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# THE SUCCESS OF A MERGER

– Analysis of data migration from legacy software to the ERP software.

BACHELOR'S THESIS | ABSTRACT

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## THE SUCCESS OF A MERGER

- Analysis of data migration from legacy software to the ERP software

The world of business has evolved from its early days of being self-sufficient to now merging with other companies. With the ever-growing technology migrating data from one company to another poses a challenge along with the various other business factors that go into a merger.

Data Migration using ERP software is becoming the new default for companies wanting to move a vast amount of data from one company to another. Businesses are turning from legacy software to ERP software for their ease in everyday company activities at a fast pace, especially in the online world.

The goal of this thesis was to investigate the data migration between two merged companies and to analyze the success of the merger based on data migration from legacy software to ERP software. The companies being referred to in this thesis used legacy software and ERP software and had decided to start the data migration process.

This thesis helps to conclude the success of a merger regarding data migration and how the process and challenges arising from it were faced. The world of business and common occurring mergers is on the rise and the use of software like ERP is on the rise. The future of merger and the data migration caused by it is hard to predict since there is constant advancements in the field of data migration.

KEYWORDS:

Merger, Success, Data Migration, ERP, Legacy software

# CONTENTS

<b>LIST OF ABBREVIATIONS</b>	<b>5</b>
<b>1 INTRODUCTION</b>	<b>6</b>
<b>2 THE THEORY OF MERGER</b>	<b>8</b>
2.1 A merger or an acquisition	8
2.2 Mergers and startergy	9
2.3 Merger process	10
<b>3 SOFTWARE ROLLOUT- ENTERPRISE RESOURCE PLANNING (ERP)</b>	<b>12</b>
3.1 Roll out strategies of ERP software	12
3.2 Implementation procedure of ERP software	13
3.3 Rolling out challenges of ERP software	13
3.4 Cutover planning to stop legacy software and work on ERP software	14
<b>4 ROAD MAP AND EXECUTION OF IMPLEMENTING ERP SOFTWARE</b>	<b>16</b>
4.1 Data extraction and analysis of legacy software	16
4.2 Setting up new ERP environment for new division	16
4.3 Integration of ERP	17
4.4 Data Migration- steps	17
4.5 ERP process documentation	18
<b>5 RESULTS</b>	<b>19</b>
5.1 Integration of system software	19
5.2 Integration of systems – Company AB	20
<b>6 CONCLUSION</b>	<b>23</b>
<b>REFERENCES</b>	<b>24</b>
<b>FIGURES</b>	
Figure 1. Mergers and acquisitions worldwide	9
Figure 2.10- step merger process	11
Figure 3. Data migration four step process	18

## **TABLES**

Table 1: Findings and solutions of missing functionalities

22

## LIST OF ABBREVIATIONS

ERP	Enterprise resource planning (ERP) is a set of modules in a software system that organizes, simplifies, and incorporates corporate operations through organizations.
FG	Finished goods are products that have gone through the production process but have still not been marketed or shipped to an end customer.
ICT	Information and communications technology (ICT) is a concept which highlighted the importance of integrated communications and the incorporation of computer systems along with required business software, to facilitate staff to connect, archive, distribute, interpret, and retrieve data.
SAP	SAP (Systems Applications and Products in Data Processing) is an acronym for systems applications and products in data processing. SAP is both the name of the organization and the name of the ERP (Enterprise Resource Planning) program.
SAT	Software Acceptance Testing is a method for determining if a software framework meets the acceptance criteria specified.
WIP	WIP (work-in-progress) is a supply and manufacturing management concept that refers to partly completed products that are expected to be completed. Manufactured goods, labor, and operating costs for goods at different phases of the manufacturing process are referred to as WIP.

# 1 INTRODUCTION

According to the editor of the online article “Guide to Mergers and Acquisitions” on Investopedia, Adam Hayes defines mergers and acquisitions as a comprehensive term referring to the integration of two or more organizations' operations or assets through a wide range of financial transactions, such as mergers, acquisitions, consolidations, tenders, management, and asset acquisitions. (Hayes, 2021).

As companies and organizations' increasing reliance on technology, any company requires an effective and dependable method for efficiently recording, updating, and tracking data. Data integration has become an exceptionally crucial consideration for businesses today due to factors such as business mergers and constantly evolving economies, which necessitate stability and versatility. Data is frequently interlinked to an organization's business processes. Consequently, changing one or more business procedures often necessitates changing software especially during the merger of companies (OmniSci, 2021).

The business challenge when merging company, is usually that one or the other software environment is outdated. It does not support the business with its needs and necessities which influences the company's financial indicators. Modern ERP software is required for intense flexibility combined with the traceability and transparency within the organization. As company's management decides to replace the acquired company's legacy software with them existing ERP software to have one company process and therefore there is an unconditional need to design and implement the structural solution to support this decision.

There are numerous publications available on data migration and mergers. As the technology in this industry is continually changing, hence the relevancy of a publication could become obsolete in the coming future. However, it can also indeed be researched from a variety of perspectives including technological and economical perspectives.

There have been a few contemporary theses on data migration that deal with equivalent topics. There has been two thesis that have been published regarding data migration. “Migration from ASP.NET Web Forms to ASP.NET MVC (Model, View and

Controller) : case study: K company - promotion email web application” (Nguyen, 2016) and “Data Analysis of an Application Upgrade – Quality Handbook Roadmap from Lotus Notes to Microsoft SharePoint” (Nevalainen, 2012) that have researched about data migration. The former thesis focuses on developing a detailed and easy-to-follow guide for migrating data from the old web forms framework to the new MVC framework. Whereas the latter thesis examines and documents the transfer of the quality manual from Lotus Notes to Microsoft SharePoint 2010, as well as the issues that arose during the move and the experiences of pilot users.

The scope of this work was to design and manage the whole transition and transformation from the existing legacy software data into the ERP software, with efficient and advantageous solution that is going to be the milestone for the company strategy and business for the following years. The programme is highly complicated and consists of multiple layers. By analysing merger literature and research on data migration between software's, a theoretical context is established. Investigating archival documents and data about the transaction, is used to research the data migration at hand.

The theoretical framework is used as a foundation for examining a real-life merger case and migrating their data between two firms but due to the confidentiality reasons cannot be mentioned here, but the companies will be referred to as company A and company B. Also, the merged company will be referred to as company AB This research focuses on understand the data migration between the legacy software and the Enterprise Resource Planning (ERP).

The theoretical structure is divided into three parts. The first section examines the literature on merger to get a better understanding of the phenomena helping to give an understanding of what a merger consists of. Secondly the literature on merger is examined to get a better understanding of the phenomena helping to show the association between data migration from legacy software to ERP software. The thesis's third section begins with a feasibility study for migrating data methods and mapping to the new ERP software. The methods chosen to assess the effectiveness of ERP are presented. Following that, the outcomes of various data collection approaches are discussed. The software's relative performance is then evaluated, as well as the variables that influence it. Finally, the thesis's findings are summarized.

## 2 THE THEORY OF MERGER

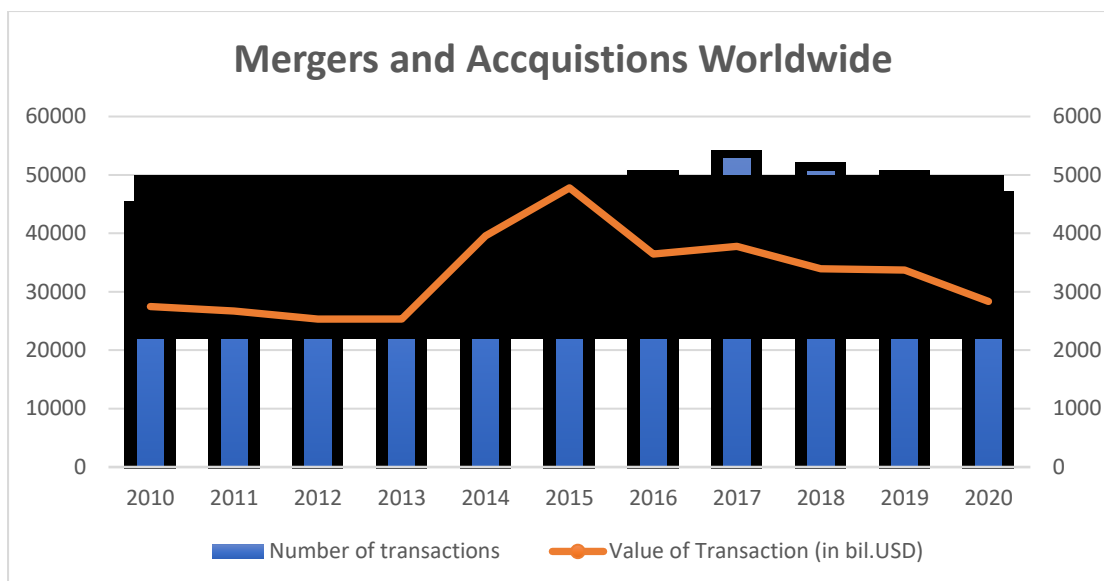
A merger is defined as an arrangement that brings two or more businesses together to form a single entity. There are many kinds of mergers, as well as many different explanations why many businesses combine. Mergers and acquisitions are further used to broaden a business's reach, invest in new sectors, or dominate the market share. All of this is achieved to raise the valuation of the company's stock (Hargrave, 2021).

### 2.1 A merger or an acquisition

Mergers and acquisitions are terms that are often used synonymously. While two firms combine in a merger, the acquirer and the acquiree can be distinguished in an acquisition as, one company acquires another company or a part of it through the payment being cash, securities, or assets of sellers. According to Andrew J. Sherman's book "Mergers and Acquisitions from A to Z" in an acquisition or tender offer, a company asks the shareholders of the firm it is seeking to control to submit their shares of stock of the firm (Sherman, 2014).

Throughout the past decade and from the information compiled by the IMAA institute, we can see a steady rise in the total number of transactions regarding merger and acquisitions. Over the past decade as shown in (Fig.1) this rise in the trend can be attributed to the fact of globalization surge. It shows how merger and acquisition happens globally and is still prevalent in today's corporate world.





Source : IMAA analysis; imaa-institute.org

Figure 1. Mergers and acquisitions worldwide

However, Nate Nead the author of the online post “Acquisition Pros and Cons” helps to contrast the advantages and disadvantages of mergers and acquisitions. Mergers have many benefits, including the ability to retain each party's core competencies and the ability to exchange stock without impacting profits. Complex contract structures and post-deal decision-making are also considered drawbacks. Acquisitions provide greater leverage and flexibility in the sector, as well as transparent governance and decision-making after the acquisition. Acquisitions have drawbacks such as possible hostility, cash or debt requirements and market bidding up the stock price and diminishing the value generated of the stock. (Nead, 2021).

## 2.2 Mergers and strategy

Mergers and acquisitions are often treated as a form of investment activity. The driving principle behind a merger is referred to as mergers and acquisitions (M&A) strategy. The types of transactions that companies and investors seek are determined by their motives. The most popular M&A strategies can be divided into two categories: optimizing financial efficiencies and minimizing risk (Weller, 2019). So, acquisitions

can also be considered as a counterpart to internal development, joint ventures, and licensing agreements as a means of corporate renewal.

However, many scholars often view acquisitions as a means of capturing rather than creating value. Capturing economic value is a one-time event due to the transaction whereas value creation is a long-term phenomenon. Acquisitions should be seen more long-term commitments rather than one-time events. On the other hand, some scholars believe that a merger should be perceived yet another event of a case. According to them, there is a limitless chain of reform initiatives, and a merger is one of the links in that chain. However, there is a possibility if mergers are regarded as one-time occurrences rather than long-term contributors to the transition chain.

### 2.3 Merger process

Mergers have traditionally been regarded as multi-phased processes with various tasks and objectives. Furthermore, reviews from various journals help in dividing these phases into various sub phases. However, Joe Weller has compiled them into 3 major phases that helps to narrow down the huge process of mergers (Weller, 2019).

- i. The **pre-acquisition phase or the planning phase** involves the formulation of an overall acquisition strategy and the establishment of acquisition policies and guidelines. It is divided into three sub-processes: identification of viable acquisition strategies, searching for candidates, narrowing down the candidates, and evaluation of the target. The phase in which the acquisitions are made and managed is decided during this process.
- ii. The **acquisition or negotiation phase** involves planning for the acquisition; assignment of responsibilities; identification, evaluation, and investigation of a potential candidate; negotiating the conditions for carrying through the acquisition; and an eventual conclusion of the acquisition agreement.
- iii. The **post-acquisition phase** encompasses all the steps necessary to bring the acquisition's objectives to completion. During this process, the acquiree starts to integrate with the acquirer.

The aforementioned phases help us to streamline the merger process more efficiently. To further understand the merger process “Corporate Finance Institute” has compiled a 10-step merger and acquisition checklist (Fig. 2) (CFI, 2021).

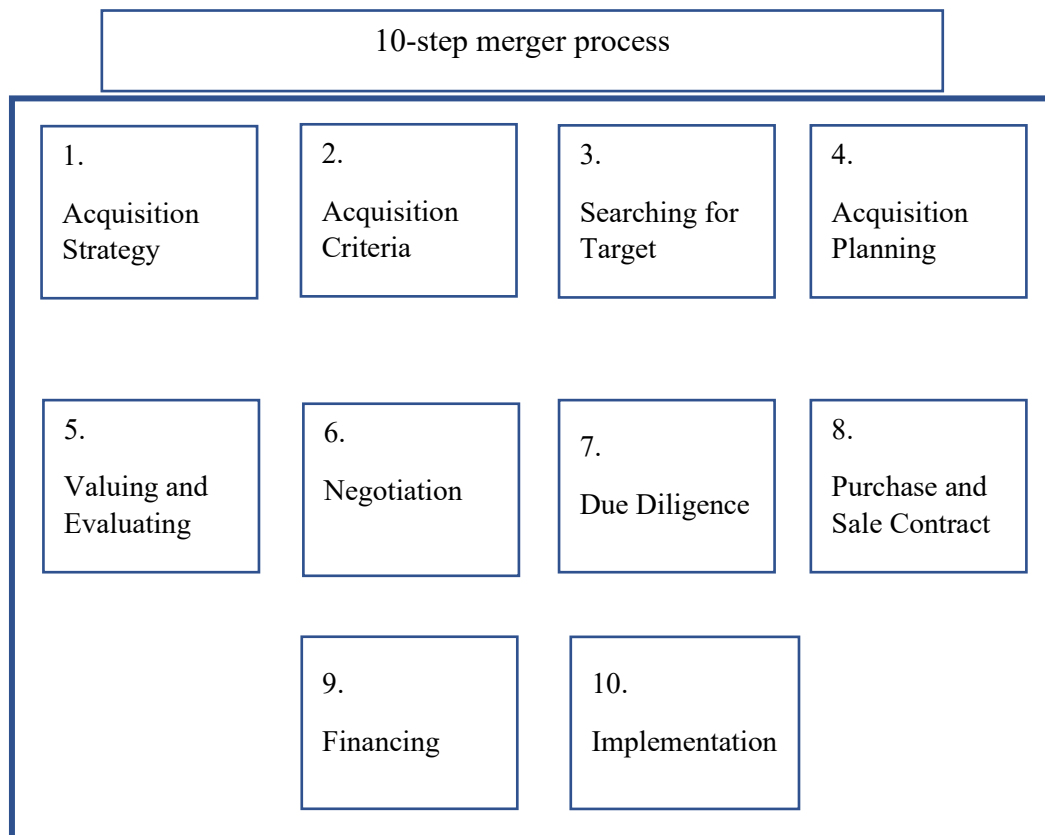


Figure 2. 10- step merger process

## 3 SOFTWARE ROLLOUT- ENTERPRISE RESOURCE PLANNING (ERP)

Enterprise resource planning (ERP) is a software system that organizes, simplifies, and incorporates corporate operations through organizations such as financing, human resources, sourcing, and logistics. ERP programs frequently operate over an embedded computing framework with shared data descriptions and a centralized server (Perkins, 2020).

### 3.1 Roll out strategies of ERP software

From the definition of ERP, we know that implementing an internal ERP structure in an established enterprise is to link its units with more profitable business operations and results, and it is critical that the company owners have a comprehensive understanding of their firm's inner workings. The ERP system rollout often referred to as a major transition that necessitate coordinated actions, and the area of corporate project management (Kenton, 2020). The preparation and procedure describe the advantages that an enterprise can obtain from the ERP system, as well as the roadmap of transition necessary to integrate business functions and practices with the new proposed format (Dunaway, 2020).

Furthermore, ERP rollout strategies can be divided into big bang method or franchising method.

- i. The big bang approach entails deploying all ERP functionalities at the same time. This means that when the old framework is being decommissioned, both users start operating on the updated framework. This strategy also necessitates meticulous preparation and many pre-deployment tasks, such as extensive user testing and a comprehensive backup plan (Mechbal, 2017).
- ii. The franchising approach, entails a gradual substitution of legacy programs, where each singular department in the enterprise gets its own customized system while coupling related procedures, is the most favoured technique for companies when carrying out the current ERP system (FranchiseSoft, 2016).

### 3.2 Implementation procedure of ERP software

In order to understand further, the implementation of the ERP software it can be described generally with the three main stages namely: pre-implementation, implementation and post implementation.

- **Pre-Implementation stage:** This phase is the one of the most essential when it comes to rolling out strategy and planning. Furthermore, the pre-implementation process provides insight into employee behavioural perceptions toward the current structure, such as opposition or participation. In addition, the pre-implementation period includes tasks such as application integration preparation, innovation training, logistics and determining which approach to be used for the transition process (Hustad & Olsen, 2011).
- **Implementation:** Evaluating existing business processes, strategy formulation, streamlining operational processes, upgrading, and checking applications, cleaning, and transferring records, handling transition, educating users, going online, and retaining support are all steps in the ERP deployment process. This process can also be referred to as going live process as it is in this process that the installation of the current ERP framework on a technical level using the preferred deployment process takes place (Ly, 2020).
- **Post Implementation:** Eventually, the ERP deployment system can never be abandoned after the implementation period, believing that the system is operational, the process is finished and could not be suspended. It is where the post-implementation period begins and is a crucial stage in the whole implementation phase. The framework must be checked daily during the post-implementation process to ensure process stability and efficiency, data accuracy (Partners, 2020).

### 3.3 Rolling out challenges of ERP software

With the existing ERP already in use rolling the software out typically necessitates organizational improvements, like corporate organizational culture as the deployment of the project can be time-consuming and expensive. They need constant monitoring to prevent conflicts or disruptions to an organization's systems.

Furthermore, in the ERP structure, certain problems such as project lateness, technological and organizational complexities, or even complete project failure can occur, recognizing the role of user engagement and including any corporate agency at any stage in the implementation process (Luka & Ozkale, 2020). Furthermore, making the user aware and teach the concepts, structure and basic functionality of the ERP business engine is a challenge itself.

Even if an ERP software is well implemented, the software could still cause logistical and security issues. Large enterprises and consumers, on the other side, face several difficulties in terms of the ever-progressing field of programming and the exponential growth, which forces vendors to investigate and research more, designing and customizing ERP goods that are suitable for any form of company and provide a seamless and cooperative atmosphere (Luka & Ozkale, 2020).

#### 3.4 Cutover planning to stop legacy software and work on ERP software

Cutover is a 'gradual progression from one step of a business enterprise or project to another.' It employs techniques derived from a variety of mission backgrounds and consistent with the organization's strategies and practices to improve implementation and management. To put it differently, after a project or product has completed the planning stage, it must go on to the manufacturing stage or another process. It is a critical mechanism that focuses the project on critical tasks that are required to provide a project outcome that can be used by the final consumer (Sharma, 2016).

Cutover planning is the final stage of ERP realization before the company moves on to a new system. From moving from an old system to new ERP application activities need to be tracked in minute details and transactions need to be stopped in the old application for a brief period and moved to the new ERP. The planning is needed to be done in way that there is minimum business disruption. It is important to understand the criticality of the transaction before planning the cutover. When performing the cutover process, things such as sticking to the schedule, and any violations must be reported to the appropriate stakeholders so that appropriate measures can be taken. A successful cutover approach involves active input from senior executives.

A solid cutover approach, accompanied by a cutover plan, is a sign of success in bringing the company brand into the modern environment. It ensures that problems are decreased and managed, and that operations are simple and fast. All the strides expected for transfer have indeed been factored, and risks have been properly accounted for, thanks to meticulous preparation. All threats have been identified, and response plans have been weighed and updated when necessary. Taking all of these things into account can be the steppingstone for the company to ensure its success (Sharma, 2016).

## 4 ROAD MAP AND EXECUTION OF IMPLEMENTING ERP SOFTWARE

### 4.1 Data extraction and analysis of legacy software

One of the key major components of merging legacy software data with ERP software is data. This is because the ERP data analysis software will quickly locate, capture, verify, and transfer related data sets across a production and distribution chain. This enables ERP consumers to be more foresighted than their rivals, resulting in significant improvements in total sales performance over time. (Carlton, 2015). On the other hand, legacy software data extraction focuses more on extracting data from legacy system to the ERP system and directing its data to one or more end users.

To start the process of data analysis and extraction of the existing legacy software, it is important to plan and identify the business dependencies. These include the environmental study which helps in sourcing to target comparisons & mapping business critically. Furthermore, verification scope will help to identify the extent and depth of the exercise being functional or in business and helping in preventing risks regarding testing, analysis, and verification. With these dependencies taken into consideration it can help in having a new setup in the existing ERP. (NetApp, 2021)

### 4.2 Setting up new ERP environment for new division

After analysing the legacy system data mapping, it to the new ERP division. Division is often referred to as the legal entity based in a different country. It is one of the most important steps to have a new setup in the existing ERP environment. For a new setup to work efficiently these things must be taken into consideration:

- Hardware - disk space, networking, infrastructure, and other requirements
- ERP Test and Production environment set-ups for new division.
- Data Assessments- data volumes, data cleaning filing and testing procedures.
- Reviews of modifications, enhancements, interface, localizations.
- Modifications and functionality evaluations.



- Quality process definitions and variance analysis.

#### 4.3 Integration of ERP

ERP integration is the process by which a company's ERP software is integrated into several other modules. Its aim is to achieve that knowledge is exchanged consistently while also optimizing business processes. It is beneficial as it influences the partnerships between ERP applications and other partner programs, allowing companies to tailor and choose the resources they would like in business implementations. (Jenkins, 2020). For the integration to work a few things must be considered:

- Analyse which integrations currently in place.
- Prepare list of integrations to be implemented for automating business processes & eliminates paperwork, workflows, alerts.
- Notifications and Web Services for increase in efficiency.
- Decrease cost.
- Discuss with vendor to set up needed routes for integration.
- Prepare tests cases for integration testing.

#### 4.4 Data Migration- steps

The method of transferring data from one place to the other, through one layout to another, or from one device to another is known as data migration. This would be usually the product of adding a new data structure or site (NetApp, 2021). The basic steps of data migration being streamlined into a four-step process by the Slide Team as seen in (Fig. 3) helps in understanding the data migration process more efficiently. (SlideTeam, 2020)

1. Extracting data from the main source.
2. Transform data from the target system.
3. Loading data into the target system.
4. Validate load data that has been integrated into the target system.

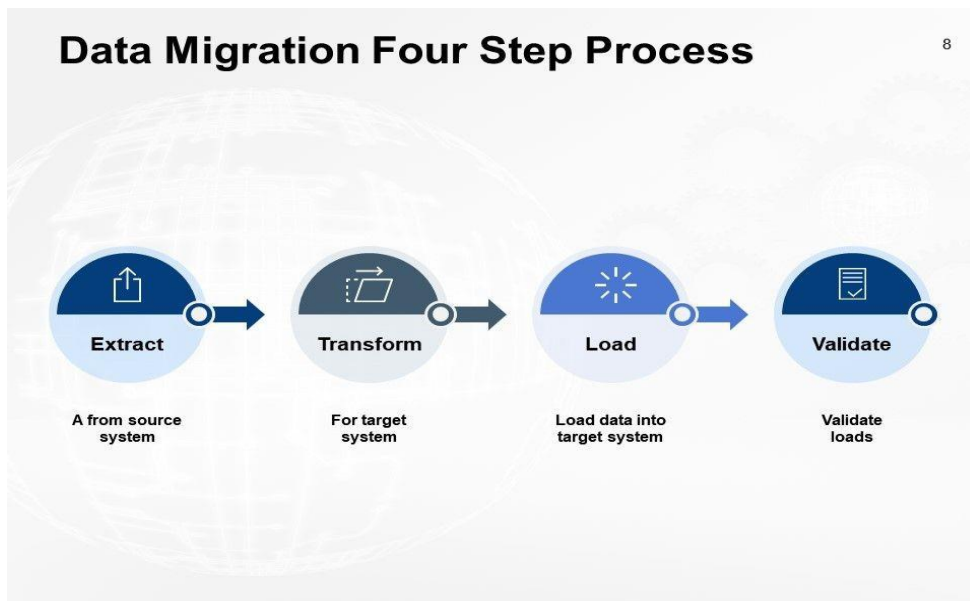


Figure 3. Data migration four step process

#### 4.5 ERP process documentation

An ERP process document lays out the procedures that must be followed to accomplish an operation or procedure. It is an independent, continuous record of the procedure as it happens—the report is more concerned with the "how" of execution than with the "what" of procedure effect. (LucidChart, 2020). The ERP process documentation includes:

- Gathering legacy system customer, supplier, and other document samples.
- Gathering label samples (raw materials, WIP, FG).
- Identifying label variations.
- Documenting what needs to be done.
- Finalize raw material labels, WIP labels, FG labels.
- Document new report needs.
- Prepare new reports.
- Quality reports analysis.
- Reporting needs analysis (logistics, planning, purchasing, production and finance).

## 5 RESULTS

The merger between company A and company B was a planned merger itself. Hence, there was no choice of existing without merging. They were going to merge in any case. In that sense, this merger differs from a "regular" merger, because there was no due diligence or post-merger integration planning focusing on the merger between the companies in question.

The most significant project associated with system integration after the merger was to merge legacy software with the existing ERP. Dependent on pc-networks and language, company A and company B had identical computer systems. It had already been agreed that company A and company B would use the same ERP framework. Company B's legacy system (software) had its own limitation and licencing issues. Pricing, order processing, and order profitability calculations all needed a single structure that ERP could provide.

### 5.1 Integration of system software

In the factories of company A and company B, project committees were formed to assess the factories' requirements and device compatibility, as well as make recommendations on how to proceed and migrate the legacy software data to the ERP. The structures were studied during visits between the factories. Individual mill system or office order handling system of harmonised correspondence, filing, and sales was also established.

Based on ERP in company A and legacy software in company B the missing functionalities were discussed along with the team member together with ICT department. The ICT department helped to conducted extensive data which could be imported from the legacy system and step by step documenting the migration process. Tooling and scripting (where possible and appropriate) for supporting the migration process were also introduced for warehouse stock, open orders, and the balances.

## 5.2 Integration of systems – company AB

The integration operation went fine, according to company AB executives, with no big issues. However, it was agreed that there had been some friction in the post-merger integration process. Coordination of processes and computer systems were among the fields where company AB management had noticed smooth transition. They have their own manufacturing and distribution teams and oversee their own financial results. This arrangement has proven to be very effective. Sharing production between factories, merging distribution departments, and computer administration both admitted that proper operational coordination was still a work in progress, and there was some friendly competition between factories.

The management of company AB had already recognized the need for universal computer systems. Standardization of ordering processes and systems will help to streamline the flow of orders to meet the need for uniform details from sales offices. After the merger, a unification project was started about the forming of a new potential computer system, the project was successful in producing results to produce any significant results. Overall, the merger was regarded as an example of a well-executed merger.

The rollout of the project of merging of legacy software data to the new ERP data had a very tight deadline. Two separate project streams, alignment was to be ensured by project managers; in which one of them was to understand the legacy system and how to merge the existing data into ERP which included all the modules and the other was the business stream. The success of the data migration of the legacy software to the ERP was dependant on the business lead who were responsible to lead and plan the work, i.e., major modules areas that were to be covered.

The missing functionalities of the ERP software were discussed along with the business managers and the ICT department together. Common workshops were conducted, and major issue were addressed individually. These are some of the measure findings and their solutions.

<b>Findings</b>	<b>Solutions</b>
Stock follow up list needs to be checked that it fulfils all local legal requirements, and that the system is corresponding to actual warehouse status.	Training has been provided before go-live to user in terms of how to interpret stock follow up list.
Different journal reports for past 7 years and 2020 – action taken by the local finance team.	Aligned all downloads per team and agreed that user to make a detailed plan on how-to pull-out data from the system. Next follow-up agreed with user to take place.
Sales invoices should have total invoice value and tax base where domestic cash discount should be deducted. The tax amount is calculated from this tax base. Cash discount should also be visible on the invoice. In according to local Belgian tax legislation.	Programs were modified as country specific requirement, tested and verified in test for invoice with one order header. Also tested that the changes have not affected other invoicing (EU, export, credit notes) the issue needs to be carefully monitored at go-live.
Customer service creates “preliminary” delivery note to indicate produced lots to be delivered and proforma is issued against that delivery note. Customer pays this prior to shipment and the actual invoice after shipment then matches proforma automatically.	Old and new templates were compared, and the changes were done using were monitored on go-live.
In case customer credit limit exceeds or invoices are too long overdue, Finance sets up customer block. This customer block can have different levels we do not have in ERP.  For example: - prevents order entry.	Training was imparted to the user for how to handle it in ERP for customer stop process.

<p>- prevents invoicing. - prevents shipment.</p>	
<p>Manufacturing order process is different in ERP than in current legacy system. Process steps need to be gone through and areas of responsibility to be decided upon.</p>	<p>Responsibility was defined: 1. Orders closing. 2. Job costing calculation.</p>
<p>Finished product stock is not at a lot level.</p>	<p>Production people were told to keep the track of stock manually in excel and the same data was to be migrated in ERP.</p>
<p>Current labels only show batch number. Does not seem feasible to report and label single reels.</p>	<p>3D bar code was used to handle the same.</p>
<p>How to handle customer inquiries, trying to find possible delivery dates, before they become customer orders?</p>	<p>Solution was to temporarily reserve capacity or to handle outside it the system.</p>

Table 1: Findings and solutions of the missing functionalities

## 6 CONCLUSION

The main aim of this thesis was to analyze the success of a merger by analyzing data migration from legacy software to the ERP software in which factors dealing with the data migration between two merging companies are discussed. Also looking into the process and the consequent challenges that could arise from data migration.

To begin, literature on mergers in general and merger effectiveness was examined to gain a better understanding of the phenomena. Following the theoretical section, data for the observational section was gathered by the study of archival records and reports were also included. According to the thesis's findings, the merger was a positive in terms of economic growth and strategic positioning, as well as regarding the ease of data migration from one company to another.

Also, theoretical study of migrating data methods and mapping to the new ERP software are also discussed. The methods chosen to assess the merger's effectiveness are presented. Following that, the outcomes of various data collection approaches are discussed. The merger's relative performance is then evaluated, as well as the variables that influence it. Finally, the thesis's findings are summarized.

However, this thesis also concerns various other aspects of data migration between the merged companies. To maintain the data migration a success the companies have to also work on other factors like investmemodmodnt, ease in user interface and keeping all the employees happy, but the thesis focuses more on the transition from legacy software to the ERP software between the companies.

To conclude this thesis helps to identify how the success of merger in regard to data migration can be and can be simply used as a case study to see the how the process and challenges that were faced discussed. However, it should be noted that the thesis focus was a peculiar and special merger event, and its external validity is debatable. More time is also needed to know the true effects as this thesis poses the data of the time of the merger between two companies and the initial transition and challenges faced. As it progresses it can be successful or vice versa. But, if the effects of this merger are to be generalized in the context in which it occurred, special caution should be exercised.

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