Final Project report
MBA614

OD&L Repository for M&A

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Executive Summary:

Organization Development and Learning is a Human Resource Specialty which is a deliberately planned, organization-wide effort to increase an organization's effectiveness and/or efficiency and/or to enable the organization to achieve its strategic goals [1]. Over my internship, I and my team were asked to build a tool for this department which will be used by HR people assigned to a Merger/ Acquisition (M&A). M&As are complex; although they happen all the time, yet study after study puts the failure rate of mergers and acquisitions somewhere between 70% and 90% [2]. HR Processes play a big role in the success of M&As. With the organization that I interned with, the problem was there was no standard repository to guide HR generalists, HR Directors, or even business managers to guide through the process. Everyone acknowledged that the issue is important and needs to be handled, and HR people involved in previous M&As had made tools, gathered best practices for themselves, but they were not managed centrally, and learning was not being shared. My internship team created a model of the 'would be OD and L repository' after interviewing and collecting data from more than 50 people. I recreated the toned down version of the same repository.

1. Best Practices repository

Important ODnL processes in M&As are	**M&A process timeline may be segregated as:**
1. Change Management 2. Culture 3. Organizational Design 4. Communication	1. Due Diligence (Pre-integration) 2. Integration Planning (Pre-integration) 3. Month1(Year of Integration) 4. Months 2-12 (Year of integration)

These two dimensions are captured in the tool using a 2*2 matrix format. The processes that fall at the intersection of these dimensions are fetched and displayed from the already existing database. See this figure for the sample. Only the first row has actual phases as there might be some legal bindings

Phases / Processes	Due Diligence	Integration Planning	Month 1	Months 2-12
Change Management	Change management	Change Set up	Change Implementation	Change maintenance
Culture	Not Provided	Not Provided	Not Provided	Not Provided
Organizational design	Not Provided	Not Provided	Not Provided	Not Provided
Communication	Not Provided	Not Provided	Not Provided	Not Provided

*****Implementation also has been done for the first row (Change) only.***

2. ‘Submit Best Practices’ tool

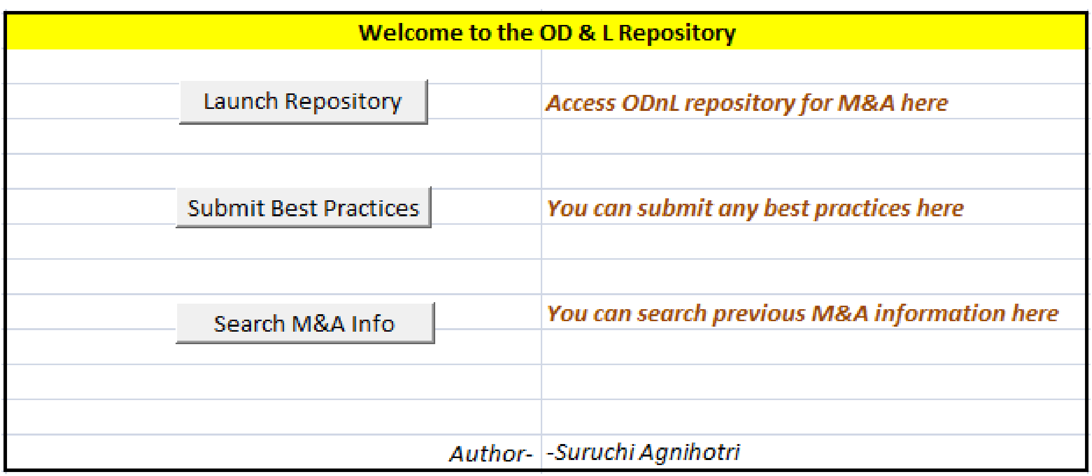
After an M&A is finished, it is required for the HR personnel involved in that particular project to submit all the best practices or any new learning. The ‘Submit Best Practices’ Tool provides an interface for the HR personnel to accomplish this task. The person in the role submits best practices through the tool, which got to a ‘Draft data’ sheet, which is later analyzed by the Repository admin. Repository admin is notified via email on any new submission. The process of looking at submissions and adding to actual excel database is a manual process (looking and judging the validity of submission, removing duplications, adding in proper format). It is out of scope of this project.

3. ‘Search Merger Information’ tool

When a new HR person is assigned to an M&A project, he/she might need information about the previous M&As of the company, and the people involved in that. This is a very useful process for learning. Search merger Information tool lets the user search on the basis of Region, Merger Type, Year, or a combination of these. The search returns corresponding M&A names, and on selecting a merger name and searching further, Merger Details are shown. No editing is possible on this tool.

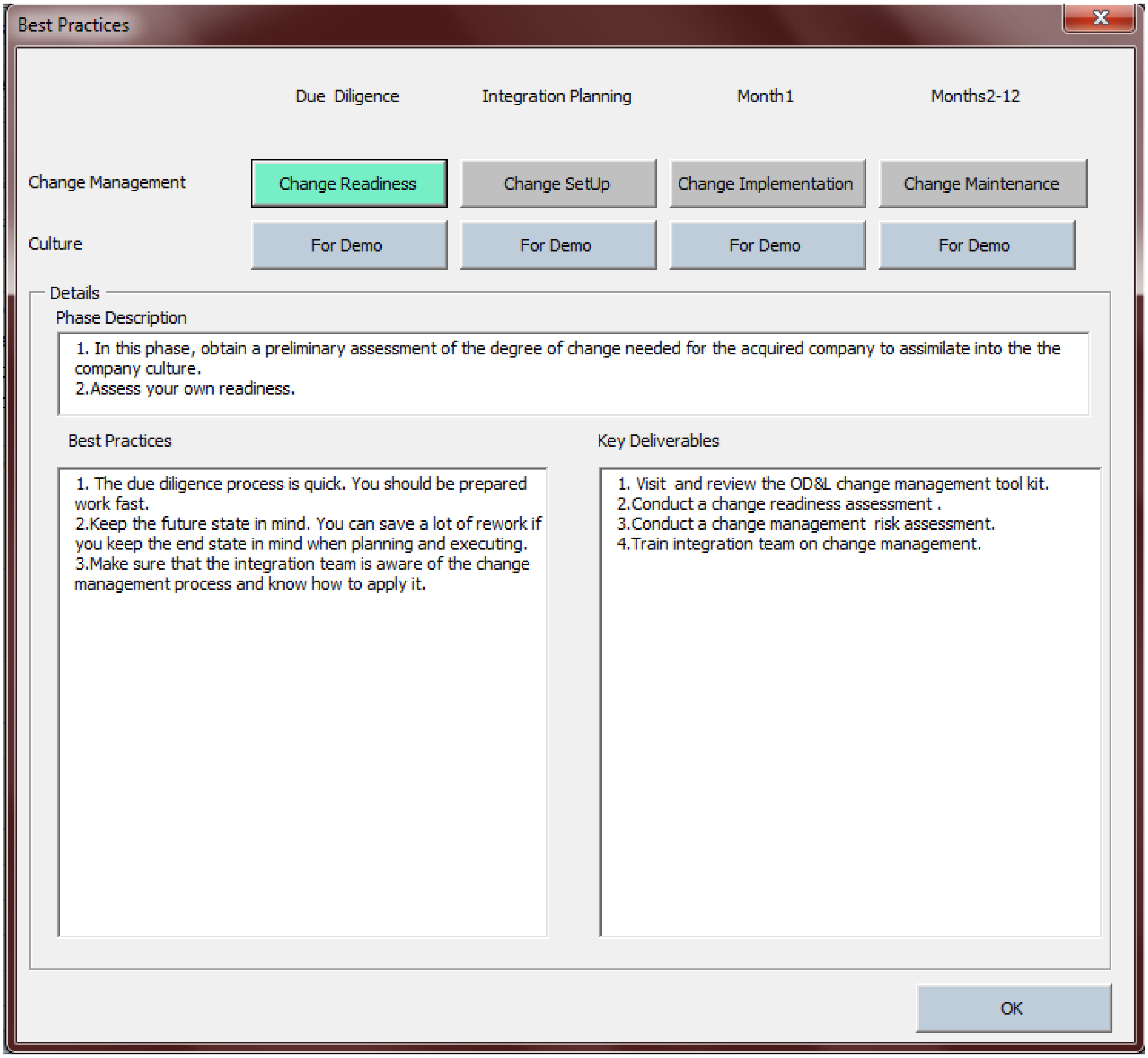
Implementation:

Worksheet Main – This worksheet has the buttons to launch all the forms



1. ‘Launch Repository’ Button- Launches the form frmBestPractices
2. ‘Submit Best Practices’ button – Launches frmSubmitBestPractice
3. ‘Search M&A Info’ button – Launches frmSearchInfo

frmBestPractices:

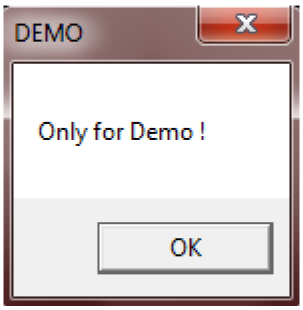


As seem in this image this form contains buttons for all the processes. If the user wants to know the process of ‘Change Management’ in ‘Due Diligence’ phase, he presses the intersecting button called ‘Change Readiness’.

On clicking this button:

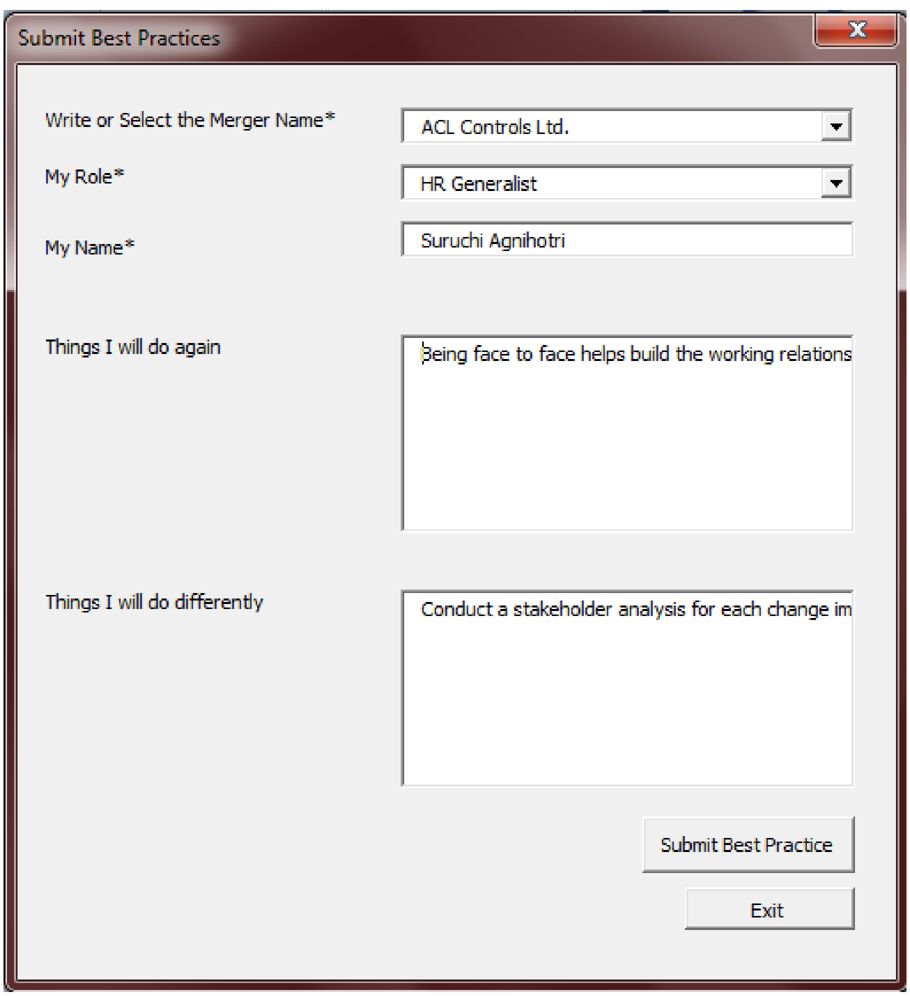
1. Color of the button changes to highlighted
2. Following text boxes are populated with the data present in the ‘Change Readiness’ sheet. Also the Serial numbers are added to individual cell values
   - txtDetails, txtBestPractices, txtKeyDeliverables

If another buttons are clicked, data corresponding to them is shown. The older button comes to its default color and the new button is highlighted.*This screen is scalable as Different rows can be added. I have added the second row 'Culture' for demonstration purposes.For now, when the user presses 'Demo' button it shows*

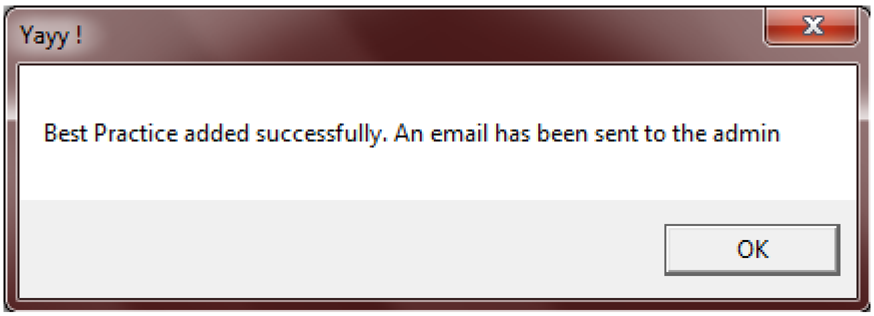


cmdOK button unloads the form and takes the user to the 'Main' worksheet again.

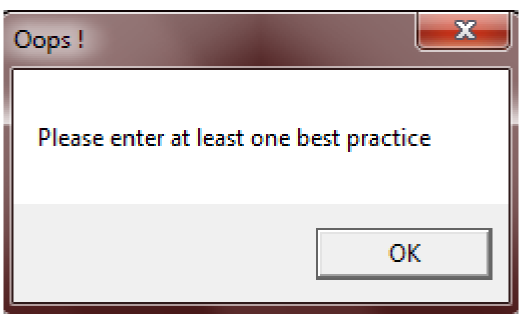
<u>frmSubmitBestPractice</u>



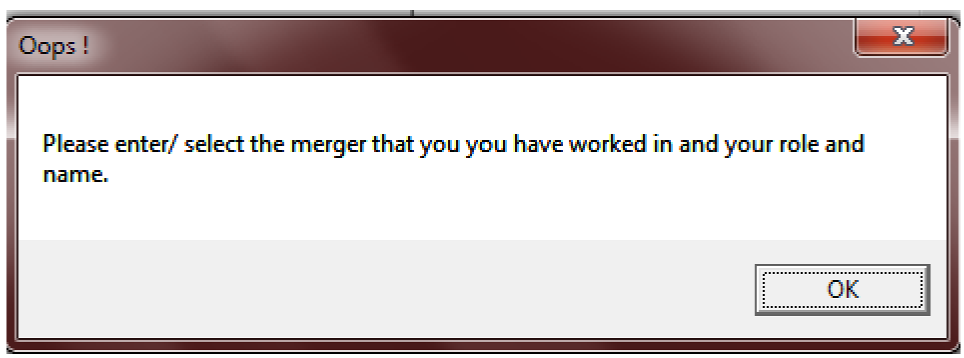
- cboEnterMergername- Picks Merger names from ‘Merger database’ Worksheet. User can also enter a new merger name here
- cboMyRole- Picks predefined roles from ‘Master Data’ Worksheet.
- cboMyName- User has to enter his her name here.
- ‘txtDoAgainThings’ and ‘txtDoDifferentlyThings’- User fills data in these. One of them is mandatory
- cmdSubmitBestPractice- Saves the data into ‘Draft Data’ worksheet. It also sends email to the administrator email id which is picked from the ‘Master Data’ Worksheet. The mandatory fields are nor cleared in case user wants to add more data.



- cmdExit- Unoads the form and takes the user to the ‘main’ sheet

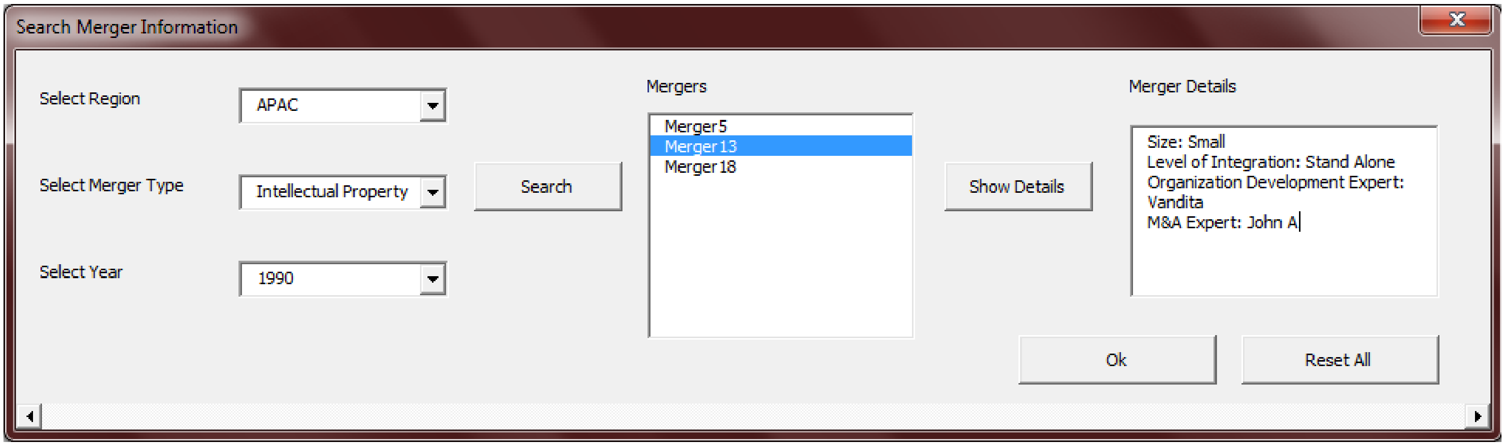


This is shown if user tries to submit without filling any data

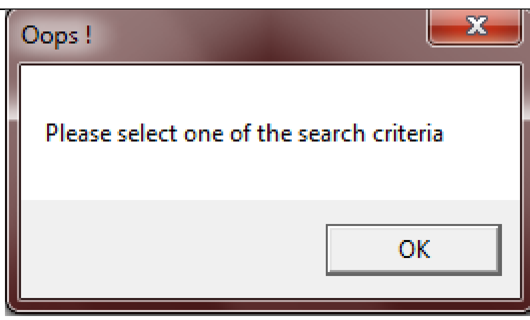


This is shown if user submits without filling mandatory fields.

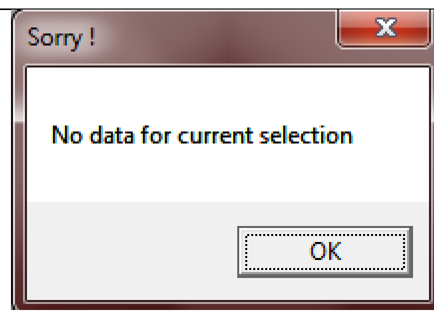
frmSubmitBestPractices



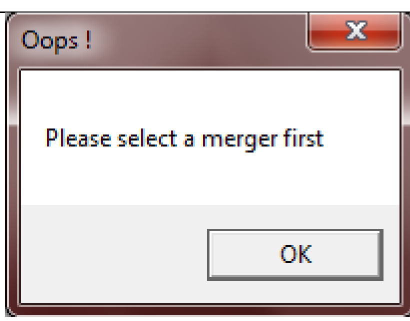
1. cboRegion, cboMergerType, cboYear- Pick data from 'Master data' worksheet
2. cmdSearchInfo- Searches the 'Merger database' worksheet and fills the data in the lstMergers
3. User can select one merger at a time and click the button 'cmdShowDetails' to see the details in 'txtMergerDetails'
4. cmdOkaySearch ('Ok' button) unloads the form and takes the user to the 'main ' worksheet
5. cmdReset (ResetAll button) resets all the fields for the user to start all over again.



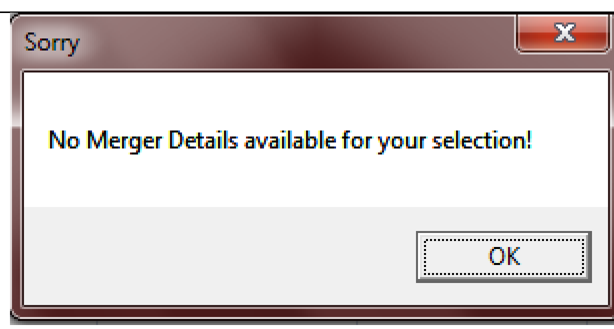
This error message is shown if user presses Search button without selecting any criteria



This error message is shown in the no mergers are present for his criteria



If user presses Show button without selecting a merger, this message is displayed



If not details are present for the selection, this error message is displayed

Learning and conceptual difficulties

1. This project gave me confidence to work with the user forms. The user form homework was very difficult me and I was initially thinking that probably this project is not suitable for me.

2. I could not modify the excel ribbon to add the buttons to run my code. I took help from all 4-5 people who have used this functionality for their projects, but to no avail. As I am submitting my project late, I took an alternative to adding buttons on the worksheet rather than the ribbon.

3. There was a piece of code where I had to fill a text box after appending data from so many cells, and also adding serial numbers to them. I used a loop and then If statement. This was particularly difficult as no one format would serve the purpose. I had to make 3 conditions to actually append the serial number in from of the text line and also add the new line character.

4. In Search Info Multiple search criteria were a challenge as well. Initially I could not construct if statements for 'at least 1' condition and thought that it will require 8 ifs, but later I figured it out.

5. I wanted to redirect the user to the 'main' worksheet after closing every form. I have done that for all the forms that I have added, but could not do that for the 'Cross' button on the top right corner. Code available on the internet looked too cumbersome.

Help from other people

I actually wrote all the code by myself except for the email code that was taken from one of the classes. I seeked help for modifying the ribbon, but that did not work out.

References

[1] http://en.wikipedia.org/wiki/Organization_development
[2] http://isites.harvard.edu/fs/docs/icb.topic957120.files/Articles-By%20Chapter/Chapter%201%20Readings/Big%20Idea_%20C.Christensen.1.pdf