Azure, Modern Work, and Security, so nothing falls through the cracks between specialties.



We've done this before, at scale.

A federal loan servicing company brought us in mid-acquisition to consolidate two SharePoint environments into one. 1,000 sites. 1,900 libraries. A million files. Three terabytes of data. Done in 18 months, six ahead of the original estimate.

96.5%

CSAT Score

95%

Client retention

90%

Engineer-based team

23 years

Avg. engineer experience

Top 1%

Microsoft Consultancy
Worldwide

4x

Microsoft Solution
Partner designation

Have a migration planned or need help with transforming your IT?

Book a free M&A IT Readiness Call.

In 30 minutes, we'll help you identify your highest-priority risks and walk away with a clear picture of where to focus first.

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About

We're technology enthusiasts with a people-first approach. For over two decades, we've witnessed the profound impact that the right technology and support can have on businesses and individuals. Success, to us, is seeing our clients, partners, and team conquer challenges to achieve their greatest goals and build lasting connections. This relentless pursuit of inspiration drives us forward, pushing us to deliver innovative solutions that empower growth and lasting success.

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