

# M&A STRATEGIES: DIGITAL ASSET INTEGRATION\_

Best Practices for Better Outcomes

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## INTRODUCTION

*When companies combine resources through merger and acquisition (M&A) activity, significant efforts are undertaken to plan for the transition of physical company assets and operations. These strategic efforts create a blueprint for integration, with an eye towards profitability, efficiency, and risk mitigation. Similarly, the efficient transition of digital assets should be a high priority.*

*This volume discusses the digital assets that require identification and management to ensure a more seamless integration of the merged organizations.*

*Today, in almost every industry, a company's digital assets are integral to its delivery of goods and services, as well as its marketing and sales efforts. Websites, apps, and social media are drivers of online brand presence, while email, VPNs, and VoIP networks are essential tools for both internal and external communications. Lead-generation programs, customer relationship management systems, and marketing automation solutions, which are dependent on the availability of digital assets, are also fundamental to the conduct of core business operations.*

*This paper will outline the broad challenges of merging, managing, and securing digital assets when two or more business organizations are being combined. Further, it will address various factors that can help companies leverage best practices, streamline workflows, and avoid business interruptions, while also integrating digital resources such as websites, digital campaigns, social platforms, and related digital assets.*



## MACRO VIEW

Planning for digital integration requires top-level assessment of each business entity's digital assets, in order to support branding requirements and strategic objectives. Based on this "big-picture" assessment, recommendations can be made to guide the digital integration processes that are necessary to realize best practices and achieve efficiencies, while creating the best possible user experiences for customers, prospects, and social media followers.

### **Branding**

Many moving parts are at work during the M&A process. Branding is one of the most critical and time-sensitive components, impacting company culture, marketing, sales, and operations. An early awareness of changes in brand messaging and strategy will help guide many of the other processes involved in digital integration. Rebranding early in the process

helps avoid chaos and confusion, establish brand momentum, and facilitate employee and customer transitions. A strong branding direction, based on a clear vision of the new entity, helps stakeholders get on the same page, with the least amount of disruption to normal business activities.

### **Marketing Assets**

Merged entities may find themselves dealing with an overwhelming influx of marketing assets, and it is important to establish good management practices to facilitate the collection and rapid sharing of these assets. Consider establishing a single brand portal to centralize and organize digital assets. Grant stakeholders access to updated content in a system that is easily managed. (See our *Digital Integration Checklist* for a list of marketing assets that will need to be managed.)



### **Company Websites**

A full assessment of digital assets will include a review of all company websites, links, listings, reputational content, and associated information found on the web. One aim of decision makers will be to capitalize on the best practices of each business entity. The integration of branding, messaging, and functionality across digital channels can provide significant momentum for the new organization going forward. In addition to content, the assessment should include analytical data such as SEO reports, conversion rates, and related metrics. Recommendations may emerge for the integration of content, functionality, or features that will guide teams in the development of post-merger strategies.

### **Social Media Accounts**

A review of each entity's social media programs is essential for gaining insight into follower communities, engagement levels, and overall best practices. An analysis of past campaigns will shed light on prior successes and show which social strategies produced the best results. Campaign budgets, targeting, and responses should be analyzed. Access to prior campaigns should be secured in order to leverage content and statistics on an ongoing basis. What can each organization's social media programs learn from the other? How will tone, feel, or content be different going forward? Developing a new social media strategy and defining the transition will enhance post-merger social media efforts.

### **Digital Advertising Programs**

A review of digital display advertising, PPC, and video ad campaigns — and related targeting strategies and results — will bring existing best practices from each of the merging entities to the forefront. The development of fresh guidelines and strategies, based on findings and post-merger considerations, will provide a springboard for more effective digital advertising moving forward.

### **Email Platforms**

The successful integration of email platforms is more than just an IT issue. By establishing clear processes for employees, managers can ensure enterprise-wide compliance with branding standards, electronic signatures, and external links contained in company-wide emails for both business-facing and consumer-facing audiences. By reviewing email address format/conventions, a plan for consistency can be determined. (Find more info in our *Digital Integration Checklist*.)

### **Marketing Systems**

Finally, a review of marketing automation systems, customer relationship management systems, outbound e-mail marketing services, and related applications, will reveal areas in which systems duplicate and/or complement each other. This review will further ensure that marketing operations continue without interruption. The process may also give rise to potential strategies and pathways for data and process migration to the platforms of choice.



## MICRO VIEW

With the big-picture topics covered, there are a number of critical details to be reviewed and analyzed relative to the new combined entity. Small details pertaining to digital asset integration are critically important.

Maintaining accurate, up-to-date information regarding digital assets is key to any successful integration effort. This information should be documented and retained in a safe and secure location. We recommend creating a full inventory of digital assets, access privileges, management assignments, security layers, etc., while also cataloging all digital assets across the enterprise. (Please see our *Digital Integration Checklist* for more information.)

### Domain Names

Create an inventory of the domain names owned by each company and inspect each for any risks or online threats, including ownership issues, security gaps, and online reputational content. Identify domains that are critical for business, those registered for defensive purposes, those used for login or test pages, and those used for other purposes. Document all domain name registrations and ensure that there will be at least three people in your organization having access to that information.

### Domain Name System (DNS) Providers

Evaluate your DNS provider(s). Are the providers reputable, with easy access to the services you need? Verify the use of a robust Distributed Denial of Service (DDoS) solution. In order to defend against techniques that hackers use to direct computers to rogue websites and servers, make sure that Domain Name System Security Extensions (DNSSEC) are in place.

### Domain Registrant Reporting

It is necessary to report to the domain registrar any changes pertaining to the technical and administrative contacts who are authorized to represent your business organization. This reporting includes any names, addresses, email addresses, or telephone numbers that have changed as the result of the merger or acquisition.

### Digital Certificates

Identify all Secure Socket Layer (SSL/TLS) digital certificates and determine the types of certificates you are using. Review current renewal and automatic reissue status. Verify the use of Certificate Authority Authorization (CAA) records in order to establish which certificate authorities can issue SSL/TLS certificates for your domain. Consider consolidation if multiple providers are involved.

### Social Media

Catalog all social media handles and profiles/pages, and evaluate each for compatibility with branding objectives. Determine if restructuring or revisions are needed and adapt or consolidate social media pages as applicable. Document login details for all social media accounts, and update accounts to ensure that only authorized users have access. Verify that social media accounts are tied to the correct website. Develop a plan for instructing employees as to which social media profiles they should be aligned (e.g., LinkedIn “Experience” links).

### Marketing Systems

Identify and consolidate users for all marketing automation, CRM, email marketing, and related systems by requesting details from employees and making any changes necessary.



## OTHER CONSIDERATIONS

Throughout the digital integration process, additional due diligence is advisable across the full enterprise. The following areas of focus can help the new organization operate in an efficient, streamlined, and risk-managed manner.

### **Security**

Review all security protocols across your digital assets in order to prevent the potential for domain hijacking, hacking, or unauthorized changes. Verify the use of two-factor authentication. Ensure that a “registry lock” is in place for all vital domains.

IT departments should ensure that proper documentation exists for access to antivirus programs, management software, accounting software, wireless access points, switches, and firewalls. A software license audit is further recommended.

### **Reputational Content**

Conduct research to identify third-party websites (review sites, associations, directories) where your company names appear. Create a directory of these sites for future reference. Contact the sites with any changes to company information. Monitor the sites regularly and respond rapidly to negative reputational content.

### **Vendors**

Create a database of current vendors involved in the management of digital assets. Evaluate these vendors carefully, and follow-up with a plan to consolidate vendors where appropriate.

Creating a full accounting of your digital assets helps determine which assets to keep, which to divest, and how to update, rebrand, and manage surviving digital assets. The process of documenting your digital asset portfolio requires time, persistence, and an eye for detail. To assist in this effort, consider enlisting the help of legal resources, IT teams, marketing personnel, and management.

With experience in M&A-related digital asset integration, Triad B2B Agency can assist M&A teams in the review of enterprise-wide digital resources, offering assessments of branding, content, and website metrics, along with recommendations to drive strategic planning. Our digital team can also assist with the details of digital integration, using resources and processes to help guide your team, laying the groundwork for the post-merger success of your digital business.

**Get in touch to request our *Digital Integration Checklist*.**

## GET IN TOUCH

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