

Merging Information Technology – An Organized Approach

Merging IT Organizations

The Merging of IT Organizations as a result of Business Mergers and Acquisitions requires improvement and integration of many levels, both technologically and culturally. An organized, methodical and prioritized approach is required to manage change, processes, organizational modification and technology.

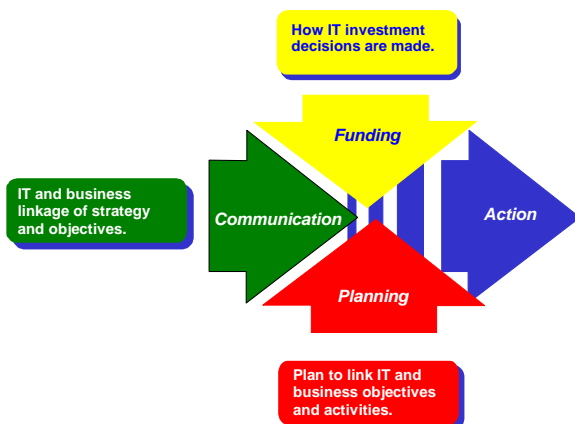
This detailed overview provides a discussion of Jefferson's experience and services and can be adapted to support these initiatives.

A Merging IT organization must first focus on the merging of the business, regardless of size. Those business units that are merging functions must have first priority. Primary steps to be considered are:

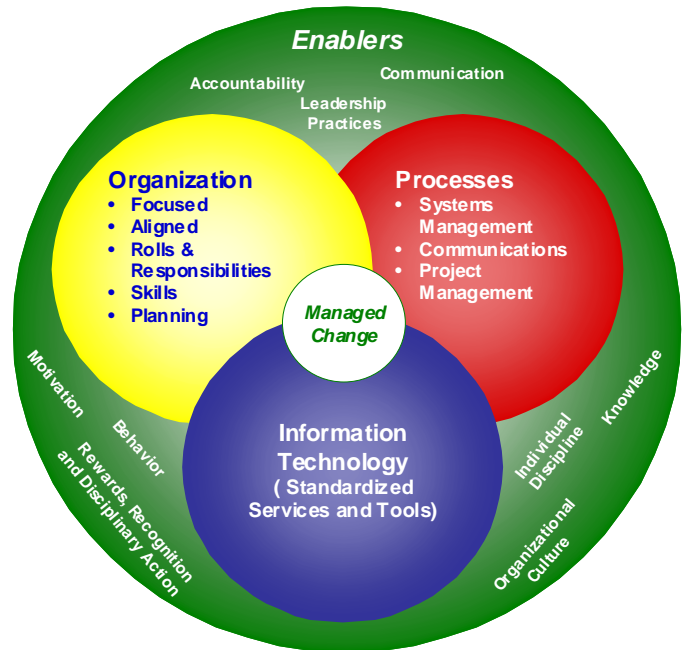
- **Concrete Understanding** - by the executive staff of what business units require merging and which do not.
- **Statement of Values** - the joint IT organization must have (taking the best of both) to support and align with the joined business units.
- **IT Strategy** - to articulate the applications, technology and infrastructure that must merge to support the merged business units.
- **Process Improvement** - initiatives to correlate and streamline common processes critical to joint IT performance.
- **Managed Change** - initiatives to modify employee and leadership behavior to support joint operations.

One – Business and IT Alignment

A strategic plan, to the prioritized initiative level, must be constructed and communicated to all employees and leadership. This plan will address five areas of importance. (See [Methodology on Strategic Information Planning](#).) Aligning the strategies and operational plans of IT and their internal customers is the most important issue for merged organizations. IT has the potential not only to support chosen business strategies but also to shape them. The four ingredients of alignment are Planning, Communications, Funding and Action.



Normally in a merged organization, processes and technology are in no state to be merged quickly and quietly. The optimal approach is to view the organizations as a Process Centric unit and integrate plans and initiatives to align the two organizations.



Applications and Development organizations (with the exception of those supporting merged business units) can maintain their autonomy. However, they must change their integration and communication with merged IT units such as operations (or Infrastructure).

Two – Organization

A focused organization with practiced, dedicated and informed leadership is most important to the organization and its structure. Leaders that communicate, plan and offer a strong sense of teamwork are critical to joining two organizations. They must be picked carefully and with the defined values in mind.

A skill inventory along with strong Roles and Responsibilities must be enforced. Along with the “soft” skills to shape employee behavior- *Appreciation, Recognition, Roles & Responsibilities, Compensation, Disciplinary Actions, and Personal and Technical Growth* – necessary to the attaining and retention of skilled IT resources.

Three – Process Management

Organizations often have conflicting or missing Systems Management and Non-Systems Management processes. Processes critical to the operation of an Infrastructure organization are:

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System Management Processes

- Asset Management
- Availability Management
- Backup and Recovery
- Change Control
- Help Desk/User Support
- Performance and Capacity Planning
- Platform Operations
- Problem Management
- Critical Problem Detection and Management
- Security Management

Non-System Management Processes

- Communications
- Design and Implement Services
- Program Management
- Resource Management
- Service Level Management

These processes must be prioritized based upon critical resources and the needs of external organizations. (See the Jefferson's publication – Process Management).

Four – Information Technology Services

The third aspect of the Process Centric model is the technical services provided to the business. These services (most commonly known as Systems Services) are the backbone of providing technology may be grouped into the following broad categories.

Application Environment

- Business Applications
- Development Services
- Shared Applications
- Data Services

Distribution and Communication

- Presentation Services
- Common Services
- Data Services

Foundation

- Interface Services
- Network Services

Delivery

- Operating Systems
- Systems Management Services
- Hardware (Workstation, Servers, Special)

Jefferson Blueprint

Jefferson has a copyrighted approach and methodology to “normalize” the Systems Services and management of the services (Processes and Procedures). Creating a database matrix with services at one axis and processes at the other completes this effort and provides Service Element definitions at the juncture of the many cells. The **Jefferson (Systems Services) Blueprint** aids an organization by providing:

- **Required Principles and Policies** - that do not exist or need refinement.
- **Comprehensive IT Architecture** – identifying technical components that are redundant and required.
- **Procedures Definition** – identifying those that exist, are missing or inadequate.
- **Prioritized Systems Management Processes** - workflow groups and workflows at a defined level of maturity.
- **Identified Responsibilities** - Group, Team and Individual responsibilities for specific technical products and their management procedures.
- **Classification of Technical Components and Service offerings**
- **Resource Management** - Persons responsible for both the procedures and service at its juncture.
- **Correlate Services to Procedures** - processes to responsible individuals, teams and groups.
- **Verify Operational Staffing Levels** - to execute procedures, activities, workflows or processes to individual or groups of services.
- **Manage Costs** - The ability to provide the cost of supporting each technical component or service.

Five – Managed Change

Critical to emerging or changing environments, Managed Change addresses the behavioral aspects to complete a merger, create a Process Centric organization and manage culture.



A major merger requires a revolution in implementing these key areas. The two major factors causing a Process Centric approach not to succeed: lack of support from leadership and the natural resistance of employees to change. A Managed Change approach integrated with the four other areas is critical

The Jefferson team is comprised of world-class consultants with the expertise, depth and commitment to provide these solutions and methodologies and to partner with our customers.