



CA Acquisitions Playbook

For Internal Communication and
Collaboration

Prepared by

X

Dr. Sanq Sur
M&A Lead, Global Information Systems

Approved by

X

Integration Management Office

X

Corporate Business Development

X

Corporate Strategy

X

GIS, Business Solutions Group

X

GIS, Systems and Technology Office

X

GIS, Information Mgmt and Shared Services

X

Sales

X

Sales Operations

X

Marketing

X

Marketing Operations

X

Finance

X

Professional Services

X

Support

X

Human Resources

X

Technology / Product Management / Engine...

X

Admin Services

X

Financial Planning and Analysis (FP&A)

1 Contents

2	Revision History	5
3	Preface	6
4	High Level View of Acquisition Activities	7
4.1	Summary of Diligence Phase.....	7
4.2	Summary of Integration	8
5	Vendors/Contracts and Budget for M&As.....	10
5.1	Difficulties in generating a finalized contracts/vendors list.....	10
6	Diligence Phase	11
6.1	Confidentiality.....	11
6.2	Information that can be shared between potentially-to-be-acquired entities	11
6.3	Potential Reasons for Purchase	11
6.4	Methods to purchase companies	12
6.5	Difficulties Gathering Data during Diligence Phase	13
6.6	Functional Disciplines’ Responsibilities during Diligence Phase	13
6.6.1	Admin Services.....	13
6.6.2	Global Information Systems (GIS), Information Technology	13
6.6.3	Human Resources	13
6.6.4	Pre-Sales / Sales / Sales Operations.....	14
6.6.5	Professional Services.....	14
6.6.6	Product Marketing / Marketing Operations	14
6.6.7	Technology / Product Management / Engineering (R&D).....	14
6.6.8	Finance / Sales & Corporate Accounting / Tax / Pricing	14
6.6.9	Support / Global Support Center (GSC)	14
6.6.10	Legal (Export / IP).....	14
7	Integration Phase.....	15
7.1	Sensitivity toward newly acquired employees	15
7.2	CA Orientation	15
7.3	Communications	15
7.4	Difficulties in Integration Phase.....	15
7.5	Functional Disciplines’ Responsibilities during Integration Phase.....	15
7.5.1	Admin Services.....	16
7.5.2	Global Information Systems (GIS), Information Technology	16
7.5.3	Human Resources	16
7.5.4	Sales / Sales Operations.....	16

7.5.5	Marketing / Marketing Operations.....	16
7.5.6	Engineering (R&D).....	16
7.5.7	Finance.....	16
7.5.8	Support.....	16
7.5.9	Professional Services.....	17
8	Beyond Integration.....	18
8.1	Lessons Learned.....	18
8.2	IT Allocation – How increased annuals costs due to acquisitions are handled.....	18
9	Key Terms and Acronyms.....	19
10	Appendix.....	20
10.1	GIS-specific Integration Activities.....	20
10.1.1	Summary of GIS Activities.....	20
10.1.2	(STO) Infrastructure.....	22
10.1.3	(STO/BSG) Office Suite and Collaboration Tools.....	22
10.1.4	(BSG) Sales.....	22
10.1.5	(BSG) Marketing / Online.....	22
10.1.6	(BSG) Engineering (R&D).....	22
10.1.7	(BSG) Human Resources.....	22
10.1.8	(BSG) Finance.....	22
10.1.9	(BSG) Support.....	22
10.1.10	(BSG) Professional Services.....	22
10.1.11	(IM&SS) Analytics.....	22

List of Tables

Table 1 – RACI chart of who makes decisions on whether to keep or integrate systems or vendors used by acquired entity.....	9
Table 2 – Historical record of funding approved for GIS-use.....	21
Table 3 – Historical Record of funding ownership.....	21

List of Figures

Figure 1 – High level view of Diligence Phase.....	7
Figure 2 – Typical reasons why an entity is acquired.....	12