

USER GROUP SESSION SUMMARY

Critical Essentials for Mergers & Acquisitions with UKG Pro & WFM

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OVERVIEW:

This User Group session focused on setting the stage for successful M&A activity with UKG Pro and WFM. Our presenters, Sability's Christine Richards and Amanda Fernandez, shared the foundation for M&A work, best practices for gathering requirements, the importance of a gap analysis, and the tools and project planning to keep M&A transactions on track.

SUMMARY:

Merger and acquisition work varies in complexity and approach, but it is most effective to treat every engagement as a mini-launch. As new employees, organizational structures, payroll, and HR configurations are being integrated, organizations need a full cycle of analysis, review, testing, and validation to ensure a smooth transition. Success depends on early, well-timed coordination with UKG and alignment between the organization's team and the support services team. An aligned transition team helps identify discrepancies and downstream impacts to the UKG Pro and UKG Pro WFM products, Payment Services, Change Management, and supplemental products.

UNDERSTANDING GAP ANALYSES:

A gap analysis identifies differences between the current state and desired future state of the combined organization. An effective gap analysis will:

- Proactively identify issues before they impact employees, payroll, compliance, or integrations
- Reduce work and unexpected interruptions
- Position the merged entity for long-term success

PRESENTERS



**CHRISTINE
RICHARDS**

Sability Director,
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**AMANDA
FERNANDEZ**

Sability
Account Executive

**WATCH THE
SESSION RECORDING!**

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USER GROUP:

If you're interested in participating in our next User Group session, join our LinkedIn Group "[Sability UKG User Group](#)" or reach us at customersuccess@sability.com