CIO Post M&A

PLAYBOOK

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01

Executive Summary

Mergers and acquisitions are among the most complex events a company can face. While the business case often highlights growth, synergy, and competitive advantage, the reality is that many M&As fail to deliver their promised value. A leading cause of this failure is **poor IT integration.** Systems remain fragmented, users struggle with access, costs spiral due to duplication, and the business loses confidence in IT leadership. As CIO, you are uniquely positioned to prevent these pitfalls. You are not just a technology leader — you are the **strategic bridge between business goals and technical execution.** In the critical first 90 days after a merger, your actions will shape whether IT is viewed as a bottleneck or as the engine that powers the new organization forward.

This playbook exists to give you clarity and confidence in that role. It is designed to help you:

- **Communicate effectively with executives** by framing IT integration in business terms — continuity, cost savings, risk reduction, and scalability.
- **Direct your IT team with confidence**, giving them the mission clarity, tools, and guidance they need to execute without hesitation.
- **Ask the right questions** of executives, IT leaders, business units, and vendors to uncover blind spots and align priorities.
- **Make informed decisions** about whether to stabilize with short-term integration or commit to long-term consolidation.
- **Deliver results quickly**, showing measurable wins in business continuity, risk management, and cost savings within 90 days.

The **dream outcome** for every CIO post–M&A is clear:
- A **unified IT environment** where employees and customers experience seamless operations.
- **Zero disruption** to business functions during the transition.
- A **secure, compliant infrastructure** that protects data and reduces exposure.
- **Optimized costs** by eliminating redundant systems and licenses.

- **Executive confidence** that IT is not just keeping pace but driving synergy.
- A **future-ready foundation** for the next wave of business growth and acquisitions.

By following this playbook, you will have the tools, frameworks, and strategies needed to achieve this outcome. It balances **what you must achieve** with **how you should do it** — giving you both the leadership narrative and the practical execution steps required to succeed.

SECTION

02

Communicating with Executives

After a merger, one of the CIO's most visible responsibilities is to maintain executive confidence. The CEO, CFO, COO, and board are not looking for technical updates about directory synchronization or Group Policy migrations. What they care about is whether the business will continue to operate without disruption, whether promised synergies are being realized, whether the organization remains secure and compliant, and whether there is a clear plan with measurable progress. If IT can consistently deliver that reassurance, it will be viewed as a strategic enabler of the merger. If not, IT risks being seen as the barrier that prevents value creation.

The CIO's communication should always focus on four themes: continuity, synergy, risk, and roadmap. The most effective way to convey these themes is through a combination of clear messaging and simple, repeatable artifacts. Executives process information quickly, so the goal is not to overwhelm with detail but to show them structured progress at a glance.

The CIO Executive Dashboard

Executives want clarity, and nothing provides that better than a one-page dashboard. This artifact should track the four key areas of integration — identity and access, applications and infrastructure, security and compliance, and cost and synergy. Each area should include a simple red, yellow, or green status, a key metric, and a short business summary.

AREA	STATUS	KEY METRIC	BUSINESS SUMMARY
Identity & Access		95% of users synchronized via Entra Connect	95% of users synchronized via Extra Connect Employees can access both legacy systems with single sign-on
Application & Infra		12 of 15 critical apps validated	Three apps pending remediation, all with workarounds

AREA	STATUS	KEY METRIC	BUSINESS SUMMARY
Security & Compliance		100% MFA enforced, no high-risk gaps	Compliance readiness confirmed for Q2 audit
Cost & Synergy		$800K savings realized of $1.2M target	License consolidation underway, full savings expected in 60 days

This dashboard ensures that executives can see status and business impact immediately, without needing to interpret technical jargon.

The Risk Snapshot

Executives need visibility into risks, but they do not want to review a 30-page risk register. A focused risk snapshot that shows the top three risks, their impact, mitigation plan, owner, and status keeps the message simple while demonstrating that IT is proactive and in control.

RISK	BUSINESS IMPACT	MITIGATION PLAN	OWNER	STATUS
Duplicate O365 tenants	Costs $200K/month in overlap	Consolidation project in progress, completion in 60 days	CIO + CFO	In Progress
Mail routing misconfig	Could disrupt email for 2,000 staff	Backup routing and monitoring in place	IT Director	Mitigated
Legacy AD trust conflict	Failed logins for 500 users	Federation reconfigured, issue resolved	Architecture	Closed

By consistently presenting risk in this format, the CIO sends a strong message: risks are known, they are being managed, and there are owners accountable for resolution.

The ROI Snapshot

The CFO and board expect to see financial results from IT integration. A simple ROI snapshot tracks projected savings versus realized savings across major categories.

CATEGORY	PROJECTED SAVINGS	REALIZED SAVINGS	STATUS
O365 license reduction	$1,200,000	$800,000	In Progress
Security tool overlap	$500,000	$200,000	Planned
Data center hosting	$2,500,000	$0	Pending
TOTAL	**$4,200,000**	**$1,000,000**	

This view makes financial performance transparent and ties IT integration directly to the merger's value case.

The 30/60/90–Day Roadmap

Executives want to see not just where things stand today, but where they are going next. A 30/60/90 roadmap lays out a phased journey, each stage tied to business outcomes.

Day 1–30 (Stabilize / Bridge)

- Directory synchronization established → Ensures user continuity
- Mail routing configured → No email disruption

- SSO federation enabled → Single login experience
- Risk and readiness assessment complete

Day 1–30 (Stabilize / Bridge)

- 2,000 users migrated → Unified identity management
- Group Policies aligned → Reduced login errors by 40%
- Pilot application cutovers executed → Validated continuity
- DNS and DHCP reconfigured → Infrastructure unified

Day 61–90 (Transform / Elevate)

- Application portfolio rationalized → Redundant apps decommissioned
- License consolidation report → Delivered $1.2M savings
- Governance framework launched → Lifecycle management in place
- Future-ready IT vision presented to executives

This roadmap shows momentum and links technical activities directly to measurable business impact.

Executive Talking Points

To ensure consistency in every conversation, the CIO should prepare a short set of talking points that can be adapted week by week.

- Continuity: "Business continuity remains stable with no major incidents this week."
- Progress: "Identity and mail coexistence are in place, enabling secure access across both environments."
- Risk: "The top risk is duplicate O365 tenants costing $200K per month. The consolidation project is on track to complete in 60 days."
- Financials: "We have realized $800K of the projected $1.2M in savings from license consolidation."
- Roadmap: "We completed our day 30 stabilization phase on schedule. User migrations begin next week."
- Close: "We remain on track to deliver the IT synergies that align with the CFO's cost reduction goals."

Disclaimer

The examples of dashboards, risk snapshots, ROI trackers, and roadmaps provided in this playbook are intended only as templates. Each CIO must work closely with their IT leadership team to populate these artifacts with accurate and current data specific to their environment. The structure and format are repeatable, but the content must reflect the reality of your systems, risks, financials, and milestones.

Putting It All Together

Cadence and consistency matter. Weekly 15–20 minute updates with the CEO and CFO using the dashboard, risk snapshot, ROI tracker, and roadmap will build confidence. Monthly board updates should emphasize higher-level summaries with a focus on value delivered. Urgent risks should be communicated immediately, but always in terms of business impact, not technical jargon.

By using these artifacts consistently, the CIO transforms communication from a technical status report into a strategic narrative. Executives gain a clear view of progress, risks, and financial outcomes, and they begin to view IT not as a cost center, but as a disciplined, reliable driver of merger success.

SECTION

03

Communicating with the IT Team

Why This Matters

While executives care about high-level outcomes, the IT team cares about clarity, direction, and support. After a merger, uncertainty can easily drain morale. Without a clear mission, defined roles, and trusted tools, teams can become reactive, overworked, and stressed. The CIO's role is to remove that uncertainty, provide direction, and create an environment where IT leaders and staff know what is expected of them and how their work connects to the success of the merger.

When communication with the IT team is strong, staff feel aligned, empowered, and confident. When it is weak, teams resort to guesswork, duplication of effort, and firefighting.

How to Communicate with the IT Team

Effective communication with the IT team means combining **clear vision with practical guidance.** The CIO should:

1. Set the Mission Early

Begin with a kickoff session where you explain the overarching mission: "Our goal is to keep the business running smoothly while building a unified and secure IT foundation." Connect their work directly to the business outcome so they understand why their role matters.

2. Define Workstreams and Roles

Break the integration effort into focused workstreams such as Identity and Access, Infrastructure, Applications, Security, and End-User Support. Assign ownership clearly. This prevents duplication and ensures accountability.

3. Provide Playbooks and Runbooks

Teams must not be left to figure things out on their own. Provide structured migration playbooks, triage procedures, and checklists. These give staff confidence and reduce errors.

4. Establish Escalation Paths

Define exactly how problems should be escalated. For example, "Incident → Team Lead → IT Director → CIO." Make sure everyone knows where to go for help.

5. Maintain Regular Cadence

Daily standups during critical migration weeks keep everyone aligned. Weekly leadership check-ins allow directors to report progress and risks. Communication should be predictable and consistent.

6. Recognize Contributions

Acknowledge wins, even small ones. Recognizing the team's effort reduces fatigue and reinforces morale during a stressful period.

Supporting Artifacts for IT Team Communication

To make communication clear and actionable, the CIO should use simple artifacts tailored to the team's needs.

1. Roles & Responsibilities Matrix (RACI Model)

This artifact clarifies who is responsible, accountable, consulted, and informed for each workstream.

WORKSTREAM	RESPONSIBLE (R)	ACCOUNTABLE (A)	CONSULTED (C)	INFORMED (I)
Identity & Access	Identity Lead	CIO	Application SMEs	IT Directors
Infrastructure (DNS, DHCP, GPOs)	Infra Lead	IT Director	Security Lead	Team Members
Applications	App Migration Lead	CIO	BU Application Owners	End Users
Security & Compliance	Security Lead	CISO	Legal/Compliance	IT Team
End-User Support	Helpdesk Lead	IT Director	HR / Comms	All Employees

This table should be shared during kickoff and kept visible throughout the program.

2. Escalation Workflow

A simple diagram or chart prevents confusion during crises:

- **Tier 1:** Team Lead handles immediate incident.
- **Tier 2:** Escalate to Workstream Lead (e.g., Identity Lead, Infra Lead).
- **Tier 3:** IT Director resolves if issue spans multiple workstreams.
- **Tier 4:** CIO engaged for critical business-impacting decisions.

This makes sure issues are handled at the right level and that the CIO is only pulled in when necessary.

3. IT Team Update Template (Weekly Memo)

A brief, consistent memo keeps the team aligned without overwhelming detail.

Subject: Weekly IT Integration Update – Week of [Date]
- **Mission Reminder:** "Our priority remains keeping systems stable while progressing toward consolidation."
- **Progress This Week:** "Directory sync established, 500 users validated in pilot migration."
- **Current Risks:** "Two legacy apps not authenticating properly; remediation plan in progress."
- **Next Week's Focus:** "Scaling migrations to 1,000 users, finalizing Group Policy alignment."
- **Recognition:** "Thanks to the Infra team for completing mail routing with zero downtime."

This format builds rhythm and predictability, while recognition boosts morale.

4. Day 1 Priorities Checklist

A short checklist ensures everyone knows the immediate priorities:
- Directory synchronization configured
- Mail routing between environments tested
- Federation and SSO enabled

- Critical apps validated for authentication continuity
- End-user communication distributed (login instructions, FAQs)

Disclaimer

The artifacts included here — RACI matrices, escalation workflows, update templates, and checklists — are provided as examples. Each CIO must work with their IT leadership team to tailor these tools to the actual people, systems, risks, and dependencies in their environment. The value is in the structure and consistency, not the placeholder data shown.

Putting It All Together

Communicating with your IT team is about creating clarity and confidence in a time of uncertainty. Use kickoff sessions to establish the mission. Break work into defined streams with clear roles. Provide structured playbooks and escalation paths so no one is left guessing. Reinforce alignment through regular updates and recognize contributions to keep morale strong. By using artifacts such as role matrices, escalation charts, update templates, and checklists, you give your team a practical framework to execute with discipline. When the IT team feels supported and organized, they become a force multiplier in delivering the merger's success.

04

SECTION

Key Questions Every CIO Must Ask

Why This Matters

The strength of a CIO's leadership after a merger often comes down to asking the right questions. In a complex integration, assumptions can be dangerous. Executives may assume risks are covered. IT leaders may assume priorities are aligned. Business units may assume critical applications will continue to work. Vendors may assume their contracts will remain untouched. If these assumptions go unchallenged, blind spots grow into costly disruptions.

The CIO's role is not only to deliver technical execution but also to uncover risks, align priorities, and surface critical information that others may not volunteer. Asking the right questions — early and consistently — builds clarity and helps set expectations at every level of the organization.

How to Use Questions Strategically

The CIO should approach questions as tools to:

- **Frame alignment with executives:** Understand their tolerance for risk, cost savings expectations, and strategic priorities.
- **Guide IT leadership:** Identify technical gaps, dependencies, and risks in execution.
- **Connect with business units:** Learn which workflows, applications, and processes are critical to daily operations.
- **Engage vendors and partners:** Expose opportunities for savings, overlap, and support that might otherwise be overlooked.

Questions should be asked in structured sessions, not casually. Use **executive alignment meetings, IT readiness workshops**, and **business unit interviews** to capture answers in a formal way. Document everything and revisit answers as conditions change.

Example CIO Question Bank

To Executives

These questions align IT with business strategy, risk appetite, and financial goals.

- What level of disruption to employees or customers is acceptable during the transition?
- What cost savings targets have been promised to the board and shareholders, and on what timeline?
- Which business capabilities are highest priority to maintain or improve during the integration?
- Are there regulatory or compliance deadlines that IT must meet immediately?
- What level of visibility do you want into IT progress — weekly dashboards, monthly board updates, or both?
- Which KPIs matter most to you for IT success (uptime, cost reduction, user productivity, risk reduction)?
- How should IT balance cost savings against investments in modernization?
- Do you expect IT to deliver only integration or also long-term transformation?

To IT Leadership

These questions expose technical risks, readiness gaps, and dependencies.

- Have all user identities, groups, and access rights been mapped across environments?
- Which applications are mission-critical and must work on Day 1 without fail?
- Where are the greatest risks of downtime or data loss during migration?
- What dependencies exist between legacy systems that could block progress?
- Do we have an inventory of all applications, including shadow IT?
- Are our directory and federation services configured for cross-domain access?
- Do we have sufficient tools, automation, and staff resources to execute migration at scale?
- What issues did we encounter in pilot migrations, and how are they being mitigated?
- Are our backup and rollback plans ready if something goes wrong during cutover?

To Business Units

These questions ensure IT understands the operational realities that drive business continuity.

- What applications or workflows are essential to your daily operations?
- Which systems absolutely cannot fail on Day 1 of the merger?
- Where are you experiencing pain points today that the integration could worsen?
- Are there duplicate tools between your business unit and the other organization (CRM, HR, ERP)?
- What manual workarounds do your teams currently use that depend on IT systems?
- Are there customer-facing processes that rely on legacy platforms we must preserve temporarily?
- How do you measure productivity in your team, and how could IT disruptions impact it?
- Which leaders in your business unit should IT contact if issues arise during cutovers?

To Vendors and Partners

These questions help uncover contract overlaps, cost-saving opportunities, and migration support.

- Do we have overlapping or duplicate contracts across the merged organizations?
- What is the renewal timeline for current licenses, and can they be consolidated?
- Can we renegotiate terms now that the organization is larger?
- What migration or transition support can you provide as part of the existing contract?
- Do you have tools or accelerators that could reduce migration effort or risk?
- Are there hidden costs (support fees, license minimums, penalties) if we don't consolidate quickly?
- How do you handle environments that are in coexistence for an extended period?
- Can you provide a dedicated liaison during the migration?

Supporting Artifacts for the CIO's Question Framework

1. CIO Question Bank Template

A table that captures some questions, their answers, and the implications for action.

STAKEHOLDER	QUESTION	RESPONSE	IMPLICATION FOR CIO ACTION
CFO	What cost savings are expected in 90 days?	$3M in licensing and hosting cuts	CIO must prioritize license consolidation over infra upgrades
IT Director	Which apps must work on Day 1?	ERP, Payroll, CRM	Build "Day One Must Work" checklist
BU Lead (Ops)	Which workflows are most critical?	Call center & customer portal	Prioritize authentication continuity for customer-facing apps
Vendor (MSFT)	Are licenses overlapping?	Yes, 1,200 duplicate O365 licenses	Consolidation project with CFO & vendor in next 60 days

2. Business Unit "Day One Must Work" Checklist

A simple diagram or chart prevents confusion during crises:

- Tier 1: Team Lead handles immediate incident.
- Tier 2: Escalate to Workstream Lead (e.g., Identity Lead, Infra Lead).
- Tier 3: IT Director resolves if issue spans multiple workstreams.
- Tier 4: CIO engaged for critical business-impacting decisions.

This makes sure issues are handled at the right level and that the CIO is only pulled in when necessary.

3. CIO Alignment Tracker

A one-page summary for executives showing the top five questions answered and their agreed outcomes.

QUESTION	EXECUTIVE ANSWER	AGREED ACTION
What downtime is acceptable?	Maximum of 2 hours	IT plans cutovers outside of business hours
What savings are expected?	$3M in 90 days	License and hosting consolidation prioritized
What compliance deadlines exist?	HIPAA audit in 60 days	Security and compliance checks accelerated
Which business priority first?	Customer portal availability	Customer access continuity placed at top of roadmap
What is IT's strategic role?	Deliver synergies quickly	CIO to report ROI snapshot bi-weekly

Disclaimer

The artifacts included here — RACI matrices, escalation workflows, update templates, and checklists — are provided as examples. Each CIO must work with their IT leadership team to tailor these tools to the actual people, systems, risks, and dependencies in their environment. The value is in the structure and consistency, not the placeholder data shown.

Putting It All Together

Communicating with your IT team is about creating clarity and confidence in a time of uncertainty. Use kickoff sessions to establish the mission. Break work into defined streams with clear roles. Provide structured playbooks and escalation paths so no one is left guessing. Reinforce alignment through regular updates and recognize contributions to keep morale strong. By using artifacts such as role matrices, escalation charts, update templates, and checklists, you give your team a practical framework to execute with discipline. When the IT team feels supported and organized, they become a force multiplier in delivering the merger's success.

SECTION

05

Cost vs Value Framework

Why This Matters

One of the most difficult decisions a CIO faces after a merger is whether to maintain **integration (coexistence)** or push for **consolidation (full unification)**. Integration keeps systems running side by side, stabilizing operations in the short term. Consolidation eliminates redundancy and creates one unified environment, but it requires more upfront cost, effort, and coordination.

The choice between integration and consolidation is not just technical. It has profound implications for cost, risk, executive expectations, and future scalability. A CIO who cannot clearly articulate the trade-offs risks being seen as indecisive or reactive. A CIO who frames the choice in terms of cost, value, and scalability earns credibility and provides executives with the clarity they need to make informed business decisions.

How to Compare Integration vs Consolidation

The CIO should approach the decision as a structured cost vs value analysis. This means:

1. **Calculate the True Cost of Integration**
   a. Include not only short-term stabilization costs, but also the hidden costs of maintaining duplicate licenses, systems, and staff effort over 12–24 months.
2. **Estimate the Value of Consolidation**
   a. Quantify long-term cost savings from eliminating duplicates, reducing support overhead, and improving productivity through unified systems.
3. **Assess Risk Exposure**
   a. Integration often creates more complexity and higher risk surfaces, while consolidation reduces these over time. The CIO must highlight these differences.
4. **Factor in Future Scalability**
   a. Integration may stabilize the present, but it rarely scales well when future acquisitions occur. Consolidation provides a foundation for repeatable, efficient growth.
5. **Present a Hybrid Roadmap**
   a. In most cases, the answer is not one or the other, but both. Stabilize with short-term integration, then move toward consolidation once operations are steady.

Supporting Artifacts

1. Cost vs Value Comparison Matrix

This matrix helps executives visualize trade-offs.

CATEGORY	INTEGRATION (COEXISTENCE)	CONSOLIDATION (UNIFIED ENVIRONMENT)
Upfront Cost	Lower	Higher
Ongoing Cost	Higher due to duplicate licenses and support	Lower due to elimination of redundancy
Risk	Higher (complexity, multiple systems)	Lower (single environment, less exposure)
Business Continuity	Fast stabilization	Requires careful cutovers but stable long-term
User Experience	Multiple logins, inconsistent access	Single sign-on, unified experience
Compliance	More gaps and overlaps	Easier to enforce and govern
Scalability	Poor for future acquisitions	Strong foundation for future M&A
Executive Perception	Tactical, temporary	Strategic, value-driving

2. TCO (Total Cost of Ownership) Model Template

A simple financial template the CIO can adapt with Finance.

COST CATEGORY	INTEGRATION (12 MONTHS)	CONSOLIDATION (24 MONTHS)
Licensing (duplicate O365, CRM, etc.)	$1,200,000	$400,000
Infrastructure (servers, hosting)	$1,000,000	$500,000
Staff support costs	$800,000	$500,000
Risk exposure / compliance penalties	$500,000 (est.)	$200,000 (est.)
Migration project cost	$300,000	$1,200,000
Total	$3,800,000	$2,800,000

This shows that while consolidation may cost more upfront, its total cost over 24 months is lower and its value higher.

3. Scalability Assessment Checklist

This tool helps the CIO illustrate how each option supports future growth.

- Can new acquisitions plug into the environment easily?
- Will identity and access remain manageable as scale increases?

- Is the compliance framework sustainable across multiple entities?
- Will we avoid license sprawl and cost duplication?
- Can IT deliver faster integrations for future M&As?

Integration scores low on most of these; consolidation scores high.

Disclaimer

The cost vs value comparisons provided here are examples. Actual figures will vary significantly based on the size of the organization, the number of users, licensing agreements, and technical complexity. CIOs must work closely with Finance, Procurement, and IT leadership to build accurate models. The structure provided in this playbook is meant to guide the conversation, not replace detailed financial analysis.

Putting It All Together

By framing the choice between integration and consolidation in terms of cost, value, risk, and scalability, the CIO positions IT as a strategic decision-maker rather than a technical operator. Using structured artifacts like a comparison matrix, TCO model, and scalability checklist, the CIO can show executives the trade-offs clearly and justify a hybrid approach: stabilize with integration in the short term, then move to consolidation for long-term value. This approach builds executive trust and ensures IT is recognized as the driver of sustainable merger success.

SECTION

06

90-Day Roadmap

Why This Matters

The first 90 days set the tone for the merger. If IT keeps the lights on, ensures stability, and delivers visible wins, executives will trust the CIO and the IT team. If there are disruptions, missed deadlines, or unclear progress, IT will be viewed as a liability.

A 90-day roadmap is not about doing everything — it is about doing the right things in the right order. By focusing on stabilization first and then consolidation, the CIO provides structure, manages expectations, and creates confidence at every level of the business.

How to Build and Manage the Roadmap

The CIO should break the 90-day plan into **two phases that reflect achievable outcomes:**

Phase 1: Day 1–30 – Stabilize (Bridge)

The first 30 days are about **continuity and trust**. If employees cannot access their systems, email does not work, or customers face downtime, the merger is immediately perceived as a failure. To avoid this, the CIO must focus on stabilization through coexistence.

Key activities for stabilization:
- **Directory synchronization and federation:** Configure trusts and synchronization between Active Directory environments (or equivalent) so identities work across both organizations.
- **Mail routing continuity:** Ensure mail flows seamlessly between organizations, even if full mailbox migration has not occurred. Employees must be able to communicate without interruption.
- **Single sign-on (SSO):** Enable federation so employees can log in once and access systems across both environments where possible.
- **Readiness and risk assessments:** Conduct technical assessments to understand identity, infrastructure, and application dependencies. Map risks and begin mitigation planning.
- **User communication:** Publish FAQs, quick guides, and updates so staff know what to expect and where to get help.

Deliverables for executives in this phase:
- Proof that no critical disruptions have occurred.
- Dashboard showing green/yellow/red status of identity, mail, and applications.
- A list of risks identified and the mitigation plans in progress.

Deliverables for the IT team in this phase:
- Playbooks for directory sync, mail routing, and federation.
- Escalation workflows for incident response.
- Daily standups to monitor stabilization progress.

Phase 2: Day 31–90 – Consolidate (Fuse)

Once stability is in place, the CIO must begin showing value through consolidation. This phase focuses on reducing duplication, simplifying environments, and delivering early financial wins.

Key activities for consolidation:
- **Pilot migrations:** Migrate a small group of users (e.g., 500) to validate process, tools, and support workflows.
- **Scaled migrations:** Expand migrations in controlled waves (e.g., 1,000–2,000 users per wave) once pilots succeed.
- **Group Policy alignment:** Migrate and align Group Policies to ensure consistent user experience and access controls.
- **Infrastructure alignment:** Standardize supporting services such as DNS and DHCP across environments.
- **Application validation:** Confirm that business-critical applications continue to authenticate and perform properly post-migration.
- **Cutover support:** Provide triage teams and "war room" escalation during migration waves to quickly address issues.
- **Financial savings delivery:** Consolidate duplicate licenses (e.g., O365, security tools) to deliver early savings and provide executives with an ROI snapshot.

Deliverables for executives in this phase:
- Report on number of users successfully migrated.
- ROI snapshot showing savings realized from license consolidation.
- Dashboard showing progress against 90-day milestones.

Deliverables for the IT team in this phase:
- Migration runbooks and checklists.
- Pilot feedback incorporated into scaled migrations.
- Triage documentation and escalation procedures.

Supporting Artifacts for the 90-Day Roadmap

1. 90-Day Timeline Visual

PHASE	TIMEFRAME	KEY OUTCOMES
Stabilize	Day 1–30	Continuity secured: directory sync, mail routing, SSO, readiness assessment
Consolidate	Day 31–90	Unified environment in progress: user migrations, policy alignment, infrastructure unified, early cost savings delivered

2. Milestone Tracker (Detailed)

MILESTONE	DUE DATE	OWNER	STATUS	BUSINESS IMPACT
Directory sync established	Day 10	Identity Lead	Complete	Employees can access both environments securely
Mail routing configured	Day 15	Infra Lead	Complete	Email continuity preserved for all employees

MILESTONE	DUE DATE	OWNER	STATUS	BUSINESS IMPACT
SSO federation enabled	Day 20	Identity Lead	In progress	Reduces need for multiple logins, improves productivity
Risk and readiness assessment	Day 25	Security Lead	In progress	Identifies gaps and informs cutover planning
Pilot migration (500 users)	Day 40	Migration Lead	Planned	Validates migration tools and user experience
2,000 users migrated	Day 60	Migration Lead	Planned	Early consolidation milestone
Group Policies aligned	Day 70	Infra Lead	Planned	Consistent access and security enforcement
ROI snapshot delivered	Day 85	CIO + CFO	Planned	Demonstrates early financial value
Final 90-day review	Day 90	CIO	Planned	Provides roadmap for next phase of integration

3. Cutover Readiness Checklist (Expanded)

Before any user migration wave, ensure the following are complete:

- End-user communication sent with clear instructions and timing.
- Helpdesk briefed with FAQs and escalation procedures.
- Backup and rollback plans tested and validated.
- Pilot group completed and feedback incorporated.
- Application authentication tested for migrated users.

- Triage support team scheduled for cutover day.
- "Go/No-Go" review conducted with stakeholders, with explicit sign-off.

Disclaimer

The roadmap, milestones, and checklists in this section are **examples** designed to illustrate structure and approach. Each CIO must adapt these to their specific environment, business needs, and technical constraints. Dependencies such as the number of users, systems, and available resources will shape the actual timelines and deliverables. The value of these artifacts lies in providing a disciplined, repeatable framework that CIOs can tailor to their organization.

Putting It All Together

The 90-day roadmap balances **stability and progress.** In the first 30 days, IT proves it can maintain business continuity. In the next 60 days, IT demonstrates value through controlled consolidation and early financial wins. By using artifacts such as the timeline, milestone tracker, and readiness checklist, the CIO makes progress transparent to executives and actionable for IT leaders. The result is a structured, achievable plan that builds confidence across the organization and positions IT as a driver of merger success.

SECTION

07

Risk Management & Governance

Why This Matters

Every merger creates risk. IT risks are often the most visible because they can impact the entire organization — from employees losing access to systems, to customers being locked out of portals, to regulators imposing fines for compliance violations. Executives assume that the CIO has these risks under control. If a risk materializes without warning, confidence in IT leadership can erode quickly.

Governance is equally important. Without a clear governance model, decisions about identity, access, applications, and infrastructure can become chaotic, with different teams making ad hoc choices. This creates inconsistencies, duplicated effort, and potential security gaps. Strong governance ensures accountability, transparency, and alignment across IT and business units.

The CIO must therefore implement a dual strategy: proactively manage risks while establishing lightweight but effective governance.

How to Manage Risk

Risk management during post-merger integration should follow a consistent cycle: **identify → assess → mitigate → communicate.**

1. **Identify Risks Early**
   a. Run risk workshops with IT leadership, security, and business units. Ask: "What could go wrong?" Capture everything from login failures to compliance violations.
2. **Assess Severity and Likelihood**
   a. Use a simple framework to rate each risk as high, medium, or low based on business impact and probability. This prevents overreaction to minor issues and ensures focus on what matters most.
3. **Mitigate with Ownership**
   a. Assign each risk to an owner and track mitigation steps. For example, a "duplicate O365 tenant" risk may be owned jointly by the CIO and CFO, with mitigation tied to a consolidation project.
4. **Communicate Transparently**
   a. Present risks to executives in plain business terms, paired with mitigation strategies. Communicate progress weekly to demonstrate control.

How to Establish Governance

Governance after a merger must be **practical, not bureaucratic.** The CIO should:
- **Create a lightweight IT governance board** made up of CIO, IT directors, security lead, and key business representatives.
- **Define decision rights:** Who approves system retirements, who owns compliance sign-off, who manages license consolidation.
- **Set intake and retirement processes:** Applications must have defined owners, business justification, and retirement plans.
- **Establish accountability** using a RACI model so roles are clear across IT and business.
- **Embed compliance** into every decision, ensuring regulatory requirements (HIPAA, SOX, GDPR, etc.) are part of governance reviews.

Supporting Artifacts

1. CIO Risk Dashboard

A one-page summary to track and communicate the top risks.

RISK	LIKELIHOOD	IMPACT	MITIGATION PLAN	OWNER	STATUS
Duplicate O365 tenants	High	High	License consolidation project in 60 days	CIO + CFO	In progress
Mail routing disruption	Medium	High	Backup routing plan tested	Infra Lead	Mitigated

RISK	LIKELIHOOD	IMPACT	MITIGATION PLAN	OWNER	STATUS
Failed user logins	Medium	Medium	Federation adjustments implemented	Identity Lead	Resolved
Compliance gap (HIPAA)	Low	High	Security audit scheduled for week 8	CISO	Open

2. Risk Mitigation Playbook Template

For each high-priority risk, build a short playbook with:
- **Description:** What is the risk?
- **Business Impact:** What happens if it occurs?
- **Trigger:** What event signals this risk is materializing?
- **Mitigation Steps:** What actions will reduce likelihood or impact?
- **Owner:** Who is accountable?
- **Escalation Path:** Who must be informed if the risk occurs?

Example:

Risk: Mail routing disruption between domains

Impact: 2,000 employees unable to send or receive emails

Trigger: Increase in undeliverable mail alerts > 50 per hour

Mitigation Steps:
- Configure backup routing via secondary MX record
- Test failover weekly
- Monitor mail queues daily during migration window
- **Owner**: Infra Lead
- **Escalation Path:** CIO → COO

3. Lightweight Governance Framework

A simple governance model that defines roles and responsibilities.

GOVERNANCE AREA	DECISION RIGHTS	ACCOUNTABILITY OWNER
Identity & Access	Approve directory trust, sync, SSO	CIO
Applications	Approve retirements or integrations	IT Director + BU Lead
Security & Compliance	Approve policy updates and exceptions	CISO
Infrastructure	Approve changes to core services (DNS, DHCP, GPOs)	Infra Director
Licensing & Contracts	Approve license consolidation, renewals	CIO + CFO

Governance meetings should be short and focused — ideally weekly during the first 90 days, then monthly once stabilization is achieved.

Disclaimer

The risk dashboard, mitigation playbook, and governance framework shown here are examples. Actual risks, owners, and governance models will vary depending on organizational size, systems, and compliance requirements. CIOs must work with their IT leadership, business stakeholders, and legal/compliance teams to ensure accuracy. These artifacts provide structure but must be tailored to reflect real-world conditions.

Putting It All Together

The 90-day roadmap balances **stability and progress.** In the first 30 days, IT proves it can maintain business continuity. In the next 60 days, IT demonstrates value through controlled consolidation and early financial wins. By using artifacts such as the timeline, milestone tracker, and readiness checklist, the CIO makes progress transparent to executives and actionable for IT leaders. The result is a structured, achievable plan that builds confidence across the organization and positions IT as a driver of merger success.

SECTION

08

Tools & Assets

Why This Matters

In a post-merger environment, communication and execution move at a rapid pace. The CIO cannot afford to reinvent documents or scramble for data before every executive meeting or migration cutover. Tools and assets give structure, consistency, and efficiency.

The right assets allow the CIO to:
- Speak to executives with confidence using clear, repeatable visuals.
- Enable IT teams with standardized runbooks that reduce errors.
- Demonstrate financial impact with calculators and dashboards.
- Keep employees and business units informed with polished communications.

Without these tools, updates become inconsistent, execution becomes ad hoc, and confidence in IT leadership begins to erode.

How to Use Tools & Assets

The CIO should organize tools into four categories:
1. **Executive Enablement Tools**
   a. Concise dashboards and briefing decks that help the CIO communicate value and progress to leadership.
2. **Technical Execution Tools**
   a. Runbooks, migration playbooks, and checklists that ensure IT teams execute consistently.
3. **Financial & ROI Tools**
   a. Calculators and savings trackers that show how IT is delivering value.
4. **Communication Tools**
   a. Templates for user updates, FAQs, and memos that keep the organization informed and reduce confusion.

By building these assets early, the CIO ensures smoother execution and more effective communication throughout the first 90 days.

Supporting Artifacts

1. Executive Briefing Deck (Example Structure)

A reusable 5-slide template for board or CEO updates:
1. **Continuity Update** – "All systems stable; no business disruptions this week."
2. **Dashboard** – Identity, Applications, Security, Cost & Synergy (R/Y/G).
3. **Top Risks & Mitigations** – Three key risks with owners and plans.
4. **ROI Snapshot** – Projected vs. realized savings (licenses, infra, tools).
5. **Next Milestones** – What will be achieved in the next 30 days.

This asset keeps every executive update short, predictable, and value-focused.

2. Technical Runbook Template

Runbooks give IT teams step-by-step instructions to execute migrations, cutovers, or configurations. Example structure:
- **Objective:** What this runbook covers (e.g., User Migration Wave 1).
- **Prerequisites:** Systems, tools, and teams required.
- **Steps:** Ordered list of actions with responsible roles.
- **Validation:** Tests to confirm success (e.g., login validation, app access).
- **Rollback Plan:** Exact steps to reverse if the cutover fails.
- **Escalation Path:** Who to notify in case of issues.

Runbooks reduce guesswork and ensure repeatable execution.

3. ROI Calculator (Sample Framework)

An Excel tool or simple table that tracks savings.

CATEGORY	BASELINE COST	PROJECTED SAVINGS	REALIZED SAVINGS	OWNER
O365 License Reduction	$2,400,000	$1,200,000	$800,000	CIO + CFO
Security Tool Overlap	$1,000,000	$500,000	$200,000	CISO

CATEGORY	BASELINE COST	PROJECTED SAVINGS	REALIZED SAVINGS	OWNER
Data Center Hosting	$5,000,000	$2,500,000	$0	Infra Lead
Total	$8,400,000	$4,200,000	$1,000,000	

This tool helps the CIO provide the CFO with quantifiable proof of IT's contribution to merger synergies.

4. Communication Templates

Communication reduces uncertainty and helps employees feel supported. Example templates:

- **Weekly IT Update Memo (for employees):**
  - "This week we completed mail routing configuration. Employees can now send and receive messages across both organizations without disruption. Next week we begin pilot migrations for 500 users. If you are part of this group, you will receive detailed instructions. No action is required for other employees at this time."
- **FAQ Sheet (for employees):**
  - Will I need a new login? – No, your existing credentials will continue to work.
  - What happens if I lose access? – Contact the IT Helpdesk at [contact info].
  - When will my mailbox move? – Only selected pilot users will be migrated this month. All others remain unchanged.
- **Cutover Communication (for managers):**
  - *"On Friday at 8:00 PM, we will migrate Division A's 1,000 users. Managers should remind staff to log out of all systems before the cutover window. Login instructions will be distributed by IT before Monday morning."*

Disclaimer

The tools and artifacts in this section — briefing decks, runbooks, calculators, and communication templates — are examples. They provide structure and repeatable formats but must be customized with real data, systems, and audiences. CIOs should work with their IT leadership, Finance, and Communications teams to tailor these assets for their specific environment.

Putting It All Together

The CIO cannot operate on intuition alone. Tools and assets provide the structure and clarity that executives, IT teams, and employees expect during a merger. With an executive briefing deck, IT runbooks, ROI calculators, and communication templates, the CIO has everything needed to communicate with confidence, execute with discipline, and demonstrate value. These tools ensure that IT's work is not only effective but also visible, measurable, and aligned to the merger's strategic goals.

SECTION

09

CIO's Dream Outcome Checklist

Why This Matters

In the whirlwind of a post-merger integration, it is easy for the CIO and their team to get buried in tasks, tickets, and crises. What executives want to know is not the status of individual tasks, but whether IT is delivering on the **big outcomes** that define success.

A Dream Outcome Checklist gives the CIO a simple way to align with executives, communicate progress clearly, and keep the IT team focused on what really matters. It shifts the conversation from "what did IT do this week?" to "is IT delivering stability, savings, and scalability that enable the merger's business goals?"

How to Use the Checklist

The CIO should use the Dream Outcome Checklist as a **scorecard** to track progress against six outcome categories. This scorecard should be updated at each 30/60/90-day milestone and presented to both executives and IT leadership.

- **For Executives:** Use it to demonstrate progress in terms that matter — business continuity, cost savings, risk reduction, and scalability.
- **For the IT Team:** Use it to remind everyone that the goal is not just migrations and configurations, but outcomes that deliver value to the business.

Supporting Artifacts

1. Dream Outcome Checklist

OUTCOME AREA	SUCCESS CRITERIA	STATUS	NOTES/NEXT STEPS
Unified IT Environment	Users, groups, and devices consolidated into one domain; cross-org access enabled	△ In progress	2,000 of 5,000 users migrated

OUTCOME AREA	SUCCESS CRITERIA	STATUS	NOTES/NEXT STEPS
Business Continuity	No critical outages; mail and apps accessible to all users	✔ Achieved	Minor login errors resolved
Security & Compliance	MFA enforced, audits passed, compliance maintained	△ In progress	HIPAA audit scheduled week 8
Cost Savings Realized	Duplicate licenses removed, early ROI snapshot delivered	△ In progress	$800K savings achieved of $1.2M
Executive Confidence	CIO seen as reliable; IT updates predictable and structured	✔ Achieved	Weekly dashboard updates in place
Future Scalability	Environment structured for next M&A; governance framework established	△ In progress	Governance board launched; further policies needed

2. CIO Scorecard (Traffic Light Model)

A simple red/yellow/green view for executives:

OUTCOME AREA	STATUS	COMMENTARY
Unified IT Environment	🟡 Yellow	Migration underway, full consolidation in progress
Business Continuity	🟢 Green	No outages, email and apps stable
Security & Compliance	🟡 Yellow	Controls in place, HIPAA audit upcoming
Cost Savings Realized	🟡 Yellow	$800K savings achieved, more consolidation needed
Executive Confidence	🟢 Green	Executives aligned, positive feedback received
Future Scalability	🟡 Yellow	Governance launched, policies still being refined

3. 30/60/90-Day Progress Alignment

At each milestone, update the checklist to show where outcomes stand.
- **Day 30**: Focus on Business Continuity (must be green). Others may still be yellow.
- **Day 60**: Unified IT Environment and Cost Savings should show progress.
- **Day 90**: All outcomes should be at least yellow, with Business Continuity and Executive Confidence solidly green.

Disclaimer

The Dream Outcome Checklist and Scorecard provided here are templates. The actual criteria, metrics, and progress will vary by organization. CIOs must adapt the checklist with input from IT leadership, business units, and executives. The key is not the template itself, but the discipline of reviewing progress regularly and tying IT outcomes directly to business value.

Putting It All Together

The CIO's Dream Outcome Checklist ensures that IT integration efforts stay aligned with what matters most: continuity, savings, risk management, and scalability. By updating and sharing the checklist at each milestone, the CIO demonstrates discipline, transparency, and progress in terms executives understand. The checklist becomes both a leadership tool and a communication tool — one that keeps IT focused and executives reassured that the merger is delivering the outcomes promised.

Summary

Mergers and acquisitions are some of the most challenging events an enterprise can face, and IT is often at the center of whether they succeed or fail. The CIO sits at the intersection of technology, business, and strategy, responsible for ensuring continuity, driving cost savings, reducing risk, and building a foundation for future growth.
This playbook has provided a structured framework to help CIOs lead effectively during the critical first 90 days of integration. It combines both **what needs to be achieved** and **how to achieve it**, supported by artifacts and templates that make execution tangible.

- **Section 1: Executive Summary** outlined the CIO's role as a strategic enabler and framed the dream outcomes IT must deliver.
- **Section 2: Communicating with Executives** showed how to frame IT progress in business terms and provided artifacts like dashboards, risk snapshots, ROI trackers, and talking points.
- **Section 3: Communicating with the IT Team** emphasized clarity, direction, and morale, supported by role matrices, escalation paths, and weekly team updates.
- **Section 4: Key Questions Every CIO Must Ask** expanded the CIO's "question bank" to align with executives, IT leaders, business units, and vendors.
- **Section 5: Cost vs Value Framework** provided tools to compare integration versus consolidation, including cost/value matrices and TCO models.
- **Section 6: 90–Day Roadmap** detailed a phased approach — first stabilizing operations, then consolidating environments — supported by milestone trackers and cutover checklists.
- **Section 7: Risk Management & Governance** offered frameworks for proactive risk management and lightweight governance, including a CIO risk dashboard and mitigation playbooks.
- **Section 8: Tools & Assets** listed the essential tools CIOs need — executive briefing decks, technical runbooks, ROI calculators, and communication templates.
- **Section 9: CIO's Dream Outcome Checklist** provided a scorecard to track progress against six outcome areas, ensuring IT stays aligned with business goals.

Together, these sections provide CIOs with a comprehensive playbook to navigate the complexity of post–merger integration. The emphasis is not only on keeping systems running, but on demonstrating IT's role as a driver of business value.
By using the frameworks, tools, and artifacts in this playbook, CIOs can:

- Protect business continuity and maintain executive confidence.
- Deliver early financial wins through cost savings and license consolidation.
- Reduce risks through structured governance and disciplined execution.
- Keep IT teams aligned, empowered, and motivated during a high-pressure transition.
- Demonstrate measurable outcomes at 30, 60, and 90 days.

Above all, this playbook helps the CIO shift the narrative: IT is not just a technical function responding to problems, but a **strategic leader enabling the merger's success.**

Next Steps:

Leading IT through a merger is one of the most complex challenges a CIO will face. Even with a clear roadmap, disciplined governance, and strong execution, the scale of identity, infrastructure, and application integration can strain resources and create risks.

You don't have to do it alone.

Hekima Business Solutions has helped organizations navigate post-merger integrations with proven frameworks, technical expertise, and a focus on delivering business outcomes. Whether you need advisory support, hands-on migration execution, or a trusted partner to guide your IT team, our Merge360 offerings are designed to help you succeed.

Next Step

If you would like to discuss how we can support your integration journey, schedule a meeting with the Hekima team today.
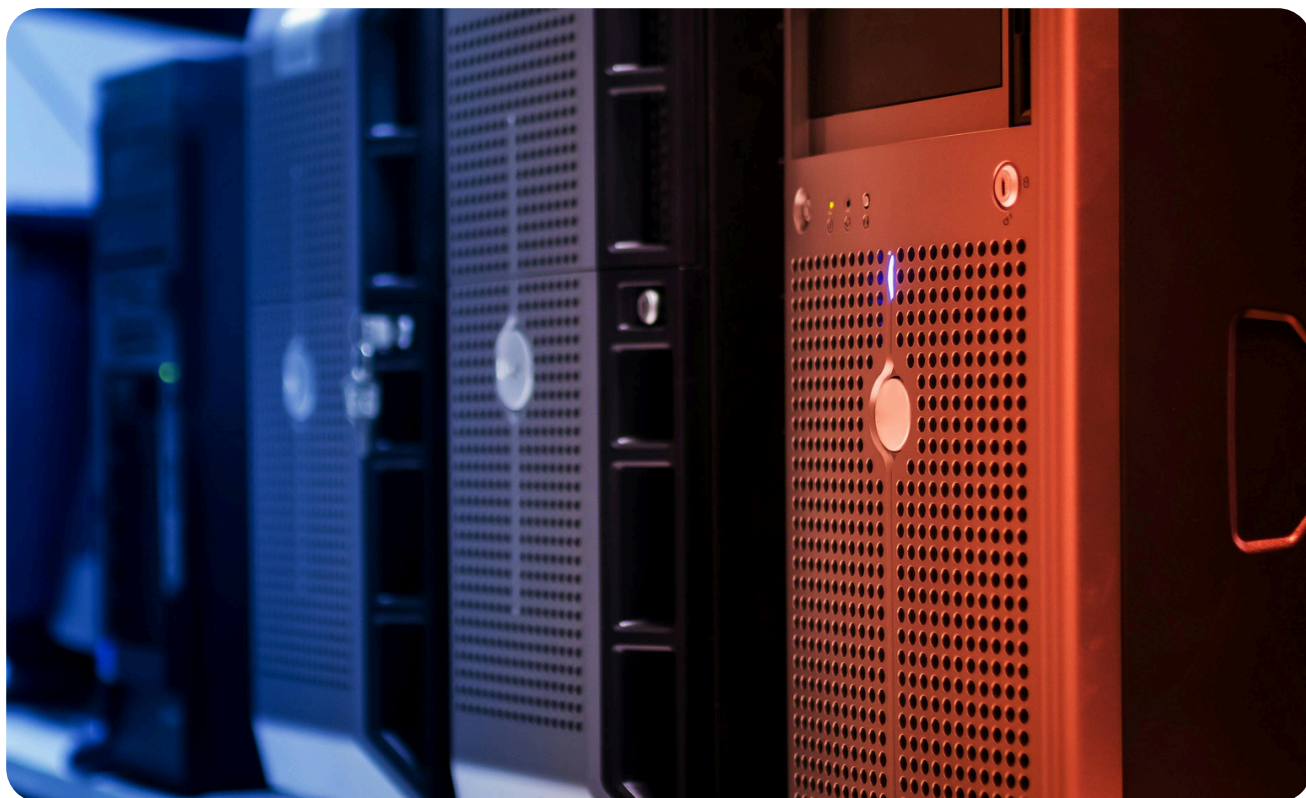
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SECTION

10

Appendix

Purpose of the Appendix

The appendix provides reference material that supports the core playbook. While the main sections focus on strategy and execution, the appendix gives CIOs quick access to definitions, reporting templates, and an example case study to illustrate how these practices come together.

Glossary of Terms

- **Active Directory (AD):** Microsoft's identity directory service, often central to user and system authentication.
- **Directory Synchronization:** The process of keeping multiple identity directories aligned, enabling users to work across environments.
- **Federation / SSO (Single Sign-On):** A method that allows users to authenticate once and access multiple systems.
- **DNS/DHCP:** Core infrastructure services that support domain resolution and network connectivity.
- **GPO (Group Policy Object):** A set of rules in Active Directory used to control security and configuration across devices.
- **Coexistence:** Running IT environments in parallel after a merger, enabling interoperability without full consolidation.
- **Consolidation:** Merging IT environments into a single unified system to reduce redundancy and costs.
- **Cutover:** The point in a migration when users, systems, or applications are switched to the new environment.
- **ROI (Return on Investment):** A measure of financial value delivered by IT integration (e.g., license savings, infra reductions).
- **Risk Mitigation:** Steps taken to reduce the likelihood or impact of a risk materializing.
- **Governance:** Processes and decision structures to ensure accountability, compliance, and consistency.

Sample Reporting Templates

1. Executive Dashboard (One-Page Example)

AREA	STATUS	KEY METRIC	BUSINESS SUMMARY
Identity & Access	🟢 Green	95% of users synced	Cross-domain access stable
Applications & Infra	🟡 Yellow	12/15 apps validated	Three apps pending remediation
Security & Compliance	🟢 Green	100% MFA enforced	Audit readiness confirmed
Cost & Synergy	🟡 Yellow	$800K savings of $1.2M target	License consolidation underway

2. Risk Snapshot Template

RISK	IMPACT	MITIGATION	OWNER	STATUS
Duplicate O365 tenants	High	Consolidation in progress	CIO + CFO	In progress
Mail routing disruption	High	Backup routing tested	Infra Lead	Mitigated
Compliance gap (HIPAA)	High	Audit scheduled	CISO	Open

3. Milestone Tracker Template

MILESTONE	TARGET STAE	STATUS	OWNER	BUSINESS IMPACT
Directory sync established	Day 10	✔ Done	Identity Lead	Ensures secure cross–domain access
Pilot migration (500 users)	Day 40	△	Migration Lead	Validates migration process
ROI snapshot delivered	Day 85	△	CIO + CFO	Demonstrates savings to executives

Sample Case Study: Post–Merger Integration in Action

Background:

A mid-size healthcare provider acquired a regional competitor with 5,000 employees. Both organizations used Microsoft O365, but in separate tenants. The goal was to unify identity, email, and applications within 90 days while maintaining HIPAA compliance.

Phase 1 – Stabilize (Day 1–30):

The CIO prioritized coexistence. Directory synchronization was established between environments using Entra Connect. Mail routing was configured to allow seamless communication between organizations. MFA was enforced to meet HIPAA requirements. An executive dashboard reported stable operations and identified risks.

Phase 2 – Consolidate (Day 31–90):

The IT team executed pilot migrations for 500 users, then scaled to 2,000 users in controlled waves. Group Policies were aligned, reducing login errors by 30 percent. Duplicate O365 licenses were consolidated, saving $900,000 annually. A cutover readiness checklist ensured smooth execution.

Outcomes:

- Business continuity maintained with zero downtime.
- Cost savings exceeded projections ($900K vs. $800K target).
- Compliance maintained through proactive risk management.
- CIO gained executive confidence by delivering regular updates using dashboards, risk snapshots, and ROI trackers.

Lessons Learned:

- Early communication with users reduced confusion and tickets by 40 percent.
- Pilots were essential to validate migration tools and processes.
- Governance ensured accountability — every major decision had an owner.

Disclaimer

The glossary, reporting templates, and case study in this appendix are examples provided for reference. Each CIO should adapt terminology, templates, and lessons learned to the unique systems, risks, and business priorities of their organization.

Putting It All Together

The appendix provides a quick-reference library to support the main playbook. With a glossary of terms, reporting templates, and a case study, the CIO has practical examples and ready-made tools to guide both communication and execution. These resources reinforce the playbook's core message: IT leadership in a post-merger environment is not about technical tasks alone, but about structured communication, disciplined execution, and business alignment.