



Mergers & Acquisitions Checklist

When going through a merger or acquisition (M&A), the pain is in the details. It's essential to have all the right players, requirements, and integration points in place when combining or moving travel and expense policies or configurations between companies. Use this handy checklist as a guide to ensure that no detail is left unexplored.

Products & Services	Company A	Company B
Determine all products/services Contract term dates Transaction volumes		

Travel	Company A	Company B
Current TMC & contract details Future TMC & contract details Define process to migrate users & contact info Define process to migrate existing itineraries		

Review Processes	Company A	Company B
Integration Reimbursement Travel Card program Issues/Concerns/Future state Auditing/Fraud prevention Migration risks		

Configuration	Company A	Company B
Global footprint (country to country) Policy methodology (regional, country, etc.) Groups configuration & methodology (e.g. region, business unit, country) Workflows & reimbursement cycle times Receipt handling approach Permissions audits		

Imports & Extracts	Company A	Company B
Travel Employee/Unique login Single lists Connected lists Validation table Card Cost object approval workflow Authorized approver workflow Standard accounting extract Custom extracts Attendee		

Integration	Company A	Company B
Financial systems HRIS Partners		

Credit Card	Company A	Company B
Corporate card Purchasing card Lodge/Diversion card		

Contracts	Company A	Company B
Transaction & tier cost Contract terms Legacy data - Data dump Legacy data - Historical data service Legacy data - Access permissions		

Training

Company A

Company B

End user training
Back office training
Change management

Reporting

Company A

Company B

Build custom reports
Migrate reports



To learn more best practices for how you can prepare your T&E system during M&A, **contact your SAP Concur Representative.**

**This checklist does not represent or replace professional advice surrounding mergers and acquisitions. Always consult legal counsel or a professional regarding matters of M&A.*

THE BEST RUN



ABOUT THE LYNDON GROUP

Founded in 2000, Lyndon Group is a professional services firm specializing in travel and spend management projects. We provide a host of tailored services to help organizations of all sizes, and in any industry, with all aspects of their Travel and Spend Management program. As a SAP Concur Solution Provider, Customer Success Partner and Certified Implementation Partner, our reputation has been built on successfully implementing and optimizing SAP Concur solutions so that each of our clients mitigate risk and drastically increase their productivity, reduce costs, and achieve a quicker and greater return on their SAP Concur investment than what they could achieve on their own. SAP Concur is a key part of the solution – we bring the entire solution to your project. The Travel, Expense and Invoice related services we provide are considerably different than any other professional services company. We deliver “full life-cycle” assistance and work with you to take full advantage of SAP Concur’s built-in controls and make processes more efficient and user friendly. We help ensure our clients’ programs make a positive business impact and by reviewing and analyzing current travel and spend management programs, we adeptly balance a focus on both cost-reducing and traveler-focused policies and procedures; in some cases, we can provide high impact cost savings recommendations while also maintaining that balance. For more info contact: info@lyndon-group.com

ABOUT SAP

SAP Concur is the world’s leading provider of integrated travel, expense, and invoice management solutions, driven by a relentless pursuit to simplify and automate these everyday processes. With SAP Concur, a top-rated app guides employees through every trip, charges are effortlessly populated into expense reports, and invoice approvals are automated. By integrating near real-time data and using AI to audit 100% of transactions, businesses can see exactly what they’re spending without worrying about blind spots in the budget. SAP Concur eliminates yesterday’s tedious tasks, makes today’s work easier, and helps businesses run at their best every day. Learn more at concur.com or the [SAP Concur blog](https://blogs.sap.com).

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