

The logo graphic consists of a dark blue stylized 'C' shape on the left, an orange double-headed arrow pointing up and down in the center, and a dark blue stylized 'F' shape on the right, all set against a light grey background.

COPAF
CONSULTING

Business Analysis in Pension Fund Merger

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Business Analysis in Pension Fund Merger

Context

A large pension fund acquired a smaller entity. COPAF Consulting provided pre-merger support to align IT and business process across organisations.

Primary goal was to keep operations running during the acquisition, while identifying gaps, improvement opportunities and post-merger synergies.

Objectives

- **Identify IT-components embedded in business processes:** who uses which application for what purpose
- Align IT and business processes with the target-state to **ensure day-to-day operations remain uninterrupted**
- Collaborate with Compliance to **harmonize IT risk and control frameworks**, capture improvement opportunities and best practices

Approach

- Facilitated cross-entity workshops with IT and Operations to align processes and dependencies
- Documented the IT-application landscape and related business processes within project scope
- Delivered gap analysis on IT, risks and controls and impacted business processes

Lessons Learned

- Early involvement of Solution Architect avoided unnecessary migration of duplicate IT-applications and processes
- Preserving best practices (tooling, business processes and IT-applications) within the acquired entity retained valuable operational know-how
- Visualising the IT-landscape and interfaces improved workshops effectiveness and accelerated alignment

***Key takeaway:** this experience showed that merging entities demand double verification, double alignment, double communication and double confirmation to succeed.*





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