




Mit Enterprise Architecture Management die Post-Merger- Integration erfolgreich gestalten

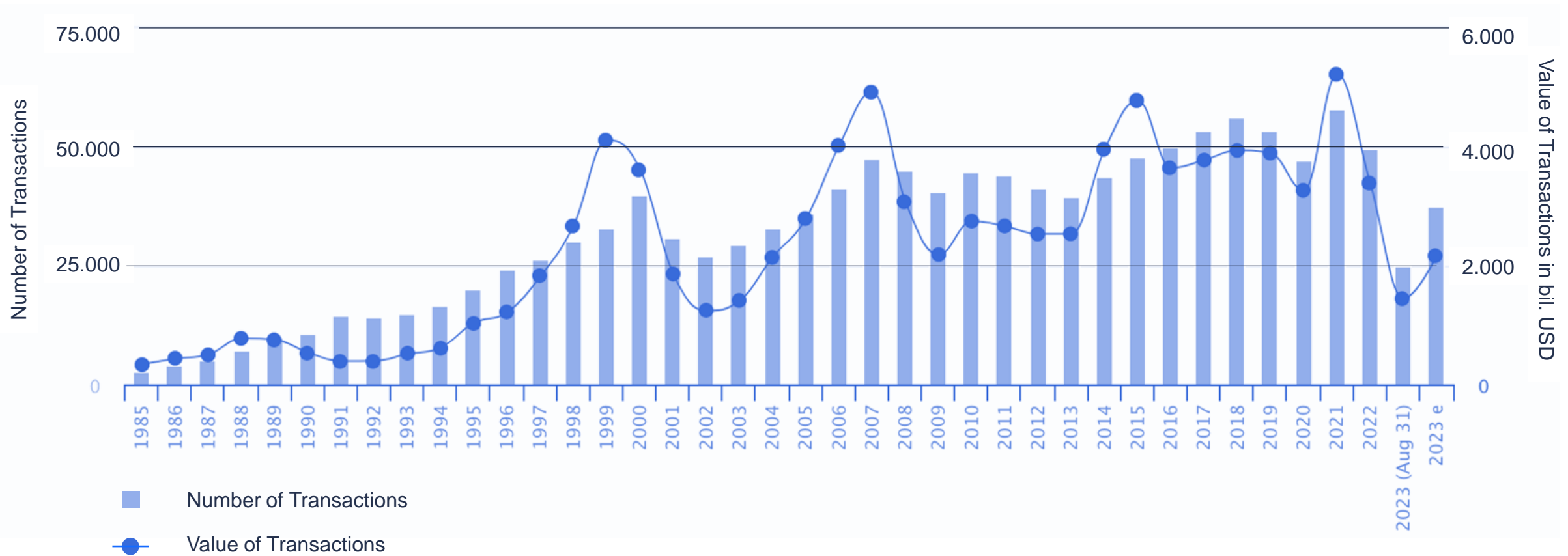
Oliver Klein

LeanIX, Director Global Strategic Alliances



After a drop in 2021, the number of deals increases again LeanIX

Mergers & Acquisitions Worldwide



Frankfurter Allgemeine

Inflation, steigende Zinsen und weltpolitische Verwerfungen haben den Fusionsmarkt in Deutschland zum Jahresauftakt weiter geschwächt. Unsicherheit über Geschäftsaussichten und sinkende Bewertungen im Technologiesektor und anderswo erschweren die Preisfindung. Der Kreditanteil an der Finanzierung ist deutlich teurer geworden. Einige wenige große Transaktionen retten das Bild – das wird daraus ersichtlich, dass das Gesamtvolumen der Transaktionen im bisherigen Jahresverlauf viel weniger geschrumpft ist als ihre Zahl. Ein herausragendes Projekt ist der Plan des Softwareanbieters **SAP**, sein verbliebenes Paket von gut 70 Prozent an der amerikanischen Tochtergesellschaft Qualtrics für 7,7 Milliarden Dollar abzugeben – an den Finanzinvestor Silver Lake und den kanadischen Pensionsfonds CPP.

[FAZ, "Die Fusionsflaute", 27.03.2023](#)

Handelsblatt

Frankfurt. Nach einem verhaltenen Jahresauftakt erwarten Investmentbanker für die zweite Jahreshälfte eine spürbare Belebung im Markt für Fusionen und Übernahmen. „In den letzten Wochen wurden viele Beratungsmandate an Investmentbanken vergeben, was auf eine vermehrte Transaktionstätigkeit im dritten und vierten Quartal hindeutet“, sagt Holger Knittel von der Investmentbank Citi. Ähnlich äußerten sich zahlreiche andere Banker. Die M&A Experten gehen aber nicht davon aus, dass sie an die Rekorde der Jahre 2020 und 2021 anknüpfen können – zu sehr drücken geopolitische Unsicherheiten, konjunkturelle Schwäche sowie gestiegene Zinsen auf die Stimmung.

[Handelsblatt, "Banker erwarten mehr M&A-Deals nach dem Sommer", 16.06.2023](#)

Handelsblatt

Düsseldorf, Frankfurt. Der Markt für Übernahmen und Fusionen (M&A) in der Pharmabranche erholt sich: Nach einem vergleichsweise schwachen Jahr 2022 wurden in der ersten Hälfte des Jahres Deals mit einem Volumen von mehr als 95 Milliarden Dollar angekündigt oder umgesetzt. Das geht aus einer Auswertung des Finanzdatendienstleisters Refinitiv hervor.

Damit ist der Umfang der Deals im ersten Halbjahr 2023 im Vergleich zum Vorjahreszeitraum um 84 Prozent gestiegen. Und Marktexperten sind auch für die zweite Jahreshälfte und darüber hinaus optimistisch.

[Handelsblatt, "Wird 2023 ein starkes Jahr für Deals in der Pharma Branche", 07.07.2023](#)

manager magazin

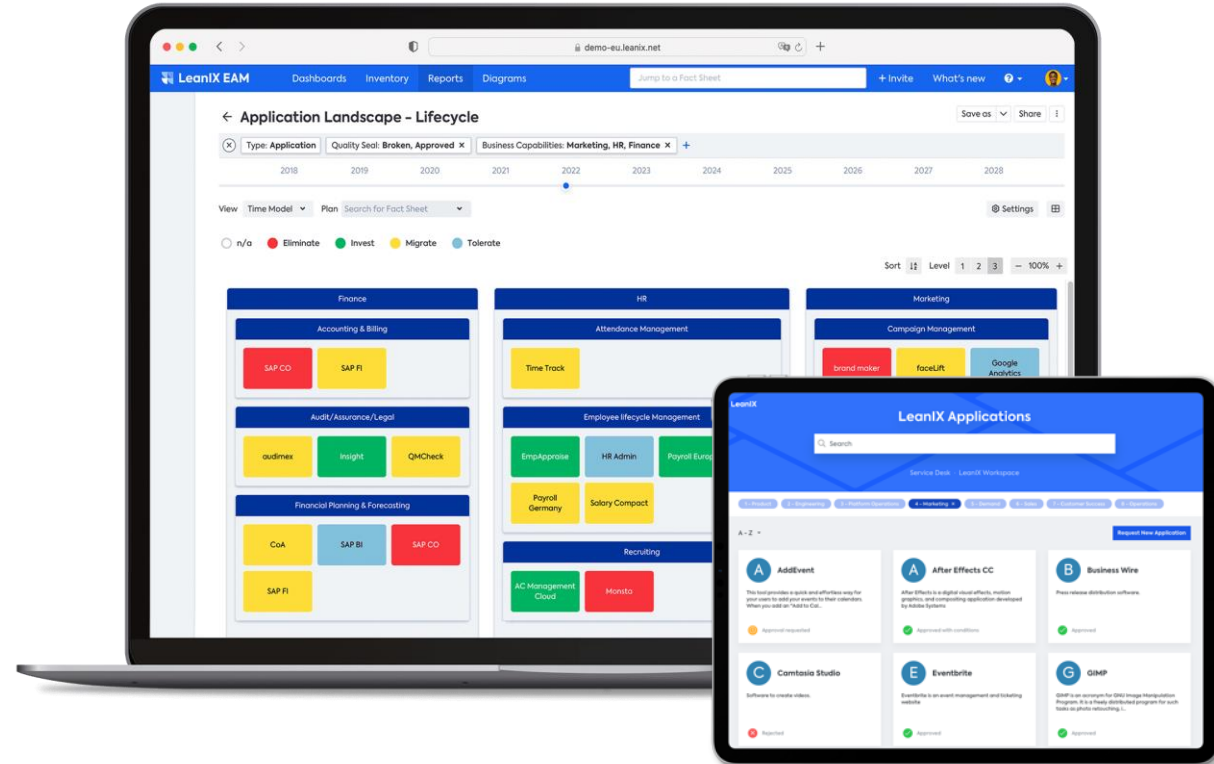
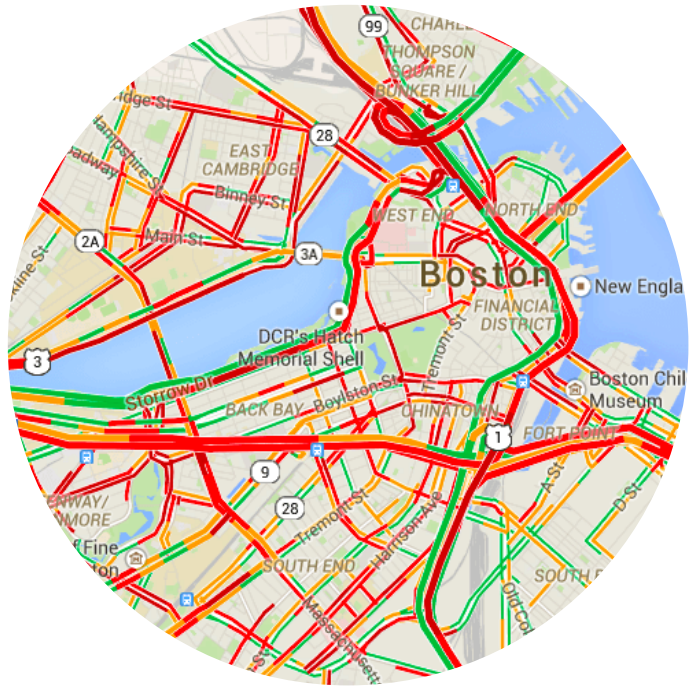
[Das Google Maps für die Firmen-IT](#)

SAP übernimmt Softwaremanagement-Start-up LeanIX

Zehn Jahre nach der Gründung verkauft André Christ sein Start-up LeanIX an den Softwaregiganten SAP. Die Rede ist von einer Milliardenbewertung. Kunden wie Adidas und Beiersdorf nutzen die Software, um ihre eingekauften Programme zu überblicken.

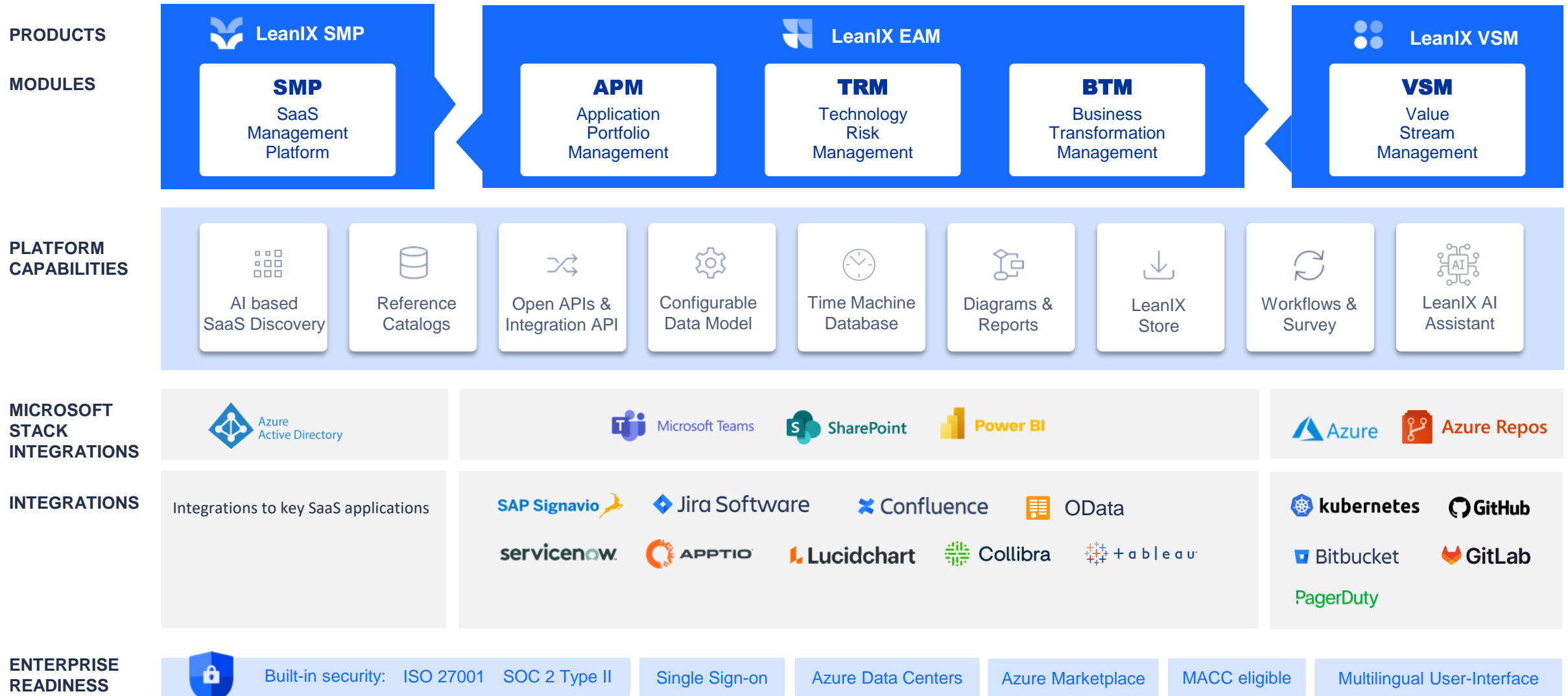
[Manager Magazin, "SAP – Christian Klein übernimmt Software Management Startup LeanIX", 07.09.2023](#)

LeanIX – IT mapping and transformation management

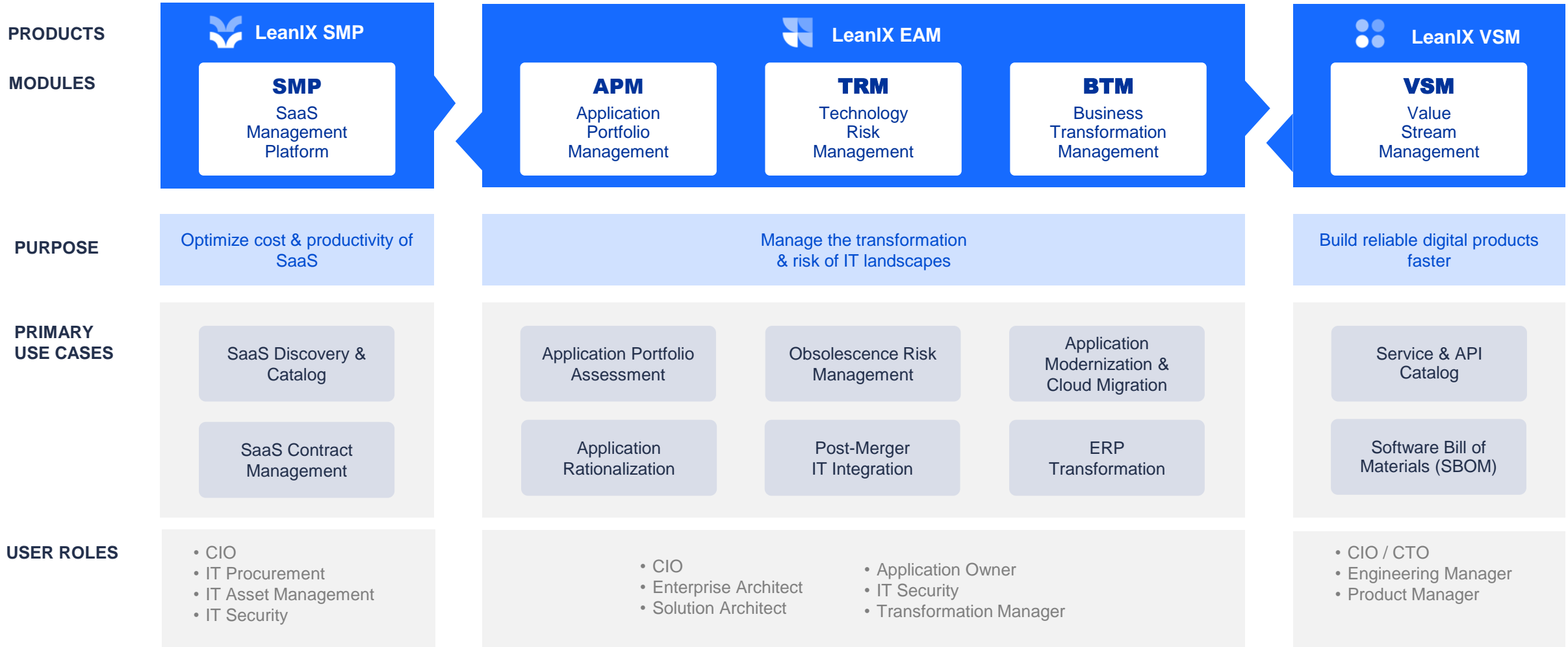


adidas Dropbox BOSCH Lufthansa OTIS MIGROS salesforce + 1000 more

The Platform: Cloud native solutions that run on Azure



Enabling various transformation use cases



Customers use LeanIX for more use cases which require data-driven decisions based on transparency of their IT landscape

Case Study: Successful Consolidation of Two IT Landscapes in Nationale Suisse Merger

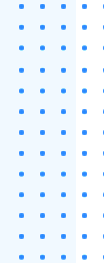


THE CHALLENGE

To realize economies of scale to over €100 million per year

THE RESULTS

- ✓ Single source of truth for strategic IT management decisions
- ✓ Identified synergies totalling millions of euros due to reduced IT redundancy
- ✓ Faster IT project starts, reduced setup efforts
- ✓ Shared EA responsibility with central governance
- ✓ Established catalogue of technology standards



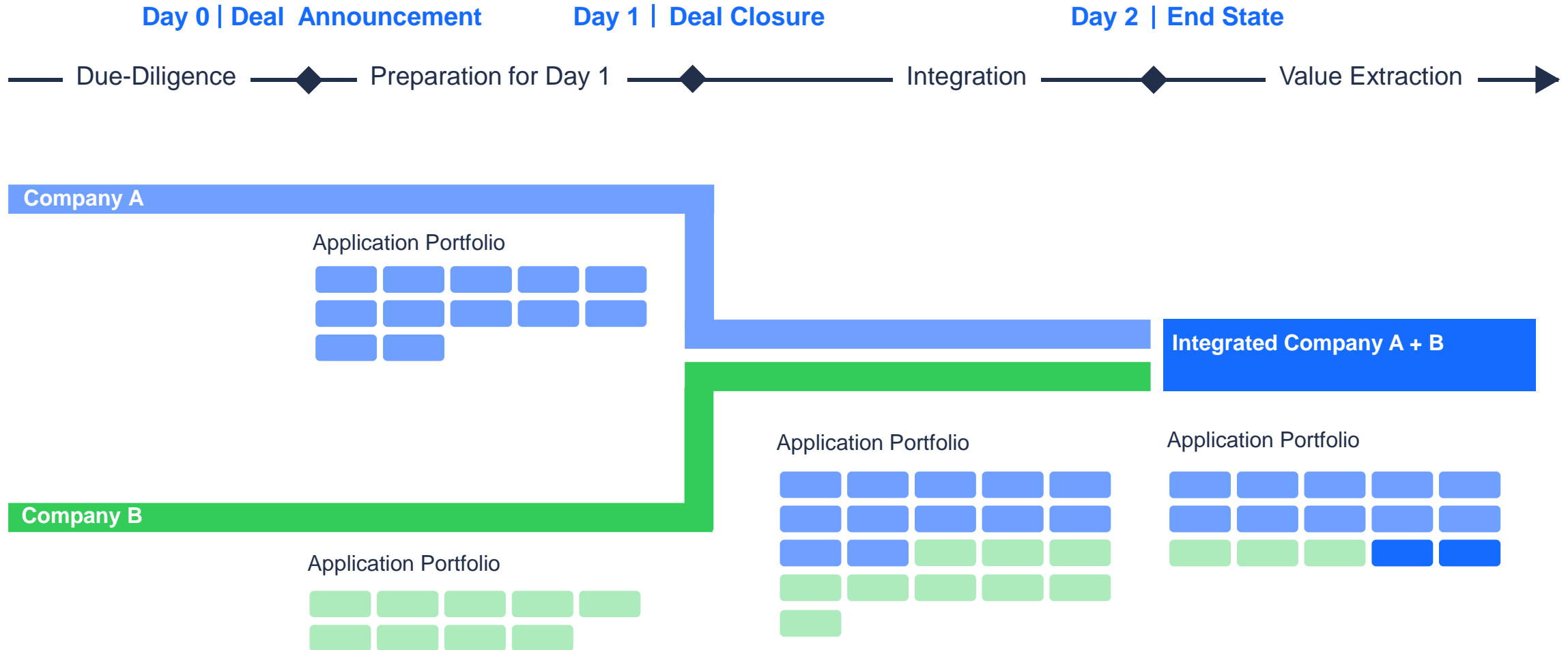
LeanIX best practice reports serve as the basis for actionable EA



“The agile, lightweight and fast to implement approach of LeanIX fits the needs of the IT organization with distributed responsibilities while following a central governance. It allows my team to establish an increased IT transparency across country borders.”

*Silvio Hefti,
Group CIO Helvetia*

Post-merger IT integration process



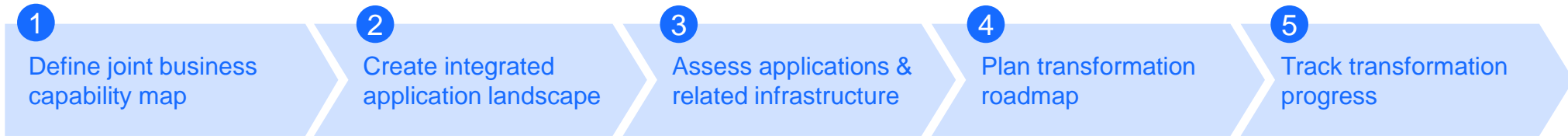
Five phases to achieve an integrated architecture



Day 1 | Deal Closure

Day 2 | End State

Integration



- Define rationalization objectives
- Define business capabilities and decide on scope for application rationalization
- Define rationalization principles for individual business capabilities
- Define KPIs to track rationalization success

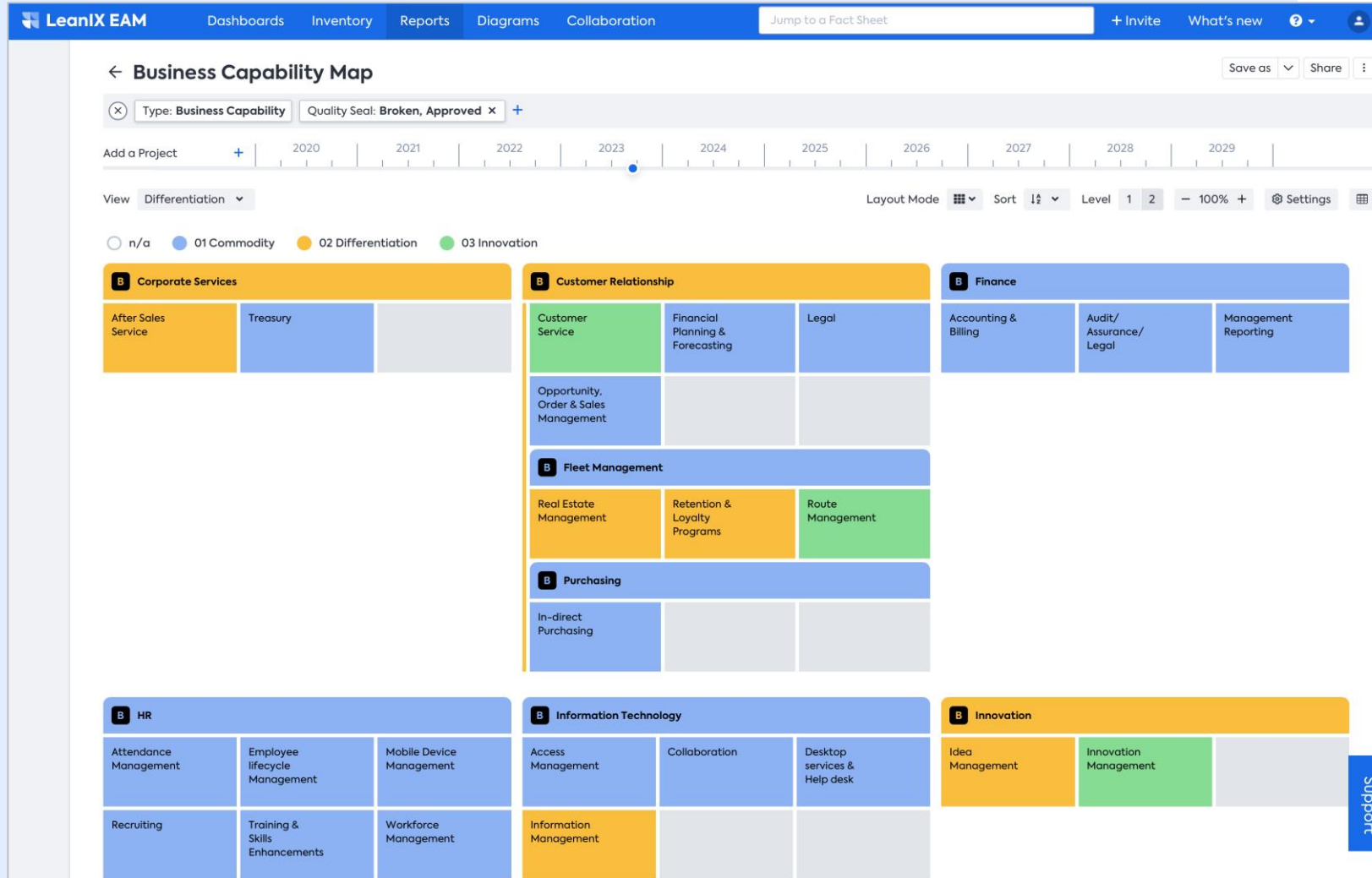
- Import data and use integrations to gather data about the as-is architecture
- Use survey functionalities and Generative AI to collect, to validate and to enrich data
- Assign applications to business capabilities to identify applications with comparable business capability support

- Score applications of business capability segments that are in scope for integration
- Leverage information from reference catalogs
- Use automations to classify and cluarchitecture objects
- Use reports and data flow diagrams to analyze the application landscape in regards of business capability support, cost drivers, synergy potentials and dependencies

- Define transformation approaches for individual architecture objects and model their impacts
- Organize transformation opportunities in structured transformation scenarios
- Build a comprehensive transformation roadmap based on evaluated scenarios
- Project and visualize the future state of the application landscape at defined transformation milestones

- Execute transformation and transformation objects according to progress
- Use reports and KPI dashboards to visualize and track transformation progress

Define target business capability map



- Capture and model Business Capabilities of the acquired organization
- Map them to existing capabilities and derive a joint Business Capability map
- Classify business capabilities according to the Gartner Pace Layer model (Commodity, Differentiation, Innovation) to define the transformation scope and priorities
- Evaluate business capabilities for their current and future maturity level.

Gather relevant Enterprise Architecture data

The screenshot displays the LeanIX EAM interface. At the top, there's a navigation bar with tabs for Dashboards, Inventory, Reports, Diagrams, and Collaboration. A search bar and a "Jump to a Fact Sheet" button are also visible. The main content area is titled "Inventory" and shows a list of items with various filters on the left. A modal dialog box titled "Upload .xlsx File" is open in the center. The dialog contains a "Please note" section with the following points:

- Only a single Fact Sheet Type can be imported.
- Fields on Relations can be exported but not reimported
- Only .xlsx with up to 10.000 rows can be imported

Below the notes, there's a link to the "Import Guide" and a dashed box with an upload icon and the text "DROP A FILE TO UPLOAD OR BROWSE". Underneath this box, it says "Maximum allowed file size is 10 MB". The background of the interface is dimmed, showing a list of items like "AC Management", "Account", and "Acocce Application Hosting".

- Get started by importing existing architecture data from existing lists (e.g. Excel, SharePoint, tool data exports)
- Leverage automated SaaS Discovery to find all of your SaaS applications and add them to your inventory

Synchronize data from IT systems



LeanIX EAM Dashboards Inventory Reports Diagrams Collaboration Jump to a Fact Sheet + Invite What's new

Search by item name

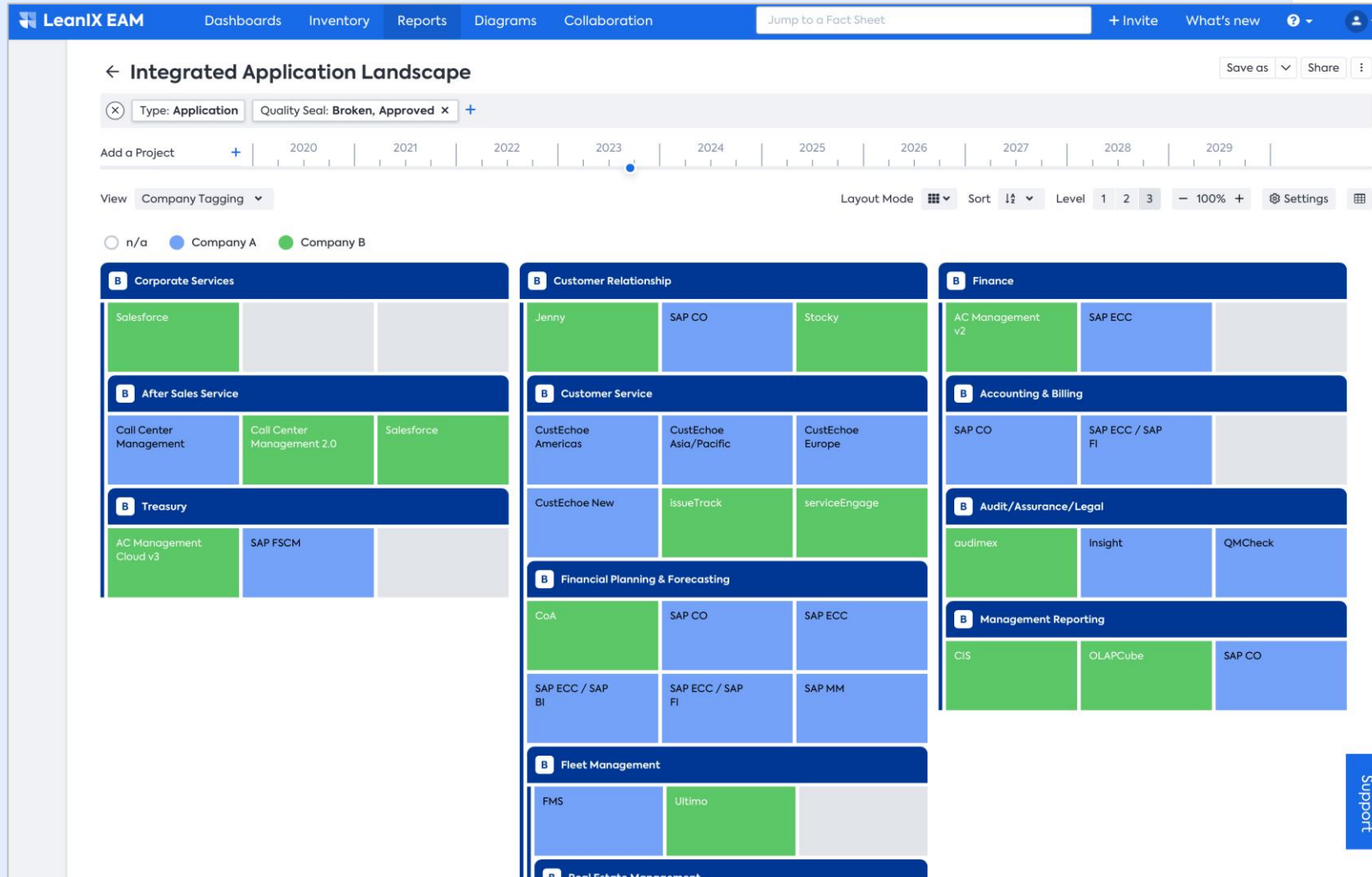
Integrations

Application	Version	Status	
SAP Signavio SAP Signavio is a web-based tool for business process management. Connect it with LeanIX in order to link your application portfolio to business processes. The new integration 3.0 now allows to map further Fact Sheets to Glossary items in SAP Signavio.	3.0	Active	Configure Show log
servicenow ServiceNow creates a centralized service model in the cloud to power enterprise service management across the global organization. Connect ServiceNow with LeanIX to benefit from a seamless data exchange, e.g. get all your Applications as Business Applications in ServiceNow.	1.0	Disabled	
APPTIO Apptio is a tool which allows you to analyze, plan, optimize, control, and collaborate about IT investments. Connect it with LeanIX to benefit from a seamless integration	1.0	Disabled	
Confluence Confluence is a professional WIKI to enable team collaboration in companies. Enable the Confluence integration to allow LeanIX users to publish their reports as images into their WIKI pages. The Confluence integration is managed from the Atlassian side. Please contact your CSM for more details.			
Jira Software integrations.jira.appDescription			
Jira Software Intended for use with the LeanIX BTM module, this integration allows linking Jira Epics to Projects in LeanIX, enhancing progress tracking. for LeanIX BTM module		Inactive	Configure
LeanIX VSM The workspace integration with VSM writes selected applications from this EAM workspace into products in the configured VSM workspace. In the opposite direction, the open source software risk that is calculated on the VSM products is synchronized back onto the		Inactive	Configure Show log

Support

- Use out-of-the-box integrations for key IT management systems like CMDBs
- Use LeanIX open APIs and LeanIX Integration API to create custom connectors to synch data from other IT management systems

Create an integrated application landscape



- Create a complete view of all applications from both companies
- Identify redundant applications that are serving the same business capability areas
- Analyse applications by usage and cost metrics

Conduct in-depth assessment of applications



The screenshot displays the LeanIX EAM interface for an application named 'AC Management' with a 48% overall score. The interface includes a navigation bar with 'Dashboards', 'Inventory', 'Reports', 'Diagrams', and 'Collaboration'. A search bar is present with the text 'Jump to a Fact Sheet'. The main content area is divided into 'Business Fit' and 'Technical Fit' sections, each with a list of metrics and star ratings. A modal window is open over the 'Reliance on Skills and Subject Matter Experts' metric, showing a detailed breakdown of staff adequacy levels.

Category	Metric	Rating
Business Fit	Business Need Coverage:	★★★★★ 2
	Information Quality:	★★★★★ 1
	Information Timeliness:	★★★★★ 1
	Information Security:	★★★★★ 3
	Future Potential:	★★★★★ 2
	Business Fit Score (total):	38%
	TIME Business Fit Category:	Low
Technical Fit	Reliance on Skills and Subject Matter Experts:	★★★★★ 3
	Maintainability:	★★★★★ 2
	Vendor Viability & Support:	★★★★★ 3
	Architectural Alignment :	★★★★★ 5
	Production Stability:	★★★★★ 3
	Security:	★★★★★ 4
	Technical Fit Score (total):	65%
	TIME Technical Fit Category:	High

Rating	Description
★★★★★ 3	Staff adequate, restaffing requires recruiting
★★★★★ 1	Inadequate staff, missing skills, restaffing risk
★★★★★ 2	Staff inadequate, some missing skills
★★★★★ 3	Staff adequate, restaffing requires recruiting
★★★★★ 4	Staff sufficient. External supply for restaffing
★★★★★ 5	Good pool of skilled staff with full backup

- Score applications by leveraging best-practice assessment models
- Spot applications and underlying IT infrastructure with a low business and technical fit to identify candidates for rationalization and modernization

Use surveys to collect and enrich data



- Identify stakeholders from the business and IT responsible for each application and let them take ownership for fact sheet data via subscriptions
- Use surveys to collect general feedback, perceived business criticality, and scoring information for business and technical fit assessments

Determine applications lifecycle information



Reference Catalogs

Reference Catalogs provide standard information for Business Capabilities, Applications, IT Components, Providers, and Tech categories. By activating these features you will be extending the Meta Model of your Fact Sheets and can define which fields and relations you want to automatically synchronise with our catalogs.

Business Capability Catalog SaaS Catalog **Lifecycle Catalog** Tech Category Catalog

Lifecycle Catalog provides provider lifecycle information for IT Components.

Provision Lifecycle Catalog to import and link IT Components filtering capabilities in the Inventory. This includes a Meta Model extension.

Please note: The Meta Model extensions can not be reverted. The provisioning of this workspace has already been executed.

Re-provision Lifecycle Catalog

Select the data fields to sync from Lifecycle Catalog to IT Component Fact Sheet

- Base Name - When disabled, multiple IT Component Fact Sheet entries are possible.
- IT Component subtype
- Description
- Lifecycle
- Version
 - Version only
 - Version + Edition

Select the relations to add to the IT Component Fact Sheet

- Providers
- Tech Category - IT Components would now be assigned to Tech Categories.

Save

Adopt LeanIX recommended TBM Taxonomy

- Import all TBM. To partially import TBM, use Import Wizard.
- Assign linked IT Components to imported TBM
- Archive legacy Tech Categories

Adopt TBM View Report

Oracle Database 11gR2 11.2.0.3

Oracle Database Standard Edition 11gR2 11.2.0.3
IT Component

Name & Description	Name	Description
	Oracle Database Standard Edition 11gR2 11.2.0.3	Oracle Database, developed by Oracle Corporation, is a widely-used, powerful, and scalable relational database management system (RDBMS). It is designed to store, manage, and retrieve data efficiently and securely, making it an ideal choice for various types of applications, from small-scale projects to large enterprise systems.

Details	Base Name	Database
	Version	11gR2 11.2.0.3
	Version Group	11.x
	Version Type	Build
	Edition	Standard Edition
	IT Component Type	Software
	Component Website	https://www.oracle.com/database/
	Component Family	Database
	Support Type	Enterprise Support

Data Collection	As of Date	2023-08-31
	Collection Comment	GA date is not available from websites, blogs and other sources also, however version exists. https://docs.oracle.com/cd/E11882_01/server.112/e41360/chaapter1_11203.htm#NEWFT355 Oracle provides indefinite lifetime paid support for this product. We are populating 01-01-2050 as a pre-define date in "Last Date of Paid Support post End of Life" for all the products which have indefinite lifetime paid support. https://www.oracle.com/us/assets/lifetime-support-technology-069183.pdf

- Leverage built-in reference catalogs with vendor meta data for > 42,000 SW & HW products such as official product names, version information and lifecycle data
- Categorize HW & SW products by leveraging the built-in reference TBM Taxonomy

Leverage Generative AI for data research



LeanIX EAM Dashboards Inventory Reports Diagrams Collaboration Jump to a Fact Sheet + Invite What's new

aiassistant Save as

Type: Application x Data Quality: No description x Quality Seal: Broken, Approved x +

Requests Create description of 2 sentences and link to website Reset

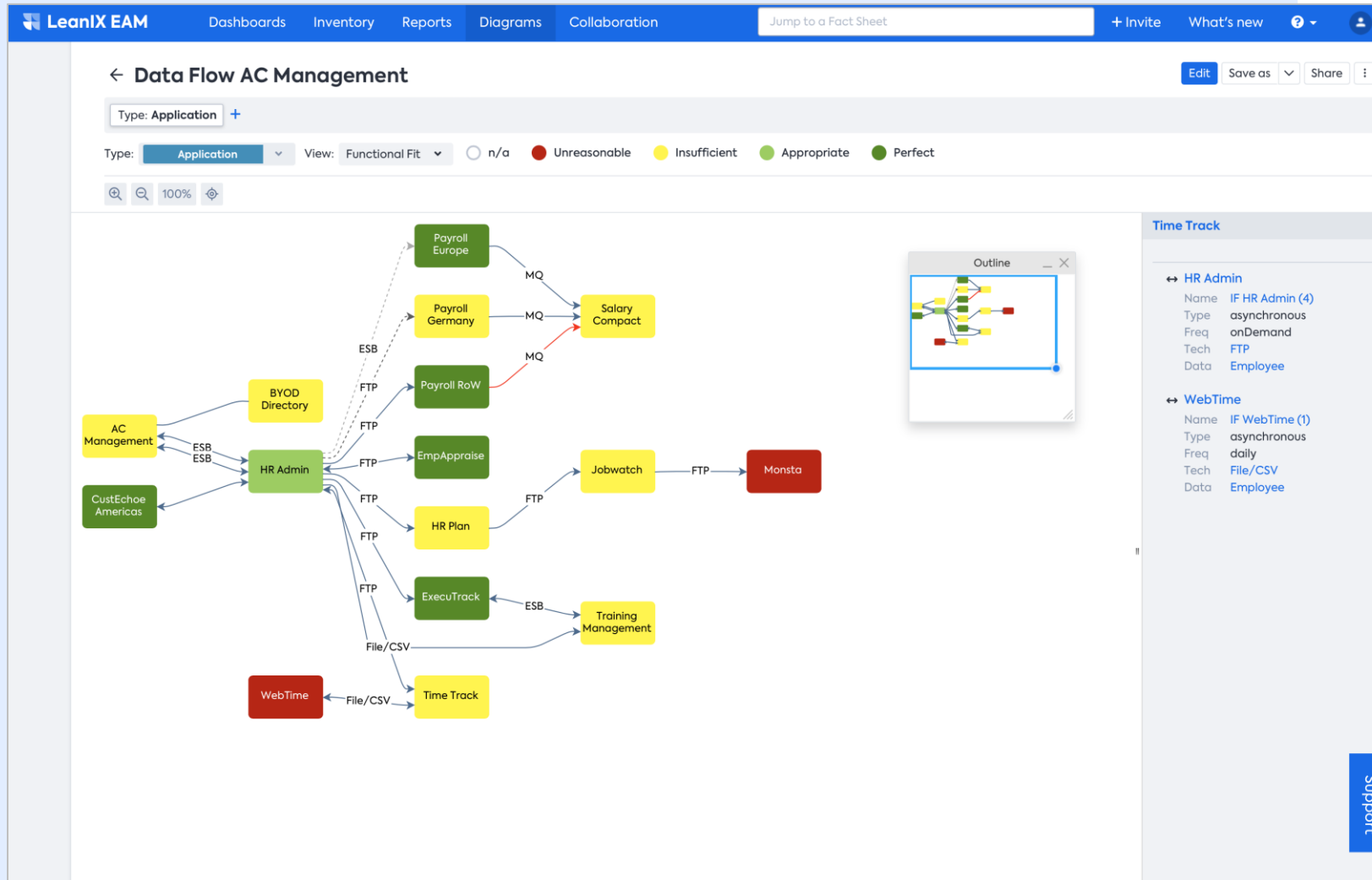
NAME	DESCRIPTION	LEANIX AI RESPONSE	ACTION
<input checked="" type="checkbox"/> AttorneyNet		AttorneyNet is a business-critical application that is no longer suitable for use due to unreasonable functional suitability. The application supported the Customer Relationship/Legal business capability and was used by the Headquarter user group, but had no registered data objects and was supported by the end-of-life Oracle Database 11g 11.1 technology. Unfortunately, there is no website available for AttorneyNet as it has reached the end of its lifecycle. Save description	
<input checked="" type="checkbox"/> AutoCAD		AutoCAD is a computer-aided design (CAD) software that allows architects, engineers, and designers to create precise 2D and 3D drawings. It is highly popular and widely used in numerous industries such as architecture, engineering, construction, and manufacturing. To learn more about AutoCAD, please visit their official website: https://www.autodesk.com/products/autocad/overview . Save description	
<input type="checkbox"/> Cap Test App			
<input type="checkbox"/> Contract Management			
<input type="checkbox"/> FMS			
<input type="checkbox"/> Idea Club			
<input type="checkbox"/> Imagine			
<input type="checkbox"/> Import Demo Application			
<input type="checkbox"/> Insight			

- Research with Generative AI information like product descriptions, successor technologies and architecture recommendations

Predefined Query Requests

- Application** Fill descriptions
- Application** Successors for low functional fit
- Application** Architecture recommendation
- Business Capability** Fill descriptions
- Business Capability** Criteria for software selection
- Data Object** Master Data Management
- Data Object** Example REST API
- Provider** ISO 27001 compliance
- Provider** Security Incidents
- IT Component** Unknown Software vendor lifecycles
- IT Component** Successors of unsupported technology

Identify applications interdependencies



- Gain an understanding of application dependencies and risks in the landscape
- Determine where interfaces are required to transform systems
- Spot data silos and identify the data available across each of them

Automate repeating assessment tasks



The screenshot displays the 'Edit Evaluation for Cloud-Migration' configuration page in the LeanIX EAM interface. The page is divided into several sections:

- MY SETTINGS:** Notifications, Password, Profile.
- BASIC SETTINGS:** Branding, General, Meta Model Configuration, Subscription Roles, Tagging, Users, User Roles.
- ADVANCED SETTINGS:** Automations (highlighted), Collections, Data Usage, Developer Configuration, Export, KPIs, Notifications Center.

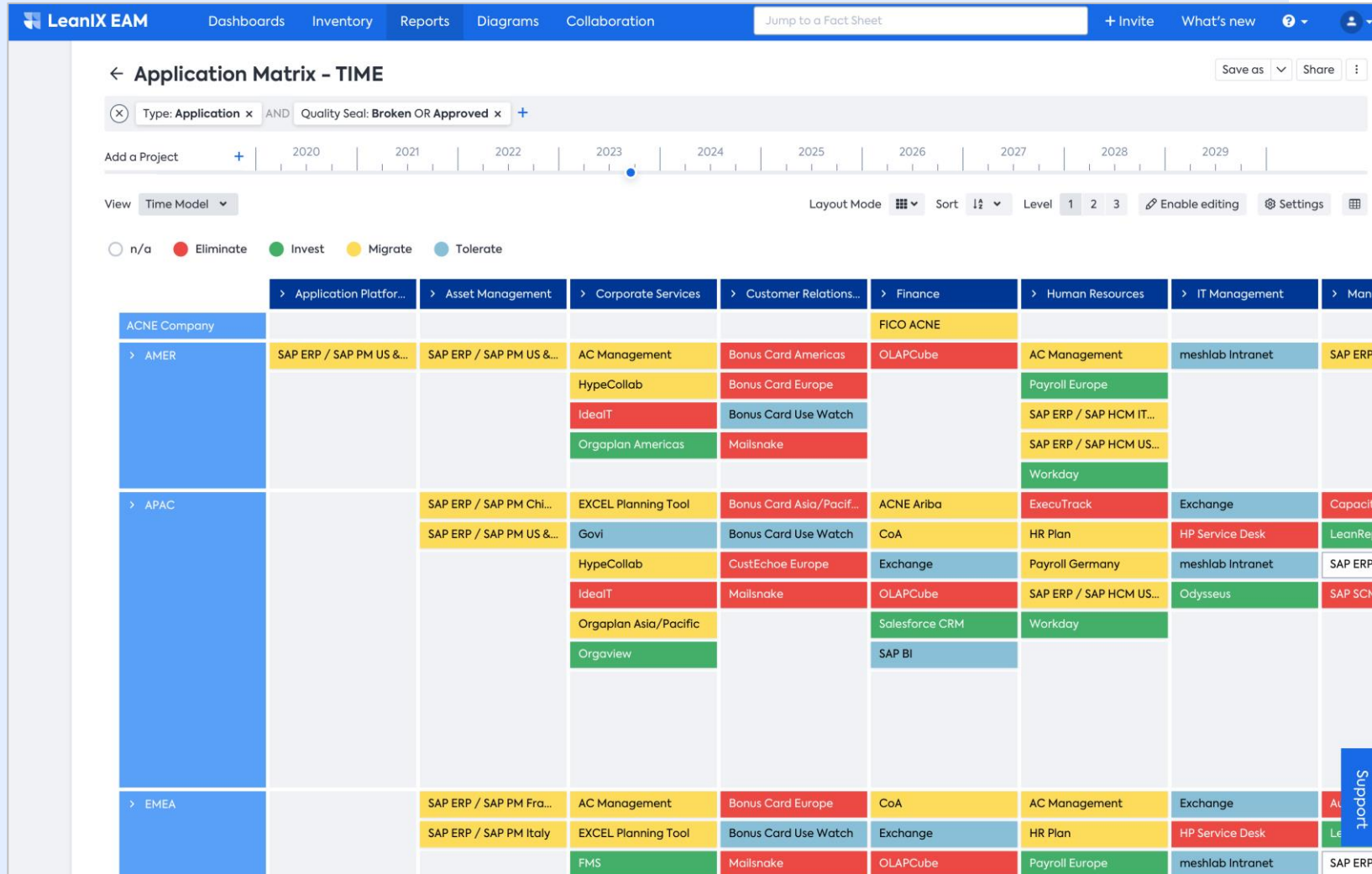
The main configuration area includes:

- Automation Name:** Evaluation for Cloud-Migration
- Description:** Evaluate on-premise application with low technical fit for cloud migration
- Owner:** Oliver Klein (oliver.klein@leanix.net)
- 1 When:** Triggers are events in a workspace that start the processing of an Automation. Once a trigger starts, the conditions will be validated and the action is initiated.
 - TRIGGER:** Fact Sheet Type: Application; Event: Fact Sheet is created
- 2 If:** Conditions are optional and will prevent the Automation from running unless all criteria are met.
 - 1. CONDITION:** Technical User is ignored
 - 2. CONDITION:** Single Select Field is Hosting Type

A 'Support' button is visible in the bottom right corner of the interface.

- Create automation procedures by using the built-in, low-code automation editor
- Assign tags and governance responsibilities with automations, or trigger action items

Define paths forward for each application



- Leverage reports evaluating the applications by technical fit, functional fit, and lifecycle
- Align on overall IT merger strategy: e.g., “best of both worlds” vs. “align on major platforms” vs. “the winner takes it all”
- Apply the TIME model to define if applications should be tolerated (T), invested in (I), migrated (M), or eliminated (E)
- Identify migration candidates and successors for elimination

Model transformation items to achieve targets



The screenshot displays the LeanIX EAM interface. The main header shows navigation options: Dashboards, Inventory, Reports, Diagrams, Collaboration, and a search bar for 'Jump to a Fact Sheet'. The current project is 'Support Merger & Acquisition of ACNE / Scenario A. Upgrading key components to reduce run costs' with a 45% completion status. A 'New Transformation' modal window is open, listing various transformation items categorized into APPLICATION, INTERFACE, and CUSTOM.

APPLICATION

- Introduce New Application**
Introduce a new Application to several User Groups and/or Business Capabilities.
- Change Application Technology**
Upgrade or replace a technology of an Application
- Rollout Application**
Roll out an existing Application to several User Groups and/or Business Capabilities.
- Discontinue Application**
Move an Application into phase out.
- Withdraw Application**
Remove an Application from a selection of User Groups and/or Business Capabilities.
- Decommission Application**
Move an Application to end of life.

INTERFACE

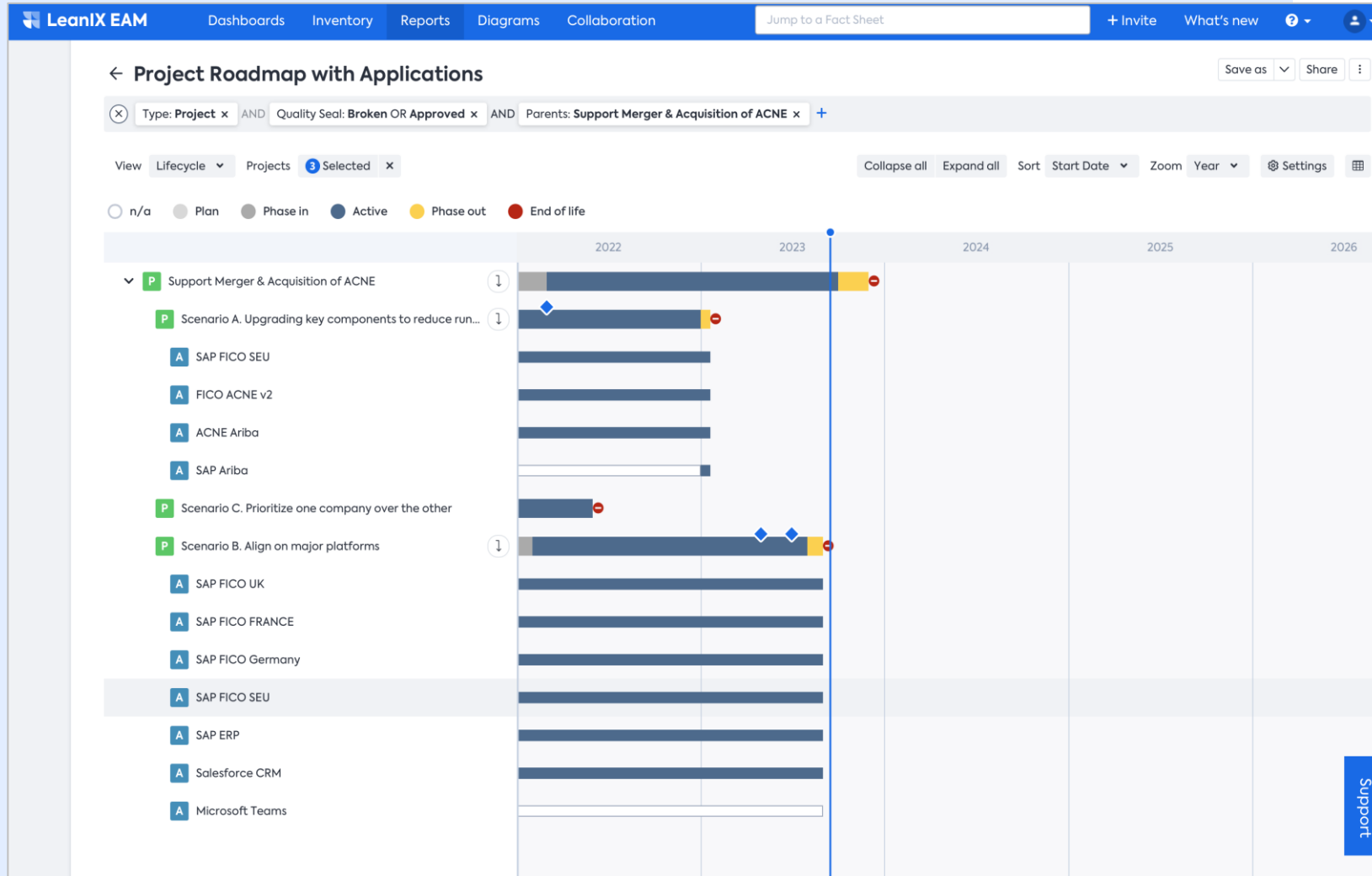
- Introduce New Interface**
Introduce a new Interface.
- Decommission Interface**
Move an interface to end of life.
- Change Interface Technology**
Upgrade or replace a technology of an Interface
- Change Data Transfer**
Change the data that is transferred via an Interface

CUSTOM

- Custom Transformation**
Define impacts freely

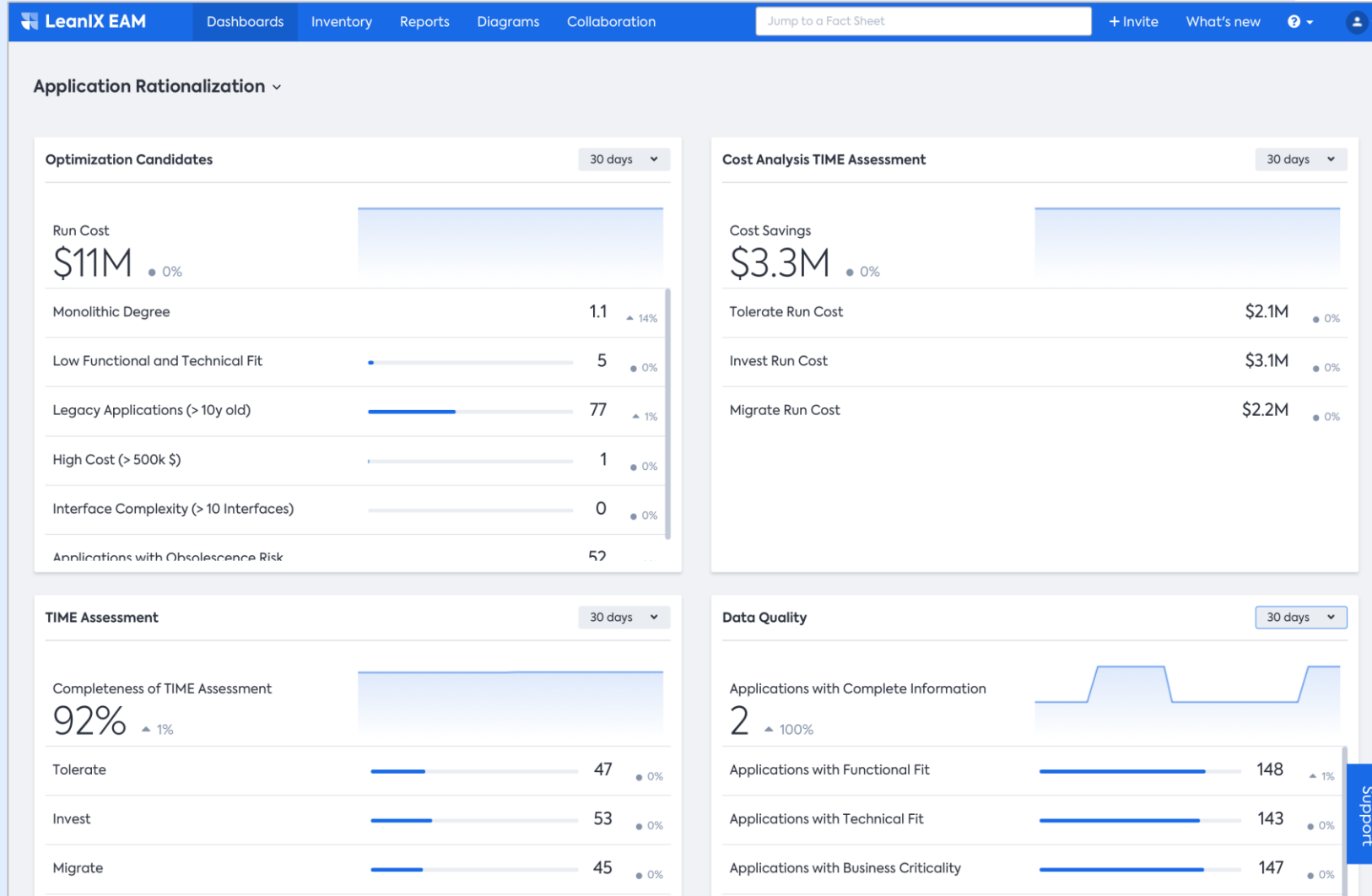
- Model changes to the IT architecture as transformations by leveraging pre-defined templates for typical transformation items e.g. “Decommission Application”, “Introduce New Application” or “Introduce New Interface”
- Compare different transformation scenarios based on the modelled impacts

Build and share the integration roadmap



- Define transformation projects to migrate and eliminate applications taking their dependencies into account
- Plan application rationalization activities in stages, with a focused scope on what will yield the best results, benefiting the most vital business capabilities
- Communicate timelines and impacts to stakeholders
- Share the visualization of the integrated Application Landscape at future points in time

Execute and track the integration project



- Carry out the planned integration project
- Automatically update architecture documentation by executing impacts when projects are completed
- Track project status and measure stages of completion and savings

In summary: What are the key success factors?

Shared Goal

A shared Business Capability Model that the newly merged business is targeting to level-set expectations.

Single View

A single source of truth, consolidating both firms' architectural data in a single view and within one platform.

Workable Data

The ability to work with comprehensive data in various reports, analysis and scenario planning.

Transparency

Reporting KPIs to stakeholders to foster collaboration and gain buy-in as the project progresses.

Speed Matters

Capabilities such as AI, catalogues with reference content, and automations that unlock quick time-to-value throughout each stage is essential.



Follow-Up Resources /CTA

Interested in further information on the subject, here some links to related resources

LeanIX Whitepaper „Streamline Post-merger Integration with Enterprise Architecture“

Link: <https://www.leanix.net/en/download/streamline-post-merger-integration-with-enterprise-architecture>

LeanIX Case Study “How Helvetia Successfully Consolidated Two IT Landscapes in the Nationale Suisse Merger”

Link: <https://www.leanix.net/en/customers/success-stories/helvetia>

LeanIX Blog Post “LeanIX Enterprise Architecture AI Assistant: 4 Use Cases”

Link: <https://www.leanix.net/en/blog/ai-assistant-use-cases>

Or please contact me directly: oliver.klein@leanix.net

Session Feedback

Session Title: Enterprise Architecture
Management | Realisierung von Synergien bei
Post-Merger-Integrationen mit Enterprise
Architecture Management



<https://aka.ms/AzSum-S032>