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Post-Merger IT Integration (PMI) Checklist

Day-1 Continuity, Identity and Network Isolation, Tenant Consolidation, and TSA Exit Governance

ACQUISITION NETWORK AND IDENTITY RULE

Do not bridge an acquired network directly into corporate routing on Day 1. Confirm administrative account control, deploy endpoint detection, verify immutable backups, and establish identity and IP-subnet visibility before interconnecting environments. Set phase deadlines from your transaction agreement and Transition Services Agreement (TSA) schedules using the companion .xlsx / .csv tracker.

1. Phase 1: Pre-Close Escrow and Day-1 Continuity

- [ ] **Administrative Account Escrow:** Verify domain registrar, authoritative DNS, cloud payer accounts, M365/Workspace Global Admin, and firewall credentials.
- [ ] **Break-Glass & Emergency Contacts:** Create dedicated emergency admin accounts with hardware MFA and confirm Day-1 escalation contacts across both IT teams.
- [ ] **Endpoint Visibility (EDR):** Deploy endpoint detection and response sensors across acquired servers and workstations.
- [ ] **Immutable Backup & Restore Check:** Confirm off-site immutable backups exist for acquired ERP, financial databases, and file shares, and test an isolated restore.
- [ ] **Day-1 Mail & Calendar Coexistence:** Enable mail forwarding, address-book visibility, or calendar sharing without rushing a premature MX cutover.

2. Phase 2: Security Baselines, Isolation, and TSA Mapping

- [ ] **Privileged Access & MFA Audit:** Enforce MFA on all acquired accounts, disable legacy Basic/IMAP authentication, and remove departed personnel accounts.
- [ ] **Subnet Overlap & Controlled Access:** Inventory RFC1918 IP ranges and firewall rules; publish required applications via explicit rules or application proxy prior to WAN peering.
- [ ] **Software, Circuit & Renewal Inventory:** Catalog SaaS contracts, on-prem licenses, ISP circuits, and auto-renewal notice deadlines.
- [ ] **TSA Service Schedule & Fee Tracking:** Record every Seller-hosted shared service, monthly TSA charge, notice window, and technical exit prerequisite.

3. Phase 3: Tenant, Application, and Data Consolidation

- [ ] **Email & Collaboration Migration:** Pre-stage mailboxes, OneDrive, and SharePoint sites; validate a pilot group and execute scheduled DNS/MX/SPF/DKIM/DMARC cutover.
- [ ] **Workstation MDM & Encryption:** Enroll endpoints into unified device management, verify BitLocker/FileVault disk encryption, and align OS patch rings.
- [ ] **ERP, Finance & Reporting Alignment:** Map chart-of-accounts, vendor/customer records, and automated reporting pipelines with finance sign-off.

4. Phase 4: TSA Exit, Archival, and Decommission

- [ ] **Regulatory & Legal-Hold Archival:** Preserve historical mail, tax, financial, and regulated records under applicable retention rules before canceling legacy tenants.
- [ ] **Formal TSA Exit Notices:** Confirm standalone operation of carved-out workloads and deliver timely written TSA termination notices.

[ ] **Secret Rotation & Billing Closure:** Rotate inherited Wi-Fi, VPN, database, and API credentials, and close retired cloud, colocation, and SaaS billing accounts.

5. Integration Milestone and TSA Exit Sign-Off

Workstream / TSA Schedule	Integration Owner	Agreed Target Date	TSA Exit Notice Sent	Verified By & Date
[Identity & Email Consolidation]	[Name]	YYYY-MM-DD	[ ] N/A [ ] YYYY-MM-DD	[Name / Date]
[ERP & Financial Systems]	[Name]	YYYY-MM-DD	[ ] N/A [ ] YYYY-MM-DD	[Name / Date]
[Network, Hosting & Decommission]	[Name]	YYYY-MM-DD	[ ] N/A [ ] YYYY-MM-DD	[Name / Date]

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