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M&A IT Integration Checklist: Exchange Online

This checklist is designed for Office 365 Exchange Online integration projects related to an M&A. 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 to serve as a reminder of the big items to consider in your planning and to spur discussion.

The whole point of this checklist is to have a conversation about the business well enough to understand which one of these things in the checklist 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 (as 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, the 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 establishing performing a thorough RAID management discussion (see Figure 1) and 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 things go 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   A   I   D

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.

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.

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

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

Office 365 Tenant and Network Readiness

Component	Owner	Valid (Y/N)	Notes
Active Office 365 Tenant with Exchange Online Licensing Plan			
External DNS			
Inbound mail routing			
Outbound mail routing			
3rd party certificates			
Network capacity			
Firewall			
Identities			
Azure AD connect*			
On-premises AD*			
Authentication			

Note: *Required to support hybrid identity type

Security and Data Compliance

Component	Owner	Valid (Y/N)	Notes
Data retention, archive, legal hold policies			
SPAM and data protection			
Protocols			
Device access			
Mobile device management*			
Multi-Factor authentication*			
Conditional access*			
Privileged access			

Note: *Optional based on Security Policies

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Component	Owner	Valid (Y/N)	Notes
Migration Manager for AD			
Directory sync jobs			
Recovery Manager for AD			
Domain Migration Agent (MMAD O365)			
Migration Manager for Exchange			
Enterprise Reporter			
On Demand Recovery for Azure AD			
On Demand 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 GAL/Free busy/Public Folder/Delegation			

LD1 communication and collaboration

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

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Installation, preparation and configuration

Component	Owner	Valid (Y/N)	Notes
Implement provisioning & administration changes			
Implements 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 mailboxes			
Synchronize key data			
Synchronize availability data			
Legacy access (enable legacy exchange DN support)			
Migrate resource/shared mailboxes			
Migrate public folders			

Post-migration

Update Outlook profiles			
Update mobile devices			
Final cleanup & decommissioning			

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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 and responsibilities			
Communications plan			
Training			
Governance requirements			

Exchange Online management

User/shared/resource mailbox provisioning and deprovisioning			
Dynamic and static DL management			
Office 365 licensing			
Public folder management			
Office 365 group management			
Delegation			
Data/SPAM protection			

Device Access management

Outlook client settings			
Mobile device			
Outlook on the web			
Exchange web services/application impersonation			
Certificates			
Endpoint protection			

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ABOUT QUEST® M&A SOLUTIONS

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.

ABOUT QUEST

Quest provides software solutions for the rapidly changing world of enterprise IT. We help simplify the challenges caused by data explosion, cloud expansion, hybrid data centers, security threats and regulatory requirements. Our portfolio includes solutions for database management, data protection, unified endpoint management, identity and access management and Microsoft platform management.

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