NUMATA

CASE STUDY

DAYONE+ VALUE

Merger integration, then a clean carve-out of the consulting arm.

Two transactions, one team behind the plan: first a merger integration into a larger professional services group, then a clean separation of the consulting entity years later.

MERGER INTEGRATION, LATER ENTITY SEPARATION / PROFESSIONAL SERVICES / SOUTHERN AFRICA

AT A GLANCE

2	4-week	Full
Transactions supported: merger integration and later entity carve-out	Migration window covering M365, file server, practice and audit data	Security uplift: MFA, Conditional Access, EDR, DLP and managed backups

Two transactions, one team behind the plan: first a merger integration into a larger professional services group, then a clean separation of the consulting entity years later.

THE CHALLENGE

A regional accounting and advisory firm was integrated into a larger professional services group. Years later, the consulting entity had to be separated back out. Both events had to keep client-facing teams productive across Microsoft 365, practice management, audit tooling, network, print and telephony, without disruption to live engagements.

OUR APPROACH

01 Treated each transaction as its own programme, but re-used the same governance, cadence and evidence discipline.

02 Mapped every shared system, licence, credential and data set before any cutover was scheduled.

03 Kept a single owner accountable across both events so institutional memory did not evaporate between them.

04 Landed the target end state on a modern, secured Microsoft baseline both times.

WHAT WE DELIVERED

- Merger: Microsoft 365 consolidation, file-server and practice-management migration, security uplift and network integration.
- Carve-out: independent tenant, identity, audit data extraction, licensing separation and managed services stand-up.
- MFA, Conditional Access, EDR, DLP and managed backups applied in both target states.
- Runbooks for practice, audit and client-facing teams so no billable engagement lost a working day.

> “Two very different transactions, one team behind the plan each time. Our accountants never lost a working day.”
>
> MANAGING PARTNER, REGIONAL PROFESSIONAL SERVICES FIRM

WHAT WE TOOK FROM IT

01 The value of institutional memory between transactions is only obvious after the second one.

02 Practice management and audit data live longer than any tenant. Plan the export before the merger, not after.

03 A carve-out is not the reverse of a merger. The controls have moved, the people have moved, the data has grown.

ABOUT NUMATA

Numata is a business technology services and solutions provider for small and mid-sized enterprises. We align technology to business outcomes across IT strategy, cyber, data, operations, modern work and AI, delivered through NumataOne™, our strategy enablement framework.

Speak to the team: numata.co/contact