Cape Peninsula
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THE EFFECT OF HUMAN RESOURCE INFORMATION SYSTEMS ON THE MERGER OF A SELECTED FINANCIAL INSTITUTION IN THE WESTERN CAPE

by

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DECLARATION

I, Mieshka Paulse, declare that the contents of this thesis represent my own unaided work, and that the thesis has not previously been submitted for academic examination towards any qualification. Furthermore, it represents my own opinions and not necessarily those of the Cape Peninsula University of Technology.

	1 December 2021
Signed	**Date**

ABSTRACT

Information systems and processes, particularly the Human Resource Information System, are difficult to implement and maintain during mergers and acquisitions. The changing nature of business establishes a postulation that the Human Resource Information System is not a traditional cost-driven partner, but a strategic partner. Human Resource technologies such as the Human Resource Information System are used to collect, store and report workforce data and are often described as a solution to Human Resource related problems.

This study aimed to answer the following questions:

i)   RQ1: What are the reasons for ineffective Human Resource Information System implementation in organisations during mergers and acquisitions?

ii) RQ2: How can the Human Resource Information System be utilised to achieve organisational success during merger and acquisition?

The aim of the study was to explore the reasons for Human Resource Information System integration failure before and after merger and acquisitions. The study was inductive. Data were collected through interviews. An interview guide with semi-structured interview questions was used. Non-random, conveniently selected participants in the Human Resource (10) and Information Technology (5) department at senior, middle and lower-level positions who utilised the Human Resource Information System on a regular basis were interviewed. The data were analysed using summarising, categorising and thematic analysis.

The contribution of the study is proposed guidelines for insurance organisations to assist with the integration and maintenance of the Human Resource Information System during and after mergers and acquisitions for the newly-formed organisation to gain the benefits of using the system. The research found that where integration fails, a large proportion of this failure is due to the lack of integration. In addition to the integration challenges, the study identified many factors that need to be considered when successfully integrating an Human Resource Information System during a merger and acquisition, with business process management, change management, communication, culture, human resources, information management, product development and business-IT alignment being the main factors.

The study adhered to strong ethics to ensure that the integrity and moral principles were followed throughout as required by Cape Peninsula University of Technology. Consent was obtained in writing from the companies as well as the research participants.

Keywords: Human Resource Management System, mergers and acquisitions, information systems, information technology

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ABBREVIATIONS AND ACRONYMS

API	Application Programming Interface
BPM	Business Process Management
HR	Human Resources
HRIS	Human Resource Information System
HRM	Human Resource Management
ICT	Information and Communications Technology
IS	Information Systems
IT	Information Technology
MIS	Management Information System
M&A	Mergers and Acquisitions

CHAPTER 1: INTRODUCTION
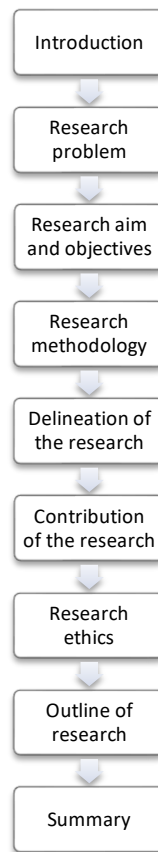
Figure 1.1: Layout of Chapter 1

1.1 Introduction

One of the major economic activities affecting many organisations is the mergers and acquisitions (M&A) process. This can be a one-time activity but still cause major organisational issues. M&A is seen as a source of opportunities but can be challenging and problematic to implement. One challenge is the difficulty to implement and integrate information systems (IS) during M&A. Businesses have become pervasively dependent on IS (Menant et al., 2021; Henningsson et al., 2018). These IS are Information Technology (IT) based systems and have a significant impact on the operations of the organisation (Hanelt et al., 2021; Memon et al., 2018). One of the main IS impacted by M&A is the Human Resource Information System (HRIS).

An HRIS is a system that establishes the connection of Human Resources (HR) with IT. As technology advances, meaningful information is becoming more critical (Pieris & Preena, 2020; Masa'deh et al., 2019). The HRIS is a tool that enables standardisation in the gathering of employee information. In this context, an emerging issue for both IS and HR is the effective implementation of an HRIS. IS and HR play a critical role in the

realisation of value during M&A. Mergers and acquisitions are increasing worldwide and have become progressively dependent on Information and Communications Technology (ICT).

This research has been performed on two financial organisations in the insurance industry. The M&A of these organisations took place in December 2010. During and after the M&A, many challenges hampered the integration of the two organisations' HRISs. The aim of this research was to explore the reasons for HRIS integration challenges during and after the M&A.

This chapter covers: i) an introduction of the study; ii) background to the problem statement; iii) problem statement; iii) research aim; iv) objectives; v) research problem; vi) research questions; vii) research methodology; viii) ethics; ix) delineation of the research; x) contribution; xi) summary; and xii) layout of the thesis.

1.2   Background to problem statement

M&A is one of the riskiest strategies for growth in terms of failure and development. The integration and implementation of an HRIS are challenging during M&A (Al-Hawari & Bandyopadhyay, 2021; Fansi & Nkwantchoa, 2020; Bauer et al., 2018; Brueller et al., 2018; Henningsson et al., 2018). In general, it is believed that M&A can create a synergetic effect, thus enhancing an organisation's overall value. However, the completion of M&A often marks the beginning of integration issues (Bauer et al., 2018). M&A requires, among others, the integration of IS. IS integration is often a major factor that determines the success or failure of the M&A process (Henningsson et al., 2018). The HRIS is a strategic planning tool and it is critical that this tool is successfully implemented and maintained during M&A (Henningsson et al., 2018). Integrating the policies, processes and data into the existing HRIS system is often one of the most difficult stages in the M&A process and as a result, often requires extensive planning efforts and resource dedication (Brueller et al., 2018).

The management of people is a primary key to organisational success. Research suggests that M&A is one of the ways to survive in the competitive field and achieve long-term benefits; therefore, many organisations follow the M&A strategy (Bouranta et al., 2019; Thomas et al., 2019). The significant potential of new technologies in satisfying the needs of Human Resource Management (HRM) functions has enabled the development and implementation of the HRIS. HRIS implementation involves databases, computer applications, hardware and software that are used to store, manage, record, deliver and manipulate data for various functions of HR interests. Some advantages in using HRISs are that organisations can be faster in processing information, the information can be processed more accurately, improve planning, and enhance communication with employees (Asfahani, 2021; Suharti & Sulistyo, 2018).

The ability to integrate IS and related management processes during M&A is important for continuing overall business operations without causing major delays or disruptions (Ouyang & Szewczyk, 2018; Wärnich et al., 2018). According to Soundarya et al. (2018), most studies on M&A in the financial sector focus on the analysis of market shares and net worth, among others, and this helps to assess the success of the merger. However, it is equally important to analyse whether M&A is successful in terms of HR by measuring the rate of employee turnover, performance appraisal, job satisfaction, their productivity level, and their emotional intelligence level before, during and after M&A.

HRISs have evolved over the past years at a rapid rate with the invention of new technologies. The HRIS contributes to gaining sustainable competitive advantage, thereby making HRISs one of the most critical drivers of organisational development and effectiveness. Lee et al. (2019) posit that future research can deepen the understanding of the influence of HRISs by considering HR policies or sub-dimensions separately in research models.

1.3   Problem statement

It is challenging for the newly-formed organisation to integrate and maintain the HRIS during and after M&A in order to gain the potential benefits.

1.4   Research questions

The following research questions (RQs) and research sub-questions (RSQs) have been developed to explore the effect of an HRIS on financial organisations during a merger in the Western Cape.

1.4.1   Research question 1

RQ1:   What are the reasons for ineffective HRIS implementation in organisations during M&A?

1.4.1.1 Research sub-question 1.1

RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?

1.4.1.2 Research sub-question 1.2

 RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?

1.4.2   Research question 2

RQ2:   How can the HRIS be utilised to achieve organisational success during M&A?

1.4.2.1 Research sub-question 2.1

RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?

1.4.2.2 *Research sub-question 2.2*

RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?

1.5   Aim of study

The aim of the study was to explore the reasons for HRIS integration challenges before and after M&A.

1.6   Objectives of study

The objectives of the study were formulated as follows:

i) To propose guidelines for the integration, maintenance and effective use of HRISs in the financial sector.

ii) To identify the main factors affecting the integration of HRISs during M&A in organisations within the financial sector.

iii) To determine the different strategies that organisations follow when implementing HRISs during M&A.

1.7   Research methodology

A detailed discussion on the research methodology followed during this study is provided in Chapter 3. In this study, subjectivism was adopted as ontology because of the nature of the research and the different frames of reference of the interviewees. A qualitative approach was adopted to attain a view of the personal experiences, current challenges, and recommendations. The case study strategy followed enabled a holistic enquiry to be undertaken in the natural setting in which the merger has occurred.

1.7.1   Research philosophy

1.7.1.1 *Research ontology*

Ontology refers to assumptions of the nature of reality. Ontological assumptions shape the way in which you see and study your research objects (Saunders et al., 2019:133). Two contrasting spectrums of ontology exist, namely foundationalist and anti-foundationalist ontology; the former implies the existence of a real world independent of our knowledge and the latter a socially and discursively constructed reality (Poetschke, 2003). This study followed an anti-foundationalist, subjectivist ontology considering the exploratory nature of the research required.

1.7.1.2 *Research epistemology*

Epistemology refers to i) assumptions about knowledge, ii) what constitutes acceptable, valid and legitimate knowledge, and iii) how we can communicate knowledge to others (Burrell & Morgan, 2017). Epistemology has two main stances: i) positivism and ii) interpretivism. This

study followed the interpretivist approach as the aim of the research was to explore the reasons for HRIS integration challenges before and after M&A by means of the interpretation of social worlds and contexts.

1.7.2 Research approach

This study adopted an inductive approach that involved the search for a pattern from observation, and questionnaires to contribute towards the development of theories. This approach was followed because of the interpretive paradigm chosen, where a case study was used to contribute to knowledge of individual, group, organisational, social, political and related phenomena (Yin, 2009).

1.7.3 Research strategy

This researched used a case study as strategy (section 3.4). "A case study is a research approach in which one or a few instances of a phenomenon are studied in depth. Case studies focus on one or a few instances, phenomena, or units of analysis, but they are not restricted to one observation" (Given, 2008:68). The selection of a case study method was informed by its advantages in focusing on examining social and cultural influences.

1.7.3.1 Unit of analysis

The unit of analysis comprised two financial institutions that merged into one organisation. The organisations have comparable units because both organisations are utilising an HRIS system.

1.7.3.2 Unit of observation

The units of observation in this research were the purposively selected participants in the HR (10) and IT departments (5) (sections 3.4.1 & 4.3) of the merged entity, who are utilising the HRIS on a regular basis. Data collected for the research were gathered during interviews with managers in the HR and IT departments at senior (7), middle (4) and lower-level (4) positions. Semi-structured questionnaires using interviews were conducted on eight (8) participants in Company A and seven (7) participants in Company B (Company A and B representing the two organisations before the merger).

1.7.4 Data collection

Data were collected by means of interviews using semi-structured questions of an Interview guide (Appendix B). Fifteen (15) interviews were conducted. The interviews were recorded with the consent of the participants (Appendix A).

1.7.5 Data analysis

The recorded interviews were transcribed; the specific transcription of a participant was returned to the participant to validate and if needed, correct the transcription. Once validated,

the transcriptions were analysed. Analysis was done by coding, summarising, categorising and finally developing themes.

1.8 Ethics

Simons (2009) refers to a democratic ethics model of fairness, justice and equity. The model highlights the interrelationship between three key concepts: confidentiality, negotiation and accessibility.

The following principles were adhered to during the research:
  i) Autonomy (respect for the person).
  ii) Beneficence (benefit to the research participant; this was explained to the participants before the interview).
  iii) Non-malfeasance (absence of harm to the participants; they were made aware that they could withdraw at any time during the research process without any condition applicable to the withdrawal).
  iv) Justice (notably distributive justice—equal distribution of risk and benefits between communities).
  v) Ethical practice in relation to research colleagues.
  vi) The research treated all the respondents as anonymous (both the unit of analysis and the units of observation were coded to ensure anonymity of the companies and the participants)
  vii) Ethical practice in relation to the environment.
  viii) Ethical practice in relation to the South African society.

1.9 Delineation

This research focused on two financial institutions based in the insurance industry and geographic located is in Western Cape. The study focused on the HR and IT departments only. All other financial institutions in the Western Cape were excluded from the research due to time and financial constrains as well as some unwillingness of other organisations to participate in the research. No generalisation was attempted with the results of the study.

1.10 Contribution

This research focused on the influence HRISs have on the insurance sector by examining its functions, problems, prospects and benefits. The aim of the research was to explore the reasons for HRIS integration challenges during and after M&A.

The study has both practical and theoretical significance in that it sought to enhance the understanding around effective integration of HRISs during M&A. The study provides practical insights in terms of guidelines which may assists organisations to improve integration efforts.

The findings can be used to establish the most appropriate strategies for future integrations during M&A. The study can also be used as a source of knowledge that informs merging organisations of the reasons of ineffective integration of HRISs during M&A as well as providing guidance on how HRISs can be utilised to achieve organisational success during M&A.

1.11 Summary

Chapter one highlights the research problem, aim, RQs, RSQs and objectives of the study. The chapter further explains the rationale for undertaking the study by elaborating on its contribution and significance to the body of research. An introduction to the research methodology and an overview of how the research has been conducted, is provided.

The study followed an interpretivist, inductive approach. A case study was adopted as research strategy, based on two merging financial organisations as the unit of analysis, and 15 participants who were purposefully selected in the HR and IT departments as the units of observation. In total, 15 interviews were conducted using a semi-structured questionnaire as data collection tool. The answers to the questions were transcribed, reviewed and analysed, and key themes were identified.

The problem statement was formulated as follows: It is challenging for the newly-formed organisation to integrate and maintain the HRIS during and after M&A in order to gain the potential benefits.

The key research questions that the study sought to answer are:

RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

The aim of the research was to explore the reasons for HRIS integration challenges during and after M&A.

1.12 Chapter layout

The thesis consists of the following chapters:

Chapter 1: Introduction

The first chapter introduces the research in terms of the background, introduction and the purpose of the study.

Chapter 2: Literature Review

This chapter presents the literature review.

Chapter 3: Research Methodology

This chapter focuses on the research design and methods.

Chapter 4: Analysis and Findings

This chapter outlines the research findings and themes.

Chapter 5: Discussion

In this chapter, the themes are addressed in accordance with the research questions presented to the participants.

Chapter 6: Conclusion, recommendations and further research

Chapter 6 outlines the recommendations, limitations of the study, future research and concludes with a reflection.

Chapter 2 encompasses a literature review in which all concepts and issues related to the study are defined and/or discussed.

CHAPTER 2: LITERATURE REVIEW
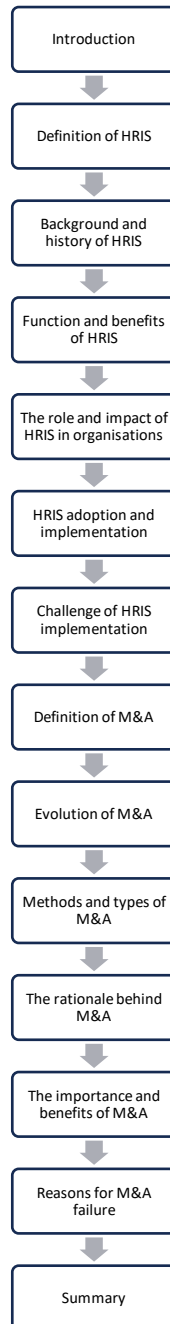
Figure 2.1: Layout of Chapter 2

2.1 Introduction

The skills and strategies needed for the M&A of businesses to successfully integrate an IT system often requires new strategies and skills. This chapter provides an overview of M&A and the various challenges when integrating an HRIS during M&A. Keywords were identified from the title, problem statement and RQs, and used as a guide to search through the literature. Additional key words were identified from the literature and an iterative process was followed.

The literature review is structured as follows: i) definitions of HRIS; ii) background and history of HRIS; iii) function and benefits of HRIS; iv) the role and impact of HRIS in organisations; v) HRIS adoption and implementation; vi) challenge of HRIS integration; vii) definition of M&A; viii) evolution of M&A; ix) methods and types of M&A; x) the rationale behind M&A; xi) the importance and benefits of M&A; and xii) reasons for M&A failure.

2.2 Human Resource Information System

In this section the following topics are discussed: i) HRIS definitions; ii) background and history of HRIS; iii) function and benefits of HRIS; iv) role and impact of HRIS in organisations; v) HRIS adoption and implementation; and vi) challenges of HRIS implementation.

2.2.1 Definitions of Human Resource Information System

HRISs have been defined by numerous authors. Broderick and Boudreau (1992:16) define HRIS as "the composite of databases, computer applications, hardware and software that are used to record, store, manage, deliver, present and manipulate data for human resources". Hendrickson (2003:381) extends this definition of HRIS by describing it as "a set of tools and techniques which consists of processes, procedures, analysis, collecting, handling, archiving, and analysing information about an organisation's employees". Bondarouk and Ruël (2009:98) define the term HRIS as "an umbrella term covering all possible integration mechanisms and contents between HRM and Information Technologies aiming at creating value within and across organisations for targeted employees and management". Obeidat (2013:72) describes an information system as "a formal method of gathering and organising data to enable administrators to make informed decisions and advance the organisation's goals". Obiedat (2013) furthermore emphasises that the information provided should be up-to-date, true, reliable, and open to administrators to aid those making critical strategic and human resource decisions.

A simplistic definition is proposed by Voermans and van Veldhoven (2007:887): "HRISs are administrative and technological aids for carrying out HR tasks". Qaisar et al. (2018:1) add that "an HRIS creates a user experience that is common across departments. Ease of use, sharing of duties, common language and makes it easier to communicate and resolve issues, collaborate, and decentralise many recurring tasks". More recently, Smith (2021:13) proposed a definition introducing the concept of HRIS as "a system for acquiring, storing, manipulating, analysing, retrieving, and distributing information about an organisation's human resources".

An HRIS is "a computerised system that assists human resource departments in managing information, performing administrative and strategic duties, and making decisions" (Menant et al., 2021:2). The HRIS also assists HR managers to perform HR functions in a more effective and systematic way and aids in efficient human resource management and planning toward

achieving organisational excellence (Mohammed, 2021; Magutu & Marika, 2018; Jain, 2014). HRM systems are considered primary tools that organisations utilise to derive specific behaviours from their employees (Lee et al., 2019). An HRIS must be able to cover all the HR management processes and the various computerised tasks to better respond to organisational needs, thereby assisting management with enhanced decision making.

All the definitions were considered, and the definition of Bondarouk and Ruël (2009:98) was chosen as the basis of this research.

2.2.2 Background and history of Human Resource Information System

In recent decades, organisations have begun to employ IS in different activities and departments because of the rising impact of globalisation and technology. HR is one of the departments that most frequently use management information systems (MISs) (Ngwenya et al., 2019; Bal et al., 2012). The responsibility of the HR department is mostly administrative. The goal of an HRIS is to decrease the manual labour associated with these administrative tasks by using tools such as IS (Lina, 2019).

Historical data reveals that the evolution of HRIS can be traced back to the 1950s and 1960s when the first automated systems were introduced. Kavanagh et al. (1990) shared insights into the historical evolution of HRIS by introducing the historical eras of HR, from the pre-World War II period to the 1990s and how the evolving HR practices had its effect on the HRIS. Despite its early start, the HR function has become one of the last management functions to be automated. This does not mean that an HRIS is not important; it indicates the complexity of developing and implementing systems in HR compared to other business functions (Chakravarthy, 2020; Bussler & Davis, 2002). Asdar (2019:2) summarises the evolution of HRIS in Figure 2.2.

Today, however, while some organisations utilise HRISs to cut costs and enhance communication, others use them to re-orient HR processes, which improves the HR function's strategic contribution (Joseph et al., 2021). Despite this growth in HRIS, research on the use of HRIS has often been fragmented and little focus was given to the field's evolution (Johnson et al., 2016). The HRM function is fast evolving, and the application of IT has revolutionised the way in which organisations operate. The mere adoption of the HRIS is seen as a way for organisations to guarantee that their HR department is more involved in the day-to-day operations of the company (Nam, 2014).
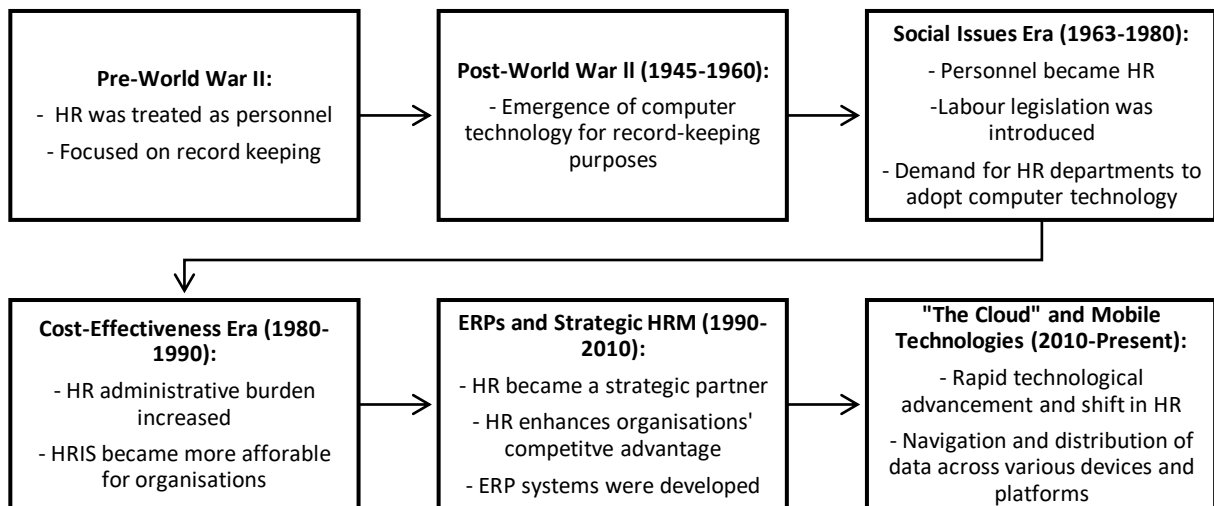
Figure 2.2: Evolution phases of HRIS (Source: Asdar, 2019:2)

2.2.3 Function and benefits of Human Resource Information System

An HRIS, as any other sophisticated organisational IS, contains not only the computer hardware and software applications that make up the technical portion of the system, but also the people, policies, procedures, and data needed to administer the HR function (Hendrickson, 2003). The HRIS is an integral part of any organisation. It is used for the management of employee records and documentation. It includes a suite of modules that support the various roles of HR management and other functions. These modules provide a variety of capabilities that allow individuals to perform HR tasks more easily.

The inevitability and applicability of HRISs are so widespread that most businesses, regardless of size, industry, age, ownership or geographic location, attempt to adopt and maximise its benefits (Tursunbayeva et al., 2019). There are many benefits resulting from the implementation of an HRIS. The most common benefits emerging from the literature are summarised in Figure 2.3 (El Idrissi et al., 2021; Begum et al., 2020; Tursunbayeva et al., 2020; Lina, 2019).

These advantages contribute to more simplified and effective organisational procedures as well as increased organisational profitability. An enterprise-wide HRIS not only makes the HR function more effective but also serves individual employees by enabling them to become self-sufficient (Waheed et al., 2020; Iqbal et al., 2019; Tursunbayeva et al., 2019; Parry & Tyson, 2011).
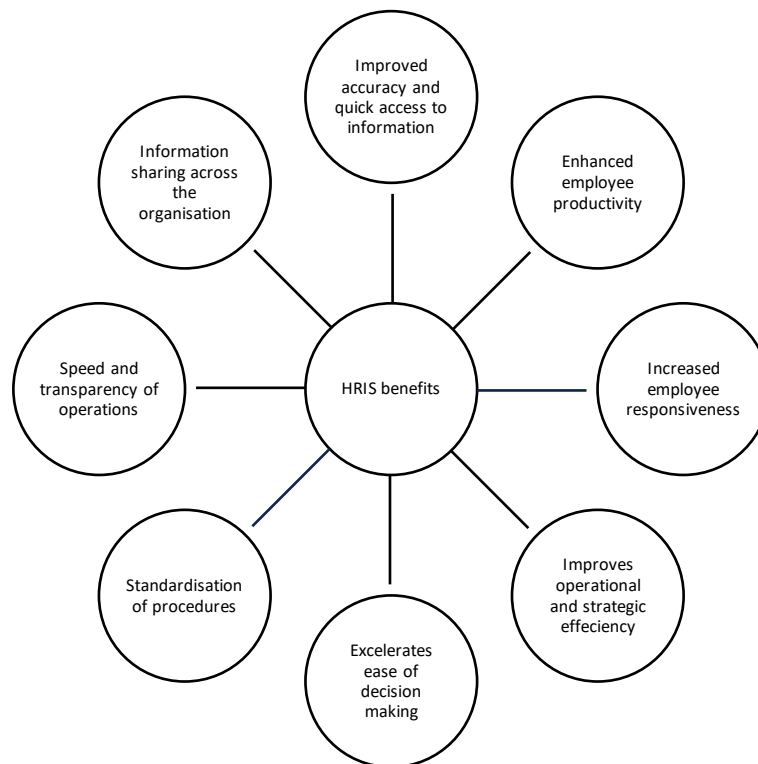
Figure 2.3: Benefits of HRIS (Source: Researcher)

2.2.4 The role and impact of Human Resource Information System in organisations

The degree to which and how a company uses its human capital determines its optimal efficacy and efficiency (Maamari & Osta, 2021; Hosain, 2017). To survive during this competitive period, businesses must assist their employees in adapting and evolving to the greatest extent feasible. To do so, businesses first need to determine how well their employees are functioning by using technology such as the HRIS (Mahadik & Ayarekar, 2020; Hosain, 2017). Organisations are now becoming increasingly reliant on the HRIS to enhance the value of HR. The HRIS is viewed as a critical component of all operational and strategic functions in all businesses. An increasing number of organisations are creating information technology that may assist them in achieving their objectives in a timely way, resulting in organisations making more effective strategic decisions because of their use of ISs (Arefin & Hosain, 2019).

2.2.5 Human Resource Information System adoption and implementation

HRISs can be built in-house by utilising existing IT resources such as programming and system design, especially in larger companies or IT-oriented businesses. However, these requirements may be poorly implemented. Furthermore, not every organisation has the capacity to build its own HRIS, thus many companies opt to outsource the HRIS functionality (Wallo & Kock, 2018; Rao & Dhillon, 2017; Dery et al., 2013). The deployment of an HRIS must have a strategic aim linked to the organisation's overall goals and strategy. Otherwise, the HRIS system would more likely be utilised as an operational tool rather than to fulfil the organisation's strategic goals (Molete et al, 2021; Stavrou et al., 2010). The HRIS is utilised to

enhance an organisation's dynamic skills and resources, resulting in a competitive advantage. Organisational operations such as recruiting and personnel management may be codified and standardised using the HRIS by automating recurring procedures and preserving records, processes and workflows (Redelinghuys, 2021; Markova, 2012). While HRISs may assist businesses in achieving their strategic objectives, the mere adoption of an HRIS without integration into the organisation's current strategic framework and procedures cannot provide this advantage. This growth in the use of new technologies in the HR functions of various organisations is a great example of their relevance and holds many advantages for HR (Duangekanong, 2020; Saleh, 2016).

The acceptance and scope of an HRIS are influenced by three factors: i) the department's relative advantage; ii) HRIS interoperability with other organisational systems; and iii) HRIS complexity (Kamble, 2018; Teo et al., 2007). According to Troshani et al. (2011), the adoption of an HRIS depends on three factors: i) technological; ii) organisational; and iii) environmental factors. Integration, accessibility, and operational efficiency are the primary benefits and catalysts for HRIS adoption on a technological level. These advantages may outweigh HRIS complexity and implementation expenses. An HRIS must provide user-friendly functionality and organisational fit to the organisation's business operations to mitigate these risks. Management commitment, human capabilities, and the size of the company all have a beneficial influence on HRIS adoption at organisational level. Variables connected to the environment that favourably affect HRIS adoption include regulatory compliance and successful implementation.

Management must promote a culture of technological user-friendliness within the organisation, make staff aware of the goals and benefits, and involve them in the project's design, implementation, and improvement to ensure end-user commitment and involvement (Khouya & Benabdelhadi, 2020; Kamble, 2018). Employees should be given appropriate training and technical support in the event of issues (Manivannan & Valliammal, 2021; Kamble, 2018). HRIS adoption is influenced by the size of the organisation, management commitment, human and financial resources, degree of centralisation, and orientation of the HR function. Organisational size has been identified by several authors as a key determinant of adoption and use (Iqbal et al., 2019; Troshani et al., 2011; Parry & Tyson, 2011; Strohmeier & Kabst, 2009; Teo et al., 2007; Ngai & Wat, 2004). The advantages of an HRIS are spread over a large number of users, allowing the organisation to realise economies of scale (Troshani et al., 2011). The larger the company, the more cost-effective it will be (Khouya & Benabdelhadi, 2020; Waheed et al., 2020; Parry & Tyson, 2011).

The dedication and support of leadership is also a significant component in the adoption and utilisation of an HRIS (Manivannan & Valliammal, 2021). Leadership that understands the

benefits and advantages of an HRIS will offer the support and resources needed for the HRIS to be successfully implemented (Teo et al., 2007). The HR function's strategic direction as well as industry has an influence on adoption (Manivannan & Valliammal, 2021; Waheed et al., 2020). However, centralisation inside the company has a detrimental influence on HRIS user acceptance and participation. Employees may believe that they are not participating in the project and that it is being pushed on them by leadership (Troshani et al., 2011). The value of an HRIS is determined by the benefits it may bring to HRM and how the technology is used by different types of users (Davarpanah & Mohamed, 2020; Bondarouk et al., 2017). Armstrong and Taylor (2020:875) provide the ten steps required to successfully implement an information system as shown in Figure 2.4.
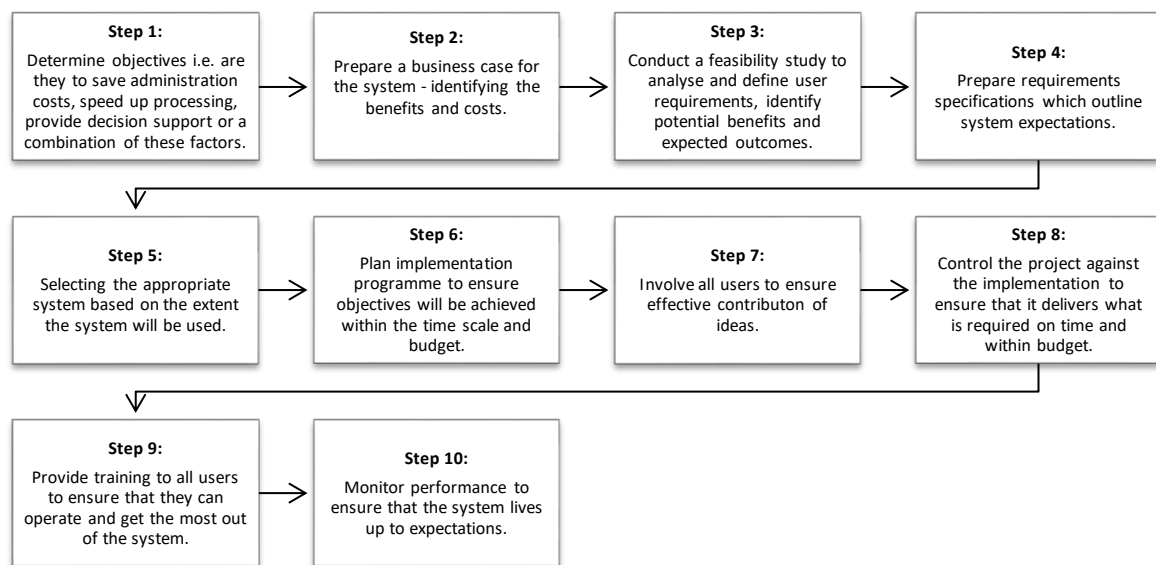
Figure 2.4: Ten steps to develop and implement an information system (Source: Armstrong & Taylor, 2020:875)

Implementing an HRIS does not guarantee that the organisation would obtain immediate strategic benefits, and it is not enough for an HR department to become strategic on its own. It does, however, assist organisations with achieving their objectives by allowing leadership to dedicate more time to strategic and value-creating activities by changing their duties and responsibilities from an administrative activity to a strategic and value-creating activity (Bondarouk et al., 2017). The adoption of HRISs enables organisations to achieve significant operational, relational and transformational benefits. However, the realisation of these gains is closely linked to the way in which this innovation is introduced within the organisation (Waheed et al., 2020; Galanaki et al., 2019).

2.2.6 Challenge of Human Resource Information System implementation

One of the major obstacles in the use of an HRIS is its implementation. Organisations are confronted with the following challenges when implementing an HRIS (Amaoako et al., 2022;

Jayadeva et al., 2022; Lutfi, 2022; Mansour et al., 2022; Sharma et al., 2022; Srivastava & Bajaj, 2022; Tamrakar & Shrestha, 2022; Will & Vance, 2022;Al-Hawari & Bandyopadhyay, 2021; Alhalboosi et al., 2021; Kiwango & Omar, 2021; Maamari & Osta, 2021;Lippert & Michael, 2005):

i) **Inability to re-engineer the business process:** This entails a thorough redesign of core business processes in order to achieve substantial increases in productivity and quality. Organisations utilise business process re-engineering to rethink existing processes in order to provide greater value to the end-user (Will & Vance, 2022; Lippert & Michael, 2005).

ii) **Lack of training for employees to adopt the new system:** The way users are exposed to new systems and learn how to use them may be their primary interaction with the program, therefore training remains crucial to effective implementations. The objective should be to deliver training that interests users, inspires them to embrace change, and promotes development (Lutfi, 2022).

iii) **Insufficient integration with other systems:** Integration with other systems aids in the development of more intelligent procedures, efficient communication across departments, the development of collaborative strategies, and enhanced overall results. A lack of integration may result in incorrect information and, as a result, poor decision-making. When systems are not connected, information supplied may be inconsistent, partial, or incorrect, and data manipulation may occur (Tamrakar & Shrestha, 2022).

iv) **System Inflexibility:** Systems that are unable to interact with one another results in information silos that make it extremely difficult to achieve an accurate view of how the organisation is operating. It fosters inefficiencies that impede decision-making and raise redundancy throughout the organisation (Mansour et al., 2022).

v) **Lack of user-friendly interface:** When adopting new technologies, organisations often neglect or fail to take employee satisfaction into account. Employee satisfaction can be significantly impacted by their interactions with the system. To do their job, employees spend a significant amount of time utilising technology, such as software and online services. These systems may be simple to learn, effective, and useful in completing activities, or it may be difficult to use, ineffective, and difficult to complete tasks. The usefulness and user experience of a system may be significantly impacted by the quality of the user interface (Al-Hawari, & Bandyopadhyay, 2021).

vi) **Understanding the user requirements:** The performance of systems is significantly impacted by poor user requirements. User requirements serve as the "blueprints" for organisations during system implementation. Lack of requirements can result in ineffective designs and tests, which in turn can delay system development and testing. Testing cannot be successfully conducted if the user requirements are inaccurate or

ambiguous, which will eventually result in an inferior system (Jayadeva, Shikhare, & Verma, 2022).

vii) **Prices:** Price is a significant consideration for many organisations when implementing a new system or software solution. Organisations need to ensure that the advantages of utilizing a novel solution exceed the associated expenses. The size of the organization and the number of employees often influence an HRIS's price. For bigger organizations, monthly rates may range from a few dollars to several thousand per year (Sharma et al., 2022).

viii) **Employee behaviour:** Employees, unlike business processes, infrastructure, and technology, have feelings and views regarding each change process that an organisation undertakes. Some organisations transition procedures cause employees to feel unsettled and anxious such as implementing a new system. Thus, the success or failure of a change process is inextricably linked to employee reactions to the changes, since employees are expected to embrace and implement the change process (Srivastava, & Bajaj, 2022).

ix) **Leadership:** Leadership has repeatedly been identified as one of the most critical aspects influencing the effectiveness of system implementations. Leaders may have a significant effect on the potential to create change and innovation, either favourably or adversely (Amoako et al., 2022).

x) **Planning:** Poor planning is a root cause of issues that delay project completion, result in project failure, raise expenses, have a negative impact on user acceptance, lower user morale, and may expose an organisation to additional unanticipated risks (Kiwango & Omar, 2021).

xi) **Change management:** Processes, systems, strategies, tactics, and technologies that will aid in the implementation of changes are included in change management, along with behavioural and attitudinal adjustments (such as persuading, comforting, and communicating, detecting and resolving emotional reactions, influencing, and motivating) that will enable the changes to be effective. The difficulty is in implementing and controlling engineered change in a planned, targeted manner and within a predetermined timeline (Maamari, & Osta, 2021).

Numerous reasons contribute to HRIS failure. More and more failures in the deployment of an HRIS have less to do with technology and more to do with the ability of change leaders, community concerns and organisations involved in change (Srivastava et al., 2021).

2.3   Merger and acquisition

While the case study focused on a South African insurance services organisation, the goal was to highlight the integration problems that arise when organisations join—regardless of the industry or location. The following topics are discussed next: i) definitions of M&A; ii) evolution

of M&A; iii) methods and types of M&A; iv) rationale behind M&A; v) the importance and benefits of M&A; and vi) reasons for M&A failure.

2.3.1 Definitions of merger and acquisition

M&A is a common managerial strategy, whether used by organisations to enter new markets, subdue a rival, or acquire valued resources such as technology, locations or people (Bindabel, 2020; Calipha et al., 2010:2). M&A is an amalgamation of two or more organisations (Dao & Bauer, 2021). In a merger, two companies come together and create a new entity with different values and cultures which forces them into one cohesive unit (Kansal & Chandani, 2014:209; Schuler & Jackson, 2001:240).

According to Gupta (2010:110), a merger may happen in any of the following ways: Two companies, A and B, decide to merge: i) A Company merges into B company; the combined merged company emerges as B Ltd; ii) B Company merges into A Company; the combined merged company emerges as A Ltd; iii) Company A and B both merge to form a new Company C; the combined merged company emerges as C Ltd.

Major forces that stimulate M&A and restructure activities comprise changes in technology, communication, transportation, market scope, form and intensity of competition, regulations, and economic and financial environment (DePamphilis, 2019; Mohan, 2015). M&A is the start of a new reality and not simply an event. Those involved are required to shift their behaviour, values and actions to align to a new norm, which is not likely to be reached immediately (Asiri & Hameed, 2020; Dooley & Zimmerman, 2003).

M&A is also frequently viewed as part of a company's drive for value creation and shareholder value maximisation, including efficient expansion, asset redeployment, and increased market power. M&A may serve as the most effective potent tool to build a strong foundation for productive corporate growth and the long-term survival of a firm (Bindabel, 2020; Hongjiu et al., 2019). M&A has been used as an aggressive expansion strategy across all sectors; the recent surge in M&A has provided organisations with more room to seek integration for their growth, market coverage or any other strategic need (Nandal & Nandal, 2020).

Daniel's (2021:215) definition of M&A was adopted as the basis for the research: "Combinations, deals, or transactions which are tools companies use to improve organisational performance and increase competitive advantage by maximising synergy and efficiencies. These deals are designed to achieve rapid growth, expand market share, improve brand strength, diversity risk or achieve competitive advantage through innovation among other goals".

2.3.2 Evolution of merger and acquisition

M&A has a lengthy history, possibly as ancient as commerce itself, and it is impossible to pinpoint the exact date of the first merger or purchase of firms in history. However, since the late 1800s, there have been a few 'waves' of M&A that can be identified.

The waves of M&A generated substantial changes in the structure of global capitalism, creating a shift from a business environment comprised of agglomerations of small and medium-sized organisations to the current shape, with multinational corporations dominating the market. The M&A market is characterised by peaks of high activity, followed by a decline, which is called merger waves (Andreevic, 2021).

The evolution of M&A is broken down into six stages or waves as presented in Table 2.3 (Andreevic, 2021; Jalandhar & Patra, 2020; Jo, 2019; Sarala et al., 2019; Meglio & Risberg, 2010).

Table 2.1: The evolution of M&A (Adapted from Andreevic, 2021; Jalandhar & Patra, 2020; Jo, 2019; Sarala, et al., 2019; Meglio & Risberg, 2010)

Period	Premise
Wave 1: 1897-1904	United States (US) companies tried to create monopolies in their industries as a form of horizontal integration called "trusts". This led to the creation of the Sherman Antitrust Law of 1980. Most mergers failed because of the slowing US economy, followed by the stock market collapse.
Wave 2: 1919-1929	This wave occurred after the First World War, during a period when the global economy was beginning to recover. The second wave comprised the creation of vertical integration between different organisations. The main reason for this wave was because of the large availability of capital for investment in the US. The second wave came to an end due to the crash of the US stock market in 1929, which resulted in the "Great Depression".
Wave 3: 1955-1969	The third wave has been characterised by diversification among companies caused by an economic boom. This wave of M&A became known as the Conglomerate Merger Period. One reason for the diversification trend was the antitrust atmosphere that arose in the US. The third wave came to an end in 1969 because of the US government's efforts to break up conglomerates and prohibit additional mergers and acquisitions that were deemed anti-competitive. Furthermore, the financial performance of the conglomerates created during this period was terrible.
Wave 4: 1981-1989	The fourth wave was characterised by a high number of hostile takeovers, which became a popular method of expanding businesses through acquisitions. The reaction of the target company's Board of Directors determines whether an acquisition is hostile or amicable. If the Board accepts the transaction, it is called friendly; if the board opposes it, it is deemed hostile. This wave is distinguished from the preceding three by the scale and importance of the target companies, which has led to it being called the "megamergers" wave. In the 1980s, several of the largest corporations in the US, such as Gulf Oil, RJR Nabisco, and Kraft were acquisition candidates. Processed foods, oil and gas, and pharmaceutical industries were the major sectors.
	The fourth wave came to an end in 1989 with the conclusion of the great economic boom of the 1980s and the start of a brief recession in 1990, which resulted in the failure of numerous mergers conducted during this time. The collapse of the speculative bond market, which financed a large portion of the acquisition, was another major reason that brought the wave of deals to a stop.

Period	Premise
Wave 5: 1992-2000	The 1990s are considered as a century of enormous economic opportunity. Markets were expanding at a tremendous rate as the globalisation process progressed. The fifth wave of M&A was the first genuinely global wave. As a result of globalisation, businesses began looking outside of their local borders for organisations with whom to combine (Sarala et al., 2019). With the bursting of the stock market bubble in 2000, the fifth wave of mergers came to an end.
Wave 6: 2001-2008	The sixth wave of M&A began when economic recovery reappeared and a flood of cash poured into the market because of the Federal Reserve's stimulus, which maintained low interest rates to encourage the economy. M&A activity grew in a market with abundant liquidity and low capital costs. As a result, the Subprime Crisis erupted in 2007, drying up credit and plunging the globe into recession, as well as putting an end to this wave of transactions.
Wave 7: 2011-onwards	The value of M&A worldwide reached 1.75 trillion dollars. Organisations started recognising that the chaotic business environment is the 'new normal'. In this climate, relying solely on organic growth and cost cutting to achieve consistent financial outcomes may not be viable.

2.3.3 Processes and types of merger and acquisition

M&A is often executed with the intent to gain new opportunities. M&A deals are complex and unique. They are difficult to model, yet in many cases, comparable processes and behaviours recur in a predictable order. Arminen (2020:14) presents a simplified M&A process as illustrated in Figure 2.5.
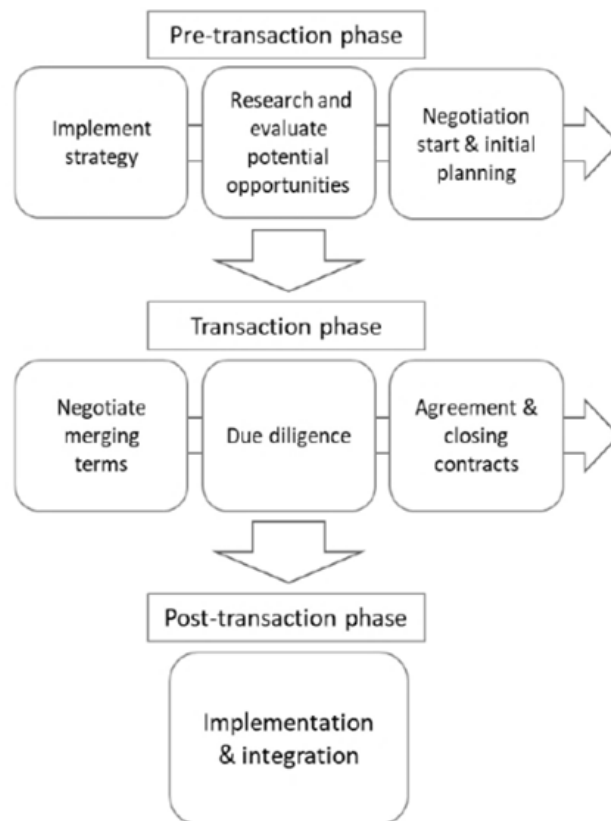
Figure 2.5: Process of M&A (Source: Arminen, 2020:14)

i) **Pre-transactional phase:** At this point, potential targets or merging partners are contacted and preliminary negotiations are initiated (Bösecke, 2009).

ii) **Transactional phase:** The transactional phase of the M&A process is undoubtedly the most important. This phase encompasses all the complicated elements that occur between the commencement of talks and the unification of operations (Arminen, 2020).

iii) **Post-transactional phase:** This phase implements the merger or acquisition by integrating the operations through following the strategic plan created in earlier phases. After closing the transaction, companies must join the planned activities in the defined product or market areas to create the value and synergies intended (Arminen, 2020).

According to Gaughan (2007:13), there are six types of mergers, namely: i) horizontal mergers; ii) vertical mergers; iii) conglomerates; iv) product extension; vi) market extension; and vii) reverse mergers. Each type is discussed next:

i) **Horizontal mergers:** Due to the elimination of competition between the merging parties, horizontal mergers result in at least a marginal rise in the merged company's power in the relevant market (Stöhr & Budzinski, 2020). Horizontal mergers entail organisations in the same industry merging to become a single entity (Pignataro, 2015). Horizontal M&A is common in businesses with high competition, because the most common motive is to gain a competitive edge through economies of scale by integrating resources and processes (Arminen, 2020). An example of horizontal activity is the oil industry, which has a narrow range of products while still having many large organisations competing against each other (Grant & Osanloo, 2014).

ii) **Vertical mergers:** Vertical mergers take place between companies that have a buyer-seller relationship (Gaughan, 2007). Vertical mergers are transactions which bring together companies that operate at different levels of a value chain. A common example of vertical integration is the merging of an end-product producer with its supplier or logistics partner. The goal of vertical expansion is to have more control over the entire value chain and become more self-sufficient (Lafontaine & Slade, 2021; Bösecke, 2009).

iii) **Conglomerate mergers:** The merging organisations' products do not compete in the same market or do not have an input-output relationship (Herrera-Velasquez, 2020). Conglomerate mergers refer to the amalgamation of organisations that are not connected to one another. These mergers occur between organisations that practice separate operations or operate in various markets and industries, whereas vertical and horizontal mergers share the same value chain or compete with similar items in the same market (Ross et al., 2013).

iv) **Product extension mergers:** Product extension mergers occur when two companies dealing with related items in the same market space join forces (DePamphilis, 2019). The purpose is to broaden their product portfolio with new products that another company is already able to produce, which can be cost- and resource efficient alternatives to building new production lines from scratch (Arminen, 2020).

v) **Market extension mergers:** When two or more companies sell the same products and services but operate in different markets, they form a market extension merger (Pignataro, 2015). The goal of this type of merger is to give merging companies access to a larger market share and client base. Organisations that manufacture similar products but do not compete in the same markets or geographic areas are typically involved in market extension mergers. Another essential goal is to establish greater worldwide market dominance (Zhang, 2020; DePamphilis, 2019).

vi) **Reverse mergers:** Reverse mergers entail a private business purchasing a publicly traded company and transferring its management to that entity. This permits a private firm to become public without going through the regulatory and financial formalities (Naumovska et al., 2021)

2.3.4 The rationale behind merger and acquisition

M&A is driven by the desire to create new value and possibilities for the organisations involved. Motives might differ dramatically across situations and businesses, based on their size, technical resources, corporate cost structure and strategic objectives (Zámborský et al., 2021). Some researchers argue that the motivations for mergers include, but are not limited to: i) strategic goals; ii) financial viability M&A; iii) cost reduction; and iv) reduced capital requirements (Jurich & Walker, 2021; Aevoae et al., 2020; Shyama, 2020; Ross et al., 2013).

i) **Strategic goals:** M&A may make be detrimental to an organisation if they are not well-planned, do not communicate, lack business-IT alignment, and are not subjected to adequate due diligence (Kristiana et al., 2021; Miriko & Muthoni, 2020). Due to the demands and challenges of the competitive market environment, the goal of every merger should be more than just a merging of two or more companies, but rather the accomplishment of the company's strategic goals (Rahman et al., 2021).

ii) **Financial viability:** Combined organisations might create more income than the companies alone. Strategic benefits, market or monopolistic power, and marketing gains are three common reasons provided by Ross et al. (2013).

iii) **Cost Reduction:** Successfully merged businesses appear to be more cost-effective than independent businesses and as a result of the merger, an organisation may gain operational efficiency. Pooling resources such as operational structure, organisational

facilities and systems organisations will reduce overheads and increase efficiency (Aevoae et al., 2020). Ross et al. (2013) mention five ways to achieve cost reductions, namely: economies of scale, economies of vertical integration, technology transfer, complementary resources, and elimination of inefficient management (Shyama, 2020).

iv) **Reduced capital requirements:** Unnecessary duplications such as personnel, processes, systems, or identically operating headquarters are sometimes discovered when organisations merge. These redundancies might be sold or rented to reduce the organisation's working and fixed capital requirements and allow for reduced capital requirements (Chen, 2019).

2.3.5 The importance and benefits of merger and acquisition

M&A has shown to be a powerful tool for achieving business profitability, diversity and growth (Osuma et al., 2021). The quality of organisational transformations and implementation effectiveness will determine the financial success of M&A. The advantages of M&A vary from one organisation to the next. Several researchers have identified multiple benefits of M&A, for example, rapid access to new technology, possibilities to develop products and services, a larger client base, a stronger financial situation, and a stronger market position are just a few of them (Kristiana et al., 2021).

Successful mergers may harness the strengths and advantages of merging organisations by efficiently integrating and aligning business processes and creating synergies (Riad & Daellenbach, 2019; Gottschalk et al., 2008). Synergy is described as the combined value or performance of two or more entities, which is greater than their individual performance. This occurs when two or more entities can generate more income, remove duplicate procedures and expenses, or generate higher profit for their stakeholders than they could alone (Čirjevskis, 2020).

Hussain et al. (2020:2419) summarise the many benefits of M&A:

i) **Organisational synergy:** The merged organisation receives greater value than the individual entity.
ii) **Reduced costs:** M&A may reduce expenditure of the combined organisation, thereby resulting in a wealth maximisation of shareholders.
iii) **Diversification of risk:** The organisation can survive in a dynamic competitive environment by having more revenue streams and allowing the organisation to spread the risk across these revenue streams.
iv) **Gaining economies of scale:** This enables capital increase, lower costs and better bargaining power.
v) **Enhance returns on equity:** Provides greater profit margins.

    vi) Reduction in taxes: A prosperous business can purchase a lossmaker to benefit from the target's loss by lowering their tax obligations.

    vii) Cross selling: Allows the merged organisation to market additional products to existing customers.

    viii) Market share: If the buyer absorbs a major competitor, the market power will increase.

2.3.6 Reasons for merger and acquisition failure

M&A has become an increasingly broad-based phenomenon, and the numbers are growing dramatically in the United States, Europe, and throughout the globe. Still, research shows that between 70% and 90% of M&A fail (Joshi et al., 2020). M&A success can be difficult to assess, and the hoped-for advantages may take years to manifest. M&A comprises complicated and multifaceted operations; they frequently result in unintended consequences. Even when some goals are met and value is generated, it is typical for other elements to suffer because of the unification (Thompson & Kim, 2020; Fiorentino & Garzella, 2015).

While M&A is intended to benefit merging organisations, the problems they represent must not be underestimated. The reasons for M&A failure are discussed below:

i) Leadership

Leadership is a crucial factor in the success of M&A. Leaders are a key factor in the reason for M&A failure because they are responsible for facilitating the restructure process, gaining the trust of both companies and promoting the overall integration process (Tella, 2020; Sapkota et al., 2019; Bodner & Capron, 2018). Henningsson et al. (2018) further adds that leadership involvement reflects employee perception of the extent to which leaders engage in the planning and execution of operations.

It is thus crucial to ensure that employees feel that the leaders have control over their daily tasks, reducing fear, doubt, or tension. During the M&A process, a change in leadership can have a significant influence on a company's culture if the transition is not seamless or if the new leadership does not lead by example (Degbey et al., 2021).

ii) Lack of effective integration of information systems

One important factor in explaining the high number of failures in corporate M&A is IS-related issues and the lack of effective integration of IS. The lack of involvement of the IS department in M&A decision making and planning, unconnected systems and processes, data redundancy, incompatibility, slow integration and lost business opportunities can all be attributed to the lack of effective integration of IS (Khan et al., 2021; Říhová, 2018) The causes of ineffective IS integration during M&A can be classified as follows (Říhová, 2018:265):

    a) Inappropriate planning

    b) Unrealistic expectation of the project

c) Ineffective use of resources

d) Miscommunication

e) Migration and consolidation of data

f) Underestimation of the time required for the integration

iii) Change management

M&A is also complex in terms of change management. Thuy and Van (2020) note that change happens in stages and as a result, one of the reasons why the expected long-term benefits of organisational transformation do not materialise is a decrease in employee engagement during periods of change and transition. Employees must be prepared for the change; they need to comprehend and embrace the rationale for the change (Hartig, 2020). Change management should thus be a process focusing on people, their resistance, their coping mechanisms and, ultimately, how they accept change in the workplace (Neves et al., 2021; Gotsill & Natchez, 2007).

iv) Business-Information Technology alignment

Another reason for M&A failure is business-IT misalignment from the pre-merger stage, as well as problems with cooperation and coordination within the newly merged organisations. Organisations increasingly depend on IT and their capabilities to efficiently integrate IT resources into other organisational processes (Castellanos, 2021; Banal-Estañol & Seldeslachts, 2011). In addition, a lack of knowledge of roles and duties in terms of strategy and implementation can make simple activities complex; therefore, business leaders must involve IT solutions to achieve a unique value in a competitive market (Njanka et al., 2021).

To achieve alignment, both business and IT need to: i) understand the long- and short-term business strategies; ii) collaborate effectively; iii) sustain a high degree of communication; iv) be aligned; and v) attain a level of mutual trust (Njanka et al., 2021; Smith, 2021; Hu & Huang, 2006).

v) Business process management

Business Process Management (BPM) is a set of tools and techniques for improving processes and a method for integrating the whole organisation. The core activities of BPM involve an understanding and definition of processes and key activities (Vom Brocke et al., 2021; Houy et al., 2011; Lin et al., 2006). Reijers (2021) posits that it is essential to understand the steps carried out as part of the business process, the people who are involved in the steps, and the technologies that are used when executing the steps. Rationalisation assists organisations in doing more with less, thus becoming efficient and putting effective measures in place (Reynolds & Hassett, 2021). Furthermore, breaking silos is important for merged organisations

to achieve synergies. Breaking silos is the concept of unifying business units that perform similar business functions when two organisations merge (LugoSantiago, 2018).

The role of process owners has been highlighted as important in companies that have effectively implemented BPM, since the process owner is accountable for the whole process across all functional divisions. The individual must have some level of power to manage the budget and make decisions about how to enhance the process in the future (Kupiainen, 2020).

Kupiainen (2020:50) identifies factors that negatively impact on the desired outcome of BPM:
   a) Integration infrastructure and bureaucracy
   b) Issues related to HR
   c) Issues related to the difficulty of receiving valuable information from the target company

vi) Communication

Communication helps reduce uncertainty, guides the business through the transition, enhances commitment to the new organisation and increases M&A success rates (Karanja et al., 2021; Risberg & Gottlieb, 2019; Allatta & Singh, 2011). Delays in communication can result in employees feeling apprehensive and even hostile toward the merger, making any subsequent communication process strained and difficult (Nguyen & Kleiner, 2003). Communication can impact on the feelings encountered by individuals during M&A, while management support can affect the happiness and anxiety of employees (Karanja et al., 2021).

Sinha and Sanchari (2014) mention the lack of communication as a major culprit in M&A, which affects both employees and clients. The authors report that only one third of merging businesses adequately communicate information to mid-to-lower levels of the organisation, which leads to confusion, uncertainty, loss of trust and has a negative impact on staff morale. According to de Leon (2021), communication must address fundamental human concerns such as what is going to happen to the employees, expectations from them as well as the benefit since employees involved in M&A are likely committed to the outcome of the merger.

vii) Culture

Managing culture usually receives low priority by executives who are overwhelmed by the operational aspects of integration (Engert et al., 2019; Marks & Mirvis, 2011). Culture incompatibility causes a lack of performance, departure of key executives, and time-consuming conflicts in the consolidation of business (Liu et al., 2021; Bijlsma-Frankema, 2001). The term *culture clash* has been used to describe the conflict of two companies' philosophies, styles, values and missions (Viskari, 2020; Bijlsma-Frankema, 2001). Cultural differences would make integration efforts difficult to implement and lower the possibility of achieving potential

synergies (Lin et al., 2006). In many large companies built through M&A, there are often subcultures based on employees' prior affiliations (Antoniou et al., 2020).

viii) Human Resources

The HR function plays an important role in organisational change by implementing specific practices that increase the favourability of employees' perceptions of, and commitment to change. Thus, it becomes imperative to involve the HR professional before the deal is finalised (Daniel, 2021; Maheshwari & Vohra, 2015). The earlier the HR function becomes involved in M&A, the greater the likelihood of successful integration of people and processes throughout the newly formed organisation (Osuma et al., 2021; Rui & Yip, 2008; Srinivasan & Mishra, 2007). HR needs to: i) anticipate the impact of the M&A integration strategy on the organisation; ii) build the organisation's change readiness and capability of its managers; iii) align structures, rules, policies, employee compensation, employee benefits, culture, pay structures, due diligence and employee designations to successfully manage the merger (Nandini, 2021; Uday-Bhaskar, 2012; Lindquist, 2007).

As far back as 2001, Schuler and Jackson claimed that M&A fails because of the neglect of HR issues and activities. Some of these issues include too little involvement of the HR function and employees, lack of due diligence and training, job satisfaction, uncertainty, loss of motivation, culture and management differences, poor motivation, turnover, performance and uncertain long-term goals (Degbey et al., 2021; Kumar & Sharma, 2019; Gomes et al., 2013; Kavanagh & Ashkanasy, 2006; Huy, 2002).

The influence of IT on business and HR operations has been explored by several scholars. According to Chakravarthy (2020), there are still various gaps prevalent in such research, particularly around understanding the impact of technology on HR operations such as recruitment and selection, training and development, performance evaluation, planning and rewards. If this gap is filled, organisations will have a better grasp of the usefulness and efficiency of HRIS technology.

ix) Human Resource Information System

While the HRIS is an essential tool for HR in terms of the potential of improved information for decision-making, Nthiga and Nyang'au (2020) note that its efficacy is dependent on the problems of its deployment and integration during M&A. Bin Jainuddin (2019:3) highlights the main factors that result in HRIS failure:

  a) **Leadership:** One of the most common causes for HRIS deployment failure is the lack of executive and management support. Organisations lack the funding, authorisation and leadership needed to build, integrate and operate the system without top management support.

b) **Planning:** The project scope must be outlined ahead of time and should include the project objectives, priorities, goals and tasks, which will serve as the team's guiding principles throughout the project's life cycle.

c) **Communication:** Lack of effective communication influences the success or failure of HRIS implementation. Communication can be an effective tool in helping to unfreeze and predispose the organisation to change.

d) **Training:** Any change management project must include training, especially when new technology and work procedures are involved. Successful organisations usually provide training during the early phases of a project to alleviate user concerns about the new technology and boost user adoption.

x) Training and development

Training and development are an important part of assessing an organisation's capability. Every well-trained employee contributes to an organisational need. Training is often referred to as systematic planning to modify or improve knowledge, work habits and attitudes with the goal of achieving successful job performance. Therefore, the integration of HRIS in training is essential (Jayabalan et al., 2020).

2.4   Summary

IS and processes, particularly HRISs, are difficult to implement and maintain during M&A. The changing nature of business establishes a novel postulation that HRIS is not a traditional cost-driven partner, but a strategic partner. HR technologies such as the HRIS which can collect, store and report workforce data are often described as a potential solution to HR-related problems. In this context, an emerging issue for both IS and HR is the effective implementation of an HRIS. These factors play a critical role in the realisation of value during M&A.

Organisations use M&A to achieve goals such as rapid growth in size, the purchase of goods and technology, and economies of scale. Despite the positive outcomes, M&A is a complicated undertaking that involves a large number of variables. M&A implies the merging of two organisations' employees, business processes and information systems into a single unit that will function harmoniously, effectively and efficiently. IS and IT are integral elements of modern business, and therefore IS integration has been highlighted as a critical factor influencing the success of an M&A transaction. M&A is on the increase worldwide and becomes increasingly dependent on ITC.

The definitions of HRIS and M&A chosen as the basis for this research are as follows:

HRIS: "An umbrella term covering all possible integration mechanisms and contents between HRM and Information Technologies aiming at creating value within and across organisations for targeted employees and management" (Bondarouk & Ruël, 2009:98).

M&A: "...combinations, deals, or transactions which are tools companies use to improve organisational performance and increase competitive advantage by maximising synergy and efficiencies. These deals are designed to achieve rapid growth, expand market share, improve brand strength, diversify risk or achieve competitive advantage through innovation among other goals" (Daniel, 2021:215).

The research questions are:

RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

In answering these questions, key concepts and definitions were discussed in this chapter. A definition of HRIS and M&A as well as critical factors that drive success and failure of IS implementation was discussed. According to the study, both the HRIS and M&As have several advantages, but if the deployment process is poor, the failure rate is significant. This is mostly due to pre- and post-merger integration difficulties, which are primarily caused by inadequate IS implementation.

The next chapter addresses the research design and methodology used to conduct this research.

CHAPTER 3: RESEARCH DESIGN AND METHODOLOGY

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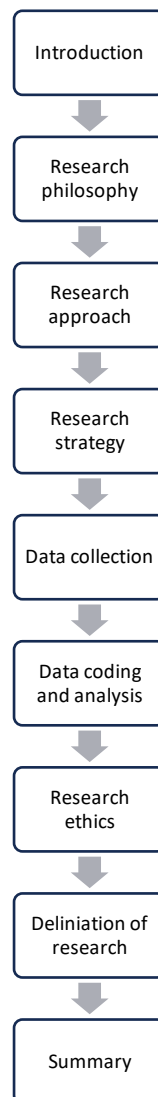
Figure 3.1: Layout of Chapter 3

3.1 Introduction

Chapter 3 elaborates on the research process followed during the study and the disciplines underpinning this research. The researcher provides insight into the chosen philosophical paradigm, research methodology, design, strategy, data collection, data analysis and ethics.

IS and processes, particularly HRISs, are difficult to implement and maintain during M&A. The changing nature of businesses establishes a novel postulation that HRIS is not a traditional cost-driven partner, but a strategic partner. HR technologies such as HRIS that can collect, store and report workforce data are often described as a potential solution to HR-related problems.

The RQs stated in Chapter 1 are:

RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

This research focused on the merger of two insurance organisations that utilise HRISs. The aim was to explore factors influencing the adoption, implementation, benefits, contribution and effective use of the HRIS. An inductive approach was followed. Data collection comprised of 15 face-to-face interviews that were transcribed and analysed. An interview guide with semi-structured interview questions was used for the data collection phase (Appendix B). Participants were selected using non-random, convenience sampling. The data analysis comprised of summarising, categorising and thematic analysis.

The research onion design of Saunders et al. (2019:130) was adopted for this research (Figure 3.2).
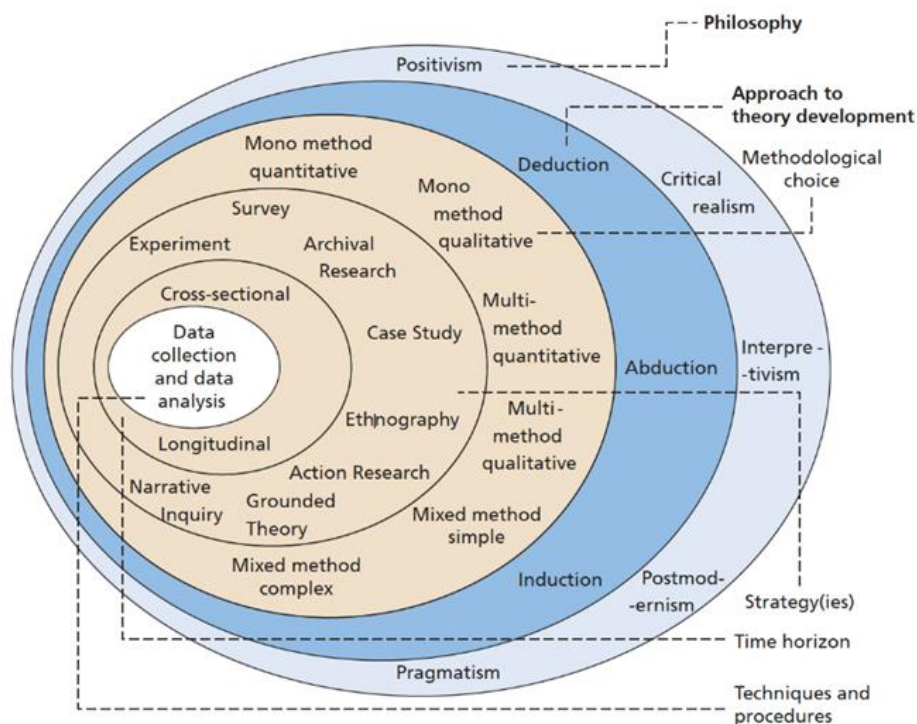
Figure 3.2: Research Onion (Source: Saunders et al., 2019:130)

3.2   Research philosophy

This research was based on subjectivist ontology, interpretivist epistemology and a case study as research strategy. Research philosophy "is a term that relates to the development of

knowledge in a particular field" (Saunders et al., 2019:159). Such a philosophy incorporates multiple realities, observable/objective data and subjective meanings, laying the foundation for adopting a study with both qualitative and quantitative elements to best answer the research question (Saunders et al., 2019).

According to Norman and Kabwe (2015:211), "a research philosophy is concerned with the nature of science that relates to the ontology, epistemology and methodology of research. The two former terms, ontology and epistemology, influence the way in which the research methodology is formulated". Greener (2011:3) identifies three philosophical approaches in conducting research, namely: i) ontology; ii) epistemology; and iii) methodology. A researcher needs to be aware of the philosophical foundations of the research problem, have an idea of what the nature of the problem is and the methodology to be used, and finally be able to demonstrate the philosophical approach to solving the problem.

3.2.1 Ontology

For this study an inherent anti-foundationalist, subjectivist ontology was adopted because of the exploratory nature of the research. Ontology is defined as "a theory of the nature of social entities" (Bryman, 2004:4). Ontological assumptions shape the way in which one sees and studies the research objects (Saunders et al., 2019). Norman and Kabwe (2015:218) consider ontology as the nature of reality that is based on either subjectivism or objectivism depending on the research approach used. Easterby-Smith et al. (2002) perceive ontology as the assumptions we make about the nature of reality. Ontology is concerned with the nature of the world—what it is made up of, what things function within it, and how they interact (Willig & Rogers, 2017). Therefore, ontology is a belief system about the nature of social reality, including what we can learn about this reality and how we can do so (Leavy, 2020).

3.2.1.1 Subjectivism

This study followed the subjectivist ontology because of the exploratory nature of the study. Subjectivism incorporates "assumptions of the arts and humanities asserting that social reality is made from the perceptions and consequent actions of people" (Saunders et al., 2019:137). Easterby-Smith et al. (2002) indicate that reality is socially produced; it is given meaning by people rather than being objective and external.

3.2.1.2 Objectivism

Objectivism is related to the views of the objectivity of the social world and the idea of causation in social processes (Bahari, 2010). Objectivists believe that social phenomena and their meanings exist independent of social actors (Bryman, 2004). Objectivism states that the researcher's "subjectivity can enable the researcher to accurately comprehend the world as it exists in itself" (Ratner, 2002:22). Saunders et al. (2019:137) also add that "objectivism

incorporates the assumptions of the natural sciences, arguing that the social reality that we research is external to us and others".

3.2.2 Epistemology

Epistemology refers to "assumptions about knowledge, what constitutes acceptable, valid and legitimate information, and how we can communicate such knowledge to others" (Creswell & Poth, 2017:16). According to Bryman (2004:4), epistemology is "a theory of knowledge and concern of what is considered as acceptable knowledge in a particular discipline". Similarly, Saunders et al. (2007:159) note that an epistemology is "a branch of philosophy that studies the nature of knowledge and what constitutes acceptable knowledge in the field of study". Therefore, epistemological assumption can be regarded as associated with the nature of knowledge and the methods through which that knowledge can be acquired.

Nicholas (2018:16) further defines epistemology as "the theory of knowledge, especially regarding its validation and the methods used. It deals with how we know things and what we can regard as acceptable knowledge in a discipline". Epistemology has two main stances, namely: i) positivism and ii) interpretivism.

3.2.2.1 Positivism

According to Saunders et al. (2019:144), "positivism relates to the philosophical stance of the natural scientist and entails working with an observable social reality to produce law-like generalisations. This emphasises the positivist focuses on strictly scientific empiricist method designed to yield pure data and facts uninfluenced by human interpretation or bias". Easterby-Smith et al. (2002) posit that knowledge is only of significance if it is based on observations of this external reality. Comparably, Nicholas (2018:21) says that "positivism is based on acceptance as fact that the world around us is real, and that we can find out about these realities".

The positivist researcher believes that there is a clear-cut relationship between things and events in the outside world and people's knowledge about them (Stainton-Rogers, 2006). The positivist researcher is also known as the 'resource' researcher (Saunders et al., 2007) because the positivist researcher attempts to explain and predict what happens in the social world by searching regularities and causal relationships between its constituent elements (Bahari, 2010).

The research did not follow a positivism approach because the exponents of positivist research utilise mainly quantitative techniques, according to Pather and Remenyi (2005). This research was interested in analysing the content and ideas raised by the respondents.

3.2.2.2 Interpretivism

Interpretivism emphasises that humans are different from physical phenomena because they create meanings. Interpretivism argues that human beings and their social worlds cannot be studied in the same way as physical phenomena, and therefore social sciences research needs to be different from natural sciences research rather than trying to emulate the latter. According to Saunders et al. (2007:148), interpretivism is an "epistemology that it is necessary for the researcher to understand differences between humans in our role as social actors". This is supported by Hennick et al. (2011), who describe interpretivism as an approach that strives to comprehend people's experiences from their own point of view. As a result, the interpretive paradigm emphasises the relevance of observation and interpretation in comprehending the social world.

The purpose of interpretivist research is "to create new, richer understandings and interpretations of social worlds and contexts" (Saunders et al., 2019:148). This study followed an interpretivist approach as the aim of the research was to explore the interpretation of social worlds and contexts.

3.2.3 Methodology

Methodology refers to the way we discover knowledge in a systematic way. A methodology is driven by the researcher's ontological and epistemological beliefs (Killam, 2013). According to Babbie and Mouton (2001) research methodology is defined as a systematic, methodological and accurate form of execution of design. Research methodology can be further described as an operational framework within which data are presented for a deeper understanding (Leedy & Ormrod, 2010).

The research methodology identifies the two major approaches that are used in research, known as qualitative and quantitative research.

3.2.3.1 Qualitative methodology

This study adopted a qualitative research approach. Qualitative research is designed to explore the human elements of a given topic, where specific methods are used to examine how individuals see and experience the world. Qualitative research involves a range of interpretive techniques that seems to describe, decode, and translate the terms that occur in a social phenomenon (Welman et al., 2006).

Creswell (2013:32) defines qualitative research as "an approach for exploring and understanding the meaning individuals or groups ascribe to a social or human problem". Leavy (2020) defines qualitative research as a method of learning about social reality, and it is generally used to investigate, describe, or explain social phenomena, as well as to unpack the meaning individuals attribute to tasks, circumstances or occurrences.

Qualitative approaches are typically used to explore new phenomena and capture individuals' thoughts, feelings or interpretations of meaning and process (Given, 2008:29). According to Leedy and Ormrod (2010), qualitative research involves looking at characteristics or qualities that cannot easily be reduced to numerical values. The methods used in qualitative research assist the researcher with obtaining insight into the social phenomenon of the investigation.

3.2.3.2 *Quantitative methodology*

Quantitative research is also known as a traditional, experimental or positivist approach (Leedy & Ormrod, 2010). A quantitative research approach counts things, analyses data statistically and quotes its results in numerical form (Gomm, 2008). The quantitative research strategy primarily tests hypotheses (Struwig & Stead, 2001). Quantitative research involves measurements of quantities of characteristics that can be used as features for a research study. Unlike qualitative research, quantitative research assumes that the world is stable and uses statistical analysis on parameter values for conclusions (Bairagi & Munot, 2020). Creswell (2013:32) defines quantitative research as "an approach for testing objective theories by examining the relationship among variables".

3.3   Research approach

According to Bahari (2010:19), when adopting an inductive approach, the researcher gathers information from participants and develops the information into themes. These themes are then developed into broad patterns, theories or generalisations. Finally, it compares personal experiences with the existing literature related to the topic. Saunders et al. (2019:17) state that "an inductive approach involves the development of a theory as a result of the observations of empirical data".

This study followed an inductive approach, which involves the search for patterns from data collected through interviews and questionnaires, to contribute towards the development of theories. This approach was followed in alignment with the interpretive paradigm chosen, where a case study was used to contribute the knowledge obtained from individual, group, organisational, social, political and related phenomena (Yin, 2009).

In contrast, a deductive approach as stated by Bryman (2004:8) is "an approach to the relationship between theory and research in which the latter is conducted with reference to hypotheses and ideas inferred from the former". A deductive approach "tests or verifies a theory by examining research questions or hypotheses derived from the theory" (Bahari, 2010:21). Therefore, a deductive approach is commonly known as testing/verifying theory.

3.4 Research strategy

This research used a case study as strategy (section 4.2). Case studies are important when the researcher needs to gain knowledge about a certain topic or scenario, and where one can identify cases rich in information (Patton, 1987). Yin (2003:12) defines a case study as "an empirical inquiry that investigates a contemporary phenomenon within a real-life context, especially when boundaries between phenomenon and context are not clearly evident".

A case study is an empirical inquiry that investigates a contemporary phenomenon within its real-life context using multiple sources of evidence. Case studies focuses on *how* and *why* things happen, thereby enabling the investigation of contextual realities and the difference between what was planned and what occurred. This strategy enables a holistic inquiry that investigates a contemporary phenomenon within its natural setting (Harling, 2012).

To understand and examine the effect of the HRIS on a merger, a case study method was chosen as the research strategy. Using an insurance services institution as a case, exploratory research was undertaken to understand the situation from various perspectives. The case study was chosen not only because of the need to uncover rich detail, but also to identify how the different findings relate and interact with each other.

Neuman (2011) supports the choice of a case study by arguing that an in-depth study is only possible with a single or a handful of cases rather than numerous cases. In addition, a case study design suited an investigation of the research problem, as it is a design that promotes the use of multiple sources of data to build or validate theories (Yin, 2009). Other factors considered were the limited resources to investigate more than one organisation. Thus, the selection of a case study method was informed by its advantages in focusing on examining social and cultural influences.

3.4.1 Unit of analysis

According to research by Grünbaum (2007:84), the unit of analysis (UOA) defines "what the case study is focusing on (what the case is), such as an individual, a group, an organisation, a city, and so forth". The unit of analysis was two insurance organisations using the HRIS to merge into one organisation. The organisations have comparable units because both organisations are utilising an HRIS.

3.4.2 Unit of observation

The unit of observation (UOO) comprised of the purposively selected participants in the HR (10) and IT departments (5) (section 4.3) who are utilising the HRIS on a regular basis. Data collected for the research were gathered during interviews held with managers in the HR and IT departments at senior, middle and lower-level positions. Semi-structured questionnaires and

interviews were conducted with eight (8) participants in Company A seven (7) participants in Company B.

3.4.3 Sampling technique

There are two types of sampling techniques, namely random and non-random sampling. These two techniques can further be classified as purposive and non-purposive sampling. In both cases, the sampling can also be done conveniently or not. For this research, the chosen technique to select the companies and participants was non-random, purposive and convenience sampling. The main criteria for selecting a company included the company's willingness to participate in the research, and the company using an HRIS. Snowballing was used as a technique. Marshall (1996:523) defines snowballing as "a technique in which subjects recommend other suitable candidates". The sampling included HR managers (6), business analysts (4), talent acquisition specialists (2), and IT specialists (3) (section 4.3, Table 4.1). Table 3.1 shows the participants selected for interviews.

Table 3.1: Participants per pre-merger companies, position and years of experience

Code	Company	Position	Years of Experience
P1	A	HR Manager	10
P2	A	Programme Manager	14
P4	A	DevOps Technical Lead	16
P6	A	Process and User Experience Specialist	12
P7	A	Group Manager: HR Technology and Services	11
P11	A	HR Consultant	11
P13	A	Business Analyst	12
P14	A	HR Analyst	2
P3	B	Executive: Human Capital Enablement	3
P5	B	People Operations Lead	13
P8	B	HR Systems Analyst	4
P9	B	Human Capital Business Partner	6
P10	B	Talent Acquisition Specialist	8
P12	B	Learning and Development Coordinator	6
P15	B	HR Recruitment Team Leader	12

3.5 Data collection

Data collection refers to "the method of collecting the information relating to the research from the users, also called the participants, without their input the research will not be complete and useful" (De Vos et al., 2006:166). The study used a qualitative methodology to gather data. Data were collected by means of interviews using a semi-structured Interview guide (Appendix B).

3.5.1 Questionnaire

A questionnaire consists of several questions in a definite order on a form or set of forms (Kothari, 2004). Mukherjee (2020:76) defines a questionnaire as "a list of questions given out in a desired sequence, while an inventory/battery is a list of statements". Questionnaires are relatively easy to administer, low in costs, especially when participants are geographically dispersed, free from bias as answers are in the respondents' own words, and it is quick to collect data from multiple participants. Questionnaires can be open-ended (semi-structured), allowing the participants to use their own words to answer a question, or closed-ended (structured), asking the participants to tick one among the response categories indicated in the questionnaire (Mukherjee, 2020:76).

For this study, questionnaires were used to collect data from participants interacting with the HRIS to identify problems experienced with using the HRIS. This is corroborated by Nykiel (2007:55) who states that questionnaires have the following advantages: i) it can be used to collect data from participants who are widely dispersed; ii) the data collected using questionnaires can be analysed easily by the researcher; iii) questionnaires are cost and time effective; and iv) questionnaires are anonymous. The semi-structured questions enabled respondents to elaborate responses based on their opinions and experience. The semi-structured questionnaire was designed based on the research aim and objectives, including the information gathered during the literature review (Appendix B).

3.5.2 Interviews

Interviews were conducted on a face-to-face basis with participants from the two insurance organisations. This enabled the researcher to probe the views and ideas of the respondents and ensured that defined answers were obtained (Leedy & Ormrod, 2010; Nieuwenhuis, 2007; Ezzy, 2002). Each interview took approximately 30 minutes. An interview guide (Appendix B) was developed to guide the researcher through the interviews, ensuring that the same questions were asked to all participants. All the interviews have been recorded with permission of the participants.

3.6 Data analysis

Data analysis is the "process of analysing the data collected and transforming the data into useful information for the purpose of conducting research" (Braun et al., 2019).

The analysis started by transcribing the recorded interviews (Table 4.2; Appendix C). Once transcribed, the transcriptions were emailed to the participants to verify that the transcriptions are correct, and that the intent of the participant is correctly captured. After thoroughly reading the transcriptions several times, the researcher identified keywords, codes and concepts (Table 4.3). This was an iterative process to ensure that all possible codes were identified.

Thematic analysis was performed by identifying and combining synonyms, similar meaning words and concepts. Table 4.4 shows how codes and concepts were identified and linked. Each interview question was summarised into one or more findings. The findings were then summarised and categorised, and themes were developed. The themes were used to guide the discussion in Chapter 5.

3.7 Ethical considerations

Simons (2009) refers to a democratic ethics model of fairness, justice and equity. The model highlights the interrelationship between the three key concepts, which are: i) confidentiality; ii) negotiation; and iii) accessibility. Confidentiality ensures that the data are trustworthy, credible, and valid. Negotiation involves research that is not harmful to individuals. Accessibility refers to the need to communicate concise information (Simon, 2009:101).

The following principles were adhered to during the research:
   i)   **Autonomy:** Respect for the person.
   ii)   **Beneficence:** Benefit to the research participant.
   iii)   **Non-malfeasance:** Absence of harm to the research participant.
   iv)   **Justice:** Notably distributive justice—equal distribution of risks and benefits between communities.
   v)   **Ethical practice in relation to research colleagues:** All sources of information and support were acknowledged, and interviewees were assured that the findings would not be used for the personal gain of the researcher. The participants voluntarily participated and could withdraw from the research at any time.
   vi)   **Ethical practice in relation to research participants:** The purpose of the study and the anticipated research were made clear at the outset. Permission to use their insight in the research was obtained from both the company and each interviewee. Honesty, clarity, comprehensiveness and accountability were practiced.
   vii)   **The research treated all the respondents as anonymous.** The research did not identify any participants in any way whatsoever. The research findings were disseminated to the participants for peer review to validate their responses.
   viii) **Ethical practice in relation to the environment:** The research did not cause any harm to the participants or the environment and natural resources. No hazardous material was used during this study.
   ix)   **Ethical practice in relation to the South African society:** The researcher recognises societies' right of timely access to all research findings, which is open for debating any implications. This research aimed to assist South African businesses that are merging.

3.8 Delineation

This research was focused on two insurance institutions that merged. The merged organisation is based in the finance industry. The study focused solely on HR, the HRIS and IT departments.

The geographic location selected for the study was the Western Cape. All other insurance institutions in the Western Cape were excluded from the research due to time and financial constraints and the unwillingness of other organisations to participate in the research. No generalisation has been attempted with the results of the study.

3.9 Summary

Chapter 3 outlined the research philosophy, methodology, approach, strategy and methods used for collecting and analysing the data. The philosophical approaches used helped the researcher to determine the impact of the HRIS in a real-life situation through ontology, epistemology and methodology. The ontological stance was subjectivist and the epistemological stance was interpretive.

Research philosophy: This research was based on subjectivist ontology and interpretivist epistemology.

Research approach: This study followed an inductive qualitative research approach.

Research strategy: A case study was chosen as the research strategy. Using an insurance services institution as a case, exploratory research was undertaken to understand the situation from various perspectives.

UOA: The unit of analysis was two insurance organisations using the HRIS that merged into one organisation. The organisations have comparable units because both organisations are utilising an HRIS system.

UOO: The unit of observation comprised purposively selected participants in the HR (10) and IT departments (5) (section 4.3) who utilise the HRIS on a regular basis. Data collected for the research were gathered during interviews with managers in the HR and IT department at senior, middle and lower-level positions. Semi-structured questionnaires (Appendix B) and interviews were conducted with eight (8) participants in Company A and seven (7) participants in Company B.

Sampling: For the purpose of this research, the chosen technique used was non-random, purposive, convenient sampling to select the companies and participants. The main criteria for selecting a company were the company's willingness to participate in the research, and whether the company was using an HRIS. Snowballing was used as a technique. Marshall

(1996:523) defines snowballing as "a technique in which subjects recommend other suitable candidates". The sampling included HR managers (6), business analysts (4), talent acquisition specialists (2) and IT specialists (3) (section 4.3, Table 4.1). Table 4.1 shows the participants selected for the interview.

Data collection: The study used a qualitative methodology to gather data. Data were collected by means of interviews using a semi-structured interview guide (Appendix B).

Data analysis: Interviews were undertaken, transcribed, and analysed. Responses were coded, summarised, categorised and a thematic analysis was undertaken.

This research focused on the merger of two insurance organisations based in the Western Cape that utilise the HRIS tool. The research aimed to explore the factors influencing the adoption, implementation, benefit, contribution and effective use of the HRIS. The research adhered to all the ethical requirements as prescribed by the faculty of Business and Management Science at CPUT.

In the next chapter (4), the analysis and results of the interviews are discussed.

CHAPTER 4: ANALYSIS AND FINDINGS

Figure 4.1: Layout of Chapter 4

4.1   Introduction

This chapter presents the analysis and results of the qualitative data collected and used in the study. The study focused on two insurance companies in the financial services sector that merged. Chapter 4 expands on the interviews conducted during the research process and the findings were formulated based on the analysis of the data provided by 15 participants. For the reader's convenience the problem statement, research questions and aim of the study are again listed.

Problem statement: It is challenging for the newly-formed organisation to integrate and maintain the HRIS during and after M&A in order to gain the potential benefits.

The research questions:

  RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?

  RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

Aim of the study: The aim of the study was to explore the reasons for HRIS integration failure before and after M&A.

4.2 The case

This research was based on a case study and focused on how an HRIS can be difficult to integrate and maintain during M&A. An insurance services company operating in Cape Town, South Africa, was chosen for the research.

Before merger: Company A is a insurance services provider with a legacy of over 120 years and was one of the largest insurance services companies in South Africa. Company B was established in 1966 and provides professional insurance, financial solutions and products. The HRIS that was used in Company A prior to the merger was Oracle PeopleSoft and Company B used Oracle E-business Suite.

After merger: Company A merged with Company B in 2010 forming Company C. Both companies operate in different markets where Company B's focus was the upper-income market segment and Company A predominantly focused on the lower to middle-income markets.

Company C was born from the merger of Company A and Company B. The merger established the third largest insurer in South Africa, which is listed on the JSE. Although these companies merged, the client base is in different markets. IT as well as HR merged and agreed to integrate into one HRIS system. The chosen system was Oracle PeopleSoft. Company C employs 17,000+ employees. After the merger, the business compromises of six merged entities, namely: the i) rewards programme; ii) financial business; iii) financial advisory business; iv) insurance and risk solutions; v) property development and management; and vi) health applications.

4.3 The participants

Fifteen participants of Company C (merged company) were interviewed. Eight participants were from Company A (based in Cape Town, South Africa) and seven from Company B (based in Johannesburg, South Africa). All participants have been affected by the merger. Participants were from various seniority levels within the pre-merger organisations. To protect the identity of the interviewers, the findings are represented anonymously (Table 4.1). All the participants gave written consent for the interviews to be conducted in this study (Appendix A).

Table 4.1: Participants employment position, company, and years of experience

Code	Company	Position	Years of Experience
P1	A	HR Manager	10
P2	A	Programme Manager	14
P4	A	DevOps Technical Lead	16
P6	A	Process and User Experience Specialist	12

Code	Company	Position	Years of Experience
P7	A	Group Manager: HR Technology and Services	11
P11	A	HR Consultant	11
P13	A	Business Analyst	12
P14	A	HR Analyst	2
P3	B	Executive: Human Capital Enablement	3
P5	B	People Operations Lead	13
P8	B	HR Systems Analyst	4
P9	B	Human Capital Business Partner	6
P10	B	Talent Acquisition Specialist	8
P12	B	Learning and Development Coordinator	6
P15	B	HR Recruitment Team Leader	12

4.4 Data analysis

The analysis started by transcribing the recorded interviews (Table 4.2; Appendix C). Once transcribed, the transcriptions were emailed to the participants to verify that the transcriptions are correct and that the intent of each participant has been captured correctly.

Table 4.2: An example of a transcribed interview (yellow highlights present the key words and concepts)

INTERVIEW TRANSCRIPTION P1
IQ1.1.1: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?
Interviewer: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not? **P1:** Yes, the HRIS is called PeopleSoft.
IQ1.1.2: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?
Interviewer: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not? **P1:** So when you talk about all employees we have commission based employees that don't have access because they are on a different system completely but definitely all permanent staff have access. **Interviewer:** Okay and the level of access is it role dependent or not? **P1:** Yes, So generally, you have your basic ESS system where you can apply for leave, check your payslips and stuff like that. That will be for all employees. Then you get your different levels of management. Manager level access would be for, to view different reports and stuff like that with regards to their area. Then you will have the HR access which has got full access to all employees.
IQ1.1.3: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?
Interviewer: And then, does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not? **P1:** So we do a lot of e-training, where we send videos around to, to, to, if there are any changes to the system. But like uh, uh, you know when you are an employee you must ask yourself how often do you actually use the system. If you take a manager for example, that uh has to use it for reporting and stuff like that we, we, try and do one-on-one training with them or else they use the videos that they receive. But we normally deal with queries as they come along. So in other words, an employee will log on this month and he needs to do something although

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we send out a document to say this is how you do it, we understand that if people are not going to look at it they are not going to use it. Make sense? So ==when they use it we will deal with it at that time.==
Interviewer: Okay, but uh like a new user, do they get training?
P1: Oh yes, ==they go through it as part of their induction,== they get a ==basic rundown on the system== and whatever.

After thoroughly reading the transcriptions several times, codes and concepts (Table 4.3) were identified.

Table 4.3: Example of identified codes and concepts (yellow highlights present the codes and concepts)

IQ #	Research Question	Participant 1	Codes
1.1.1	Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?	The company uses ==Oracle PeopleSoft== as our HRIS. PeopleSoft was first introduced to the company in 2005. It is an ==ERP== solution that integrates human capital management, financial management, supplier relationship management, enterprise services automation and supply chain management.	Oracle PeopleSoft ERP
1.1.2	Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?	So when you talk about all employees we have uh commission based employees that don't have ==access== because they on a different system completely but definitely all permanent staff have access. The ==access is role dependent==. So generally, you have your basic ESS system Uh where you can apply for leave, check your payslips and stuff like that. That will be for all employees. Then you get your different levels of management. Manager level access would be for, to view different uh reports and stuff like that with regards to their area. Then you will have the HR access which has got full access to all employees.	Access Role dependent
1.1.3	Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?	So we do a lot of online ==training==, uh where we send videos around to, to, to, if there are any changes to the system. But like uh, uh, you know when you are an employee you must ask yourself how often do you actually use the system? If you take a manager for example, that uh has to use it for reporting and stuff like that we, we, try and do one-on-one ==training== with them or else they use the videos that they receive. But we normally deal with queries as they come along. So in other words, an employee will log on this month and he needs to do something although we send out a document to say this is how you do it, we understand that if people are not going to look at it they are not going to use it. Make sense? So when they use it we will deal with it at that time. New users get ==training== as part of their ==induction== and get a basic run down of the system.	Training Induction

This was an iterative process to ensure that all possible codes were identified. This was done by identifying and combining synonyms, similar meaning words and concepts.

Table 4.4 below shows how codes and concepts were identified and linked.

Table 4.4: How codes and concepts were identified (yellow highlights present the codes and concepts)

Participant 12	Participant 13	Participant 14	Summary
Change management, change is constant and if we're looking at systems - they are upgraded constantly. In this world digitalisation is a big thing. If you look at HR, HR in 2014 is completely different to HR today. Post-merger - training and communication is very important so that employees are equipped with the knowledge to use systems and things and still transparency you know is very important. Keeping employees interested in work and understanding what actually motivates employees is also important and in that same way you are able to retain employees and reduce employee turnover and sort of like you gain the trust of the employees. I think if you work towards rebuilding the trust with the employees, keeping that transparency and integrity employees will tend to trust you.	For a company that comes on board post-merger - the business should be time conscious to allow the other company to understand the system and requirements. You have to do a proper analysis outlining data criteria. Also change management and communication for employees to understand the system etc.	Constant change management and communication. Ensuring all employees are aligned in terms of new process and systems.	Employees would rather feel like they have too much information than not enough information. The long term success of the merged company depends on the communication strategy to communicate with employees. Communication is very important to enable employees to be equipped with the knowledge on the use of the system. Businesses should have a proper change management plan that outlines communication to all employees. Constant change management and communication is key to ensuring employees are aligned in terms of new processes and systems.

In the next section, the answers to the interview questions are presented. Examples of interviews are given, and each interview question is summarised into one or more findings. The findings are then summarised, categorised and themes are developed.

4.5   Findings

This section elaborates on the findings derived from the interviews conducted during the study. In this chapter, the information from the interview transcriptions is presented according to the research questions (RQs), research sub-questions (RSQs) and the specific interview question (IQ), linked to the RSQ.

The section is structured as follows: i) findings for Company A; ii) findings for Company B; and iii) summary.

4.5.1 Company A

The eight participants interviewed in Company A are P1, P2, P4, P6, P7, P11, P13 and P14.

4.5.1.1 Research question 1

RQ1:   What are the reasons for ineffective HRIS implementation in organisations during M&A?

RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?

IQ 1.1.1: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?

The rationale for asking this question was to determine if the organisations made use of an HRIS, and which system was being used.

All eight participants confirmed that there was an HRIS in place called Oracle PeopleSoft. According to P1, "the company uses Oracle PeopleSoft as our HRIS. PeopleSoft was first introduced to the company in 2005. It is an ERP solution that integrates human capital management, financial management, supplier relationship management, enterprise services automation and supply chain management" (Appendix C). The organisation underwent an intensive process to identify which system would be adopted by the business during the merger. It was decided that between E-business Suit and Oracle PeopleSoft, the latter (Oracle PeopleSoft) is the better option for a variety of reasons, including cost, integration, user interface and user interface, among others.

Finding 1: PeopleSoft was used as the HRIS in Company A

IQ 1.1.2: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?

The rationale for this question was to determine if all employees had access to the HRIS and how their access impacted on the effective implementation of the HRIS during M&A. Each of the eight participants indicated that not all employees had access to Oracle PeopleSoft. For example, P6 said that "not all employees had access to PeopleSoft. It would only be permanent staff and contractors directly employed with the company. The access level was dependent on your position within the company" (Appendix C).

Finding 2: Not all employees of Company A had access to the Oracle PeopleSoft system

IQ 1.1.3: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?

The rationale for this question was to determine if the organisations conduct training to equip their employees on how to make good use of the system.

Four participants (P1, P5, P11, P14) responded positively to training being conducted within the company. According to P4, "We tried to develop the system so that it is easy to use and so that no training is required. For example, if Facebook updates their application, they don't give people training so we sort of try to follow the same approach" (Appendix C). P11 indicated that the training provided is "more on the job training, there are manuals for guidance as well" (Appendix C). P2, P7 and P13 indicated that no formal training was conducted.

P7 emphasised that,

> "Following the merger the company had training manuals for everything. We don't want employees to have a laborious process and a system that they don't understand so we've designed the system to be intuitive and to reduce the number of clicks" (Appendix C).

P2 added that "the whole basis is that we are supposed to build a system intuitively enough that we don't need guidance" (Appendix C). P6 advised that they were not sure if training was provided:

> "I'm not sure, I would assume that they're doing training during induction. I know that there is communication that goes out on how to do certain things, for example, if you have to load your KPIs for performance reviews or if you want to do your salary checks or your IRP5, they will show like little steps on how to do it. So, I think that is as far as I know in terms of training. I don't think there is formal training for new starters but there are manuals available on how to use the system" (Appendix C).

Finding 3: There is a lack of formal training in Company A

Finding 4: There is uncertainty around the type of training provided and a confidentiality agreement is signed before access is granted to sensitive information

Finding 5: The most intuitive systems can seem imposing when employees and managers are unfamiliar with the appearance, functions and processes of the system

Finding 6: Not all employees and managers are involved in the implementation and adoption of the system

IQ 1.1.4: *Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g., software against computer hacking and anti-virus)*

This question was posed to determine if the companies have information security to guard the HRIS and how effective the protection of the system is.

Six participants (P1, P2, P4, P7, P13, P14) indicated that there was effective information security in place. According to P4, "you can only access the system with a secure username and password. We do lots of security with SSL encryption. The data are behind a fire wall" (Appendix C). P7 added that "PeopleSoft (pre-merger HRIS) has got its own built-in security model but on top of that we've got our own firewall and we actually use the services provided by our IT department" (Appendix C).

P6 and P11 indicated that they were not sure there is effective information security in place to safeguard the HRIS. P11 stated: "I think there is, I do have an awareness that the system is constantly being updated in terms of security" (Appendix C). P6 and P11 said there was security in place, which stemmed from the IT department. Ps also added that a secure username and password as part of the security was in place. P2 commented: "There is an absolutely rigorous system in place both inside and at every point of integration. There is embedded security throughout, anti-virus and so on" (Appendix C). All the data are behind a firewall which stems from PeopleSoft and the IT department.

Finding 7: There was information security in place to safeguard Oracle PeopleSoft at Company A

Finding 8: Access to the system was limited through a secure username and password

IQ 1.1.5: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A?

The participants of Company A specified the critical success factors as follows:

i) *Leadership:* Most of the participants (7 of 8) stated that leadership was a critical factor experienced throughout the integration process of the HRIS during M&A. According to P6, "from a leadership perspective there was not proper information being shared" (Appendix C).

ii) *Software and development:* P1, P4, P7, P11 and P13 argued that software and development was a critical factor in the implementation process. P1 added, "Software and development would be as well, same thing, you would have your two sets of software and IT" (Appendix C).

iii) *Communication:* All participants agreed that communication was a critical process in the integration process. P4 said, "If there is not proper communication, we all know

what can happen if people don't communicate effectively for example, misinterpretation, mistrust, low morale, low productivity etc." (Appendix C).

iv) *Change management:* All participants identified change management as a critical factor. P7 said: "I do feel that if we had more of an effective change management plan or strategy in place, the company would have been able to focus on top priorities, engage and empower employees, and reduce disturbances in the workplace". (Appendix C). P6 emphasised that "change management wasn't successful and this impacted the culture which is still not aligned today" (Appendix C).

v) *Culture:* In the M&A integration process, culture typically stands in the way of some of the transition and change. Seven participants (P1, P2, P4, P6, P7, P11, P13) indicated that the culture was affected. P11 said that "there was no provision for the human factor during the merger process and as employees we just had to accept it and had little participation in the process" (Appendix C).

vi) *Employee turnover:* Five participants (P1, P4, P7, P13, P14) indicated that employee turnover was negatively affected. P13 said that "our employee turnover as well went from a large amount of people to a smaller amount as mergers tend to result in job losses for employees in redundant areas in the combined company" (Appendix C). P14 noted that "employees generally see change as a threat which results in an increase in employee turnover because of the uncertainty about the future direction of the organisation and uncertainty about personal job security" (Appendix C).

vii) *Job satisfaction:* Five participants (P1, P4, P7, P11, P13) stated that job satisfaction was negatively affected. P11 said: "there was some decrease in job satisfaction because of all the change that was happening" (Appendix C). P1 also said that "most people didn't even know if they had a job at that time. There was a decrease in job satisfaction as absenteeism and turnover increased which resulted in an overall low work drive" (Appendix C).

viii) *Performance appraisals:* Six participants (P1, P4, P7, P11, P13, P14) indicated the performance appraisals was impacted. P11 noted that "performance appraisals were not immediately impacted—obviously, we changed the process to align with the current business requirements" (Appendix C). P14 said: "You need to be cognisant on when the M&A occurs so either prior to the performance rating/review stage of after. You would then have to adjust the process accordingly and consider the new employees that have no history or knowledge of the current process or system" (Appendix C).

ix) *Other factors:* An important factor also mentioned was data transfer. Incorrect data transfers can create challenges for Company C, resulting in significant losses. P2 mentioned that "transferring accurate data at the point of the merger and having the

data in a format that works for example, bringing leave balances across the different companies, benefit differences (provident fund & pension fund)" (Appendix C).

Finding 9: Leadership was identified as a critical factor

Finding 10: The lack of a software and development plan impacted on integration

Finding 11: Lack of communication resulted in misinterpretation, mistrust, low morale and low productivity

Finding 12: There was a change management process in place but it was not effective, and this had an impact on other factors in the company

Finding 13: Culture stood in the way of some of the transitions and changes

Finding 14: Employee turnover was high because of the uncertainty

Finding 15: Job satisfaction was negatively affected because of uncertainty, changes in management, the fear of downsizing and potential job losses

IQ 1.1.6: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?

This question was asked to understand whether the size of an organisation contributes to the effective implementation of an HRIS.

Three participants (P2, P4, P6) did not agree that the size of the organisation and its operations impacted on the effectiveness of the HRIS. P2 said, "I think the size just means that you've got to be more careful in catering for a variety of needs" (Appendix C).

P4 added that,

"It all depends on the practice required so whether you do something for two employees or five hundred employees it's the same work that is just my opinion. Obviously, the numbers add a bit more complexity but does [sic] not determine the effectiveness of the system. It is more dependent around what you need to deliver and what your requirements are whether it's two or thousands of employees, it's the same" (Appendix C).

However, five participants (P1, P7, P11, P13, P14) indicated that the size of the organisation and its operations did impact on the effectiveness of the HRIS. HRIS is a major investment by the organisation, and it is therefore important to be mindful of the costs.

Both the size and the maturity of the company play a role and are equally important. Maturity of the company plays an important role in the implementation process of the HRIS system. Company A perceived itself as a mature company with mature business processes.

P7 argued that,

> "It all depends on how mature your processes are—if you want to use the full functionality that is provided you need to have maturity across all your different HR practices in order to sweat the asset. The more mature the HR community and HR processes is [sic], the more you can use the HRIS. If it's a small company, you can probably get away with not having an HRIS but for a company like ours you actually need to have one" (Appendix C).

P14 also indicated that "the HRIS should be able to adapt to the various operational changes within the organisation" (Appendix C).

Finding 16: The size of the business added more complexity but did not determine the effectiveness of the HRIS

Finding 17: The effectiveness of the HRIS is dependent on the maturity across different HR processes

IQ 1.1.7: *Is there effective teamwork and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? If no, why not?*

The question was posed to establish the existence of teamwork and staff participation among the employees to support the implementation process of the HRIS.

Seven participants (P1, P2, P4, P7, P11, P13, P14) of Company A confirmed the existence of sufficient teamwork and staff participation in the organisation to support the implementation process of the HRIS, while P6, a Process and User Experience Specialist, indicated the contrary. According to P2,

> "There is a shared goal and we also all realised we need people data to make decisions even more so in a merger. I mean when the companies merged—we had duplicated roles and how would we know if we couldn't pull a report saying that these are all the Human Capital people" (Appendix C).

P6 did not agree with the other participants and stated: "One company had effective change management plans in place and had defined roles for each task whereas the other company did not" (Appendix C).

Finding 18: Not all departments were participating and had good teamwork in place

IQ 1.1.8: *Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?*

From the perspective of three of the eight participants (P4, P11, P13), they rated management confidence high in Company A. According to P11, "to management it seems to be working and providing the tools that they need" (Appendix C).

P13 also indicated that,

> "Initially, maybe after the merger there was a bit of uhm distrust especially considering the data integrity and since then we when we became aware of it and we put a lot of security measures in place in order to secure the system. I would say that there is a high confidence now" (Appendix C).

Four of the eight participants (P1, P2, P6, P7) rated management satisfaction as medium. P2 said that there is "medium trust in the system. The only reason I don't say that it's high is because there's always questions around data" (Appendix C).

P6 also said:

> "I would say medium. Again, coming back to the things that I've mentioned— stability, uhm security around it because there are those faults uhm and then the working of it so it's not, it's simple for the basic things but it's not as informative on how-to and it's not always user friendly. Sometimes the information on the system is not always 100% accurate and there is a lot of space for error, it can be human error. So, the system itself that I've seen doesn't have anything to safeguard it from this because its humans working on it and making the changes so human errors occur more often than it should in this kind of application or this kind of system. There should be more processes in place to eliminate human error" (Appendix C).

P14 rated management satisfaction as low. P14 opined that "it is due to the fact that the system often does not perform at an optimum level. Many features aren't used on the system" (Appendix C).

Finding 19: Management's confidence and trust in the system is negatively affected by limited exposure to certain functionalities on the system, incorrect data and insufficient training on new processes

IQ 1.1.9: *Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?*

Six of the eight participants (P1, P2, P4, P7, P11, 14) indicated that a new culture did not present itself after the merger.

P2 added that,

> "We actually dissipated both cultures and that's when we started losing money. These cultures were so far apart I almost want to go and say it was not a good merger. It's too far apart, I don't see any middle ground, our products are different, our markets are different, our style is different, our pricing models, everything is different. We decided that we are going back to being full whole independent businesses" (Appendix C).

P7 highlighted that,

> "The aspirations were there to have one culture for the group but I think—it was completely underrated of how different the cultures in the different businesses are. The aspiration to have one culture in my mind never really got off the ground—yes we have one set of values, one set of perspectives but how it was executed in the business although I think the aspiration was to say we will create one culture, it never did and I think even at this point in time we still don't have one culture" (Appendix C).

P11 added that "there was not a common merged culture it was more the one culture would be absorbed into the more predominant culture" (Appendix C). Two participants (P6, P13) indicated that a new culture did present itself after the merger. P13 said that "a new culture has definitely emerged after the merger. It is definitely a more performance-driven culture that we have now. We had more of a family-orientated previously. So now it is more business focused, constant change in terms of technology even from a PeopleSoft perspective" (Appendix C).

Finding 20: Creating a unified culture during a merger is important

Finding 21: Culture clashes happened during the merger

Finding 22: There is an objective to create one culture after the merger

IQ 1.1.10: What is your opinion of the new culture? If yes, why do you say so? If no, why not?

There are different opinions on whether a new culture has been established or adopted. However, most participants (6 of 8) were of the opinion that a new culture did not really present itself after the merger. P2 added that the culture,

> "…is fine now that we've said let each be our own brand and leverage off each other's traits. We should have done that from the beginning, it's the best thing we've done. After the merger the culture was confusing, nobody knew what it was and a lot of people in Company A said that it was supposed to be a merger, but it felt like a takeover" (Appendix C).

P11 said:

"I think the culture is still very different if you had to look at the companies in isolation. I mean we split the companies in terms of branding etc. because each company has its own target client base. I feel like in terms of values you would adopt the culture and values depending on which business unit you are based in. I don't think that there has been a common culture, if you do however change businesses you have to adapt to whatever culture is in that business" (Appendix C).

P13 also noted that "in certain aspects it still feels like Company A and Company B are separate entities. I think the values are binding the two companies" (Appendix C). P14 said that "the new culture is the same as the company that had the most employees as they moved over to their offices" (Appendix C).

Finding 23: A new culture did not develop during the merger

RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?

IQ 1.2.1: What strategies should be put in place prior to M&A?

The participants established a list of strategies that should be put in place prior to M&A. The strategies that were listed are communication, planning, data and benefit alignment, data security, change management, IT and HR being more involved in initial M&A conversations and creating one HR strategy. P7 indicated, "The first thing that we realised when we actually started the discussions after the merger was approved was that we had vastly different HR practices and to get those two together from a strategic perspective would be a challenge" (Appendix C).

P11 said: "If the right people were included upfront, it would have made a difference, but I don't think enough or the relevant individuals were included in the merger related discussions" (Appendix C). P14 also said: "Ensure that change management is implemented, ensure that both companies are trained on systems, know about values and change" (Appendix C).

Finding 24: Both companies had different HR practices

Finding 25: One HR strategy was not created prior to the M&A

IQ 1.2.2: What strategies should be put in place post-M&A?

The objective of this question was to determine recommendations of processes that should have been put into place after the merger.

The common strategies identified were effective change management and constant communication. P6 noted: "Have a system stability plan because there are more users being put onto the system. So, making sure employee information is correct. Yes, duplication of data is currently an issue" (Appendix C). P7 highlighted that it is crucial for HR to have a strategy that is being executed properly. P7 said that "it is critical that it supports what the business wants to achieve because if there is a gap in there then nobody will use the system. In our case I think there are lots of examples where that actually is happening" (Appendix C).

P11 added that "back then it was a lot about not effectively communicating to employees. I felt that everyone should be informed with anything regarding the merger, not only the people that were directly impacted by the merger" (Appendix C). P13 went on saying that "for a company that comes on board post-merger—the business should be time conscious to allow the other company to understand the system and requirements. You have to do a proper analysis outlining data criteria. Also change management and communication for employees to understand the system etc." (Appendix C). P14 mentioned change management as an important strategy for the merger. P14 said: "Constant change management and communication. Ensuring all employees are aligned in terms of new process and systems" (Appendix C).

Finding 26: Strategies that should be put in place post-merger are change management, communication, and implementing an HR strategy that takes in to account the maturity of HR processes and training

IQ 1.2.3: *What HRIS system was used prior to the M&A?*

Four participants (P1, P4, P7, P14), identified that PeopleSoft as HRIS for Company A and Oracle E-business Suite were used, while four participants (P2, P6, P11, P13) from Company A were unsure of what system was used prior to the merger by Company B.

Finding 27: The employees of Company A was unsure what system Company B used prior to the merger

IQ 1.2.4: *Does the implementation of the HRIS assist your organisation to accomplish the following business processes listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?*

The business processes listed were: i) recruitment and selection; ii) training and development; iii) recognition and rewards; and (iv) payroll. All eight participants (P1, P2, P4, P6, P7, P11,

P13, P14) agreed that they have achieved all strategies listed in the implementation process. Other strategies that were mentioned by P2 included "performance, pre-onboarding and talent management" (Appendix C).

Finding 28: Recruitment and selection, training and development, recognition and rewards as well as payroll were all accomplished by the HRIS

Finding 29: Other business processes mentioned were performance, pre-onboarding and talent management

IQ 1.2.5: *How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?*

Seven participants (P1, P2, P4, P6, P11, P13, P14) indicated that the capturing, recording and retrieval of data are effective. Notwithstanding, P2 noted that "keeping that data up to date and correct is a consistent challenge" (Appendix C). P7 indicated that it is not effective. P7 added that "the problem is between the chair and the actual keyboard. I think the way that we require capturing to be done and the recording and retrieval thereof is not necessarily as simple as we would want it to be. We are moving towards that objective" (Appendix C).

Finding 30: Keeping data up to date and correct is a challenge

IQ 1.2.6: *Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?*

Eight participants (P1, P2, P4, P6, P7, P11, P13, P14) stated that HRIS does provide confidentiality, privacy and security of the personnel information of the employees.

Finding 31: The HRIS provides confidentiality, privacy and security

4.5.1.2 Research question 2

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?

IQ 2.1.1: *Indicate which of these modules are implemented by the HRIS of your organisation?*

The following modules were identified as being implemented in Company A: Payroll, time management, benefit administration i.e., retirement, medical aid, recruitment and selection, performance, employee self-service, and analytics.

i) *Payroll:* All the participants (P1, P2, P4, P6, P7, P11, P13, P14) stated that they use the payroll modules on PeopleSoft. P2 stated: "Our payroll functionality has improved since the merger. Payroll is all compensation that the organisation needs to pay its employees" (Appendix C).

ii) *Time Management:* All participants acknowledged that there is no time management module on PeopleSoft and as a result, time management was not done. P14 indicated, "...besides time management—this is done via a biometric system and is not captured on the HRIS" (Appendix C).

iii) *Benefit administration:* According to P2, there was no or little benefit administration in Company A. P2 stated that after the merger, "…we now have a total rewards statement that is included above just being able to see your payslip" (Appendix C).

iv) *Performance:* There was no performance system before the merger. Again, P2 noted that after the merger the performance module was implemented and that "our annual performance review happens on the system" (Appendix C).

v) *Employee self-service:* The ESS (Employee Self-Service) module in PeopleSoft is used, according to all participants. P11 highlighted that "ESS provides employees with access to their personal records and other payroll and benefit information" (Appendix C).

vi) *Analytics:* All participants gave a positive indication that they do have the analytics module on PeopleSoft. P4 noted: "We make use of the analytical functionalities, but the majority of the analytics is done via Qlikview where we go through a ETL (Extract, Transform, Load) process" (Appendix C).

Three participants (P6, P7, P13) identified other modules in the HRIS, namely: i) e-Learning; and ii) manager self-service.

P7 said:

> "e-Learning is not on PeopleSoft, it is actually a completely different ERP. You would not know it from an end user perspective, but it is two completely different systems. The demand for more learning or how you deliver the learning content is very high than what PeopleSoft provides from a functional perspective" (Appendix C).

P6 added: "The additional modules implemented that I can think of would be e-Learning and Manager Self-Service which allows managers to have immediate access to employee information and initiate employment-related actions".

P13 said: "Additional modules would include e-Learning and Manager Self-Service".

Finding 32: All modules besides time management are being utilised on the system

Finding 33: The e-Learning functionality is not hosted on PeopleSoft

Finding 34: There is limited use of the analytical functionalities and the majority of analytics is done via Qlikview

IQ 2.1.2: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?

Five participants (P1, P4, P6, P11, P13) indicated that the current modules suit the business needs.

P1 noted,

> "We can manipulate the system, like I said a lot of our development is done in-house. If we need something done, we can do it ourselves". P11 said that it is effective for now. However, it is to which extent are you going to use the system. Although if I think about technological capabilities, I don't think the system will be able to keep abreast with all the changes in comparison with other more advanced HRISs" (Appendix C).

Three participants (P2, P7, P14) stated that the current HRIS modules do not completely suit the business. P7 indicated,

> "I don't believe that you're going to get an HRIS that talks 100% ever to what an organisation wants to be delivered through an HRIS so you're always going to have a different set of business rules that is not catered for on the system and what we do in that regard is actually to try and customise the system for our needs as a business" (Appendix C).

P14 said: "I do not think all the modules suit the business. Not all modules on the system are being utilised efficiently and effectively. This could possibly be around lack of training and being unaware of all the functionalities that the system offers" (Appendix C). The majority of participants however gave a more positive response.

Finding 35: The modules suit the business but there is a need for modification

Finding 36: Not all modules are being utilised efficiently and effectively

IQ 2.1.3: *Which of the HRIS modules are frequently used by your organisation?*

All the participants indicated that most modules are frequently being used. However, certain modules such as performance are not used on a regular basis. P2 noted that "the performance functionality is only used twice a year" (Appendix C).

P7 added:
> "…some parts of the business make use of certain functionality a little bit more, but the functionality itself is built and configured on whether the organisation needs not necessarily what the specific business within the organisation needs are" (Appendix C).

Finding 37: Most modules of the system are being used by the organisation but some are used more often than others

IQ 2.1.4: *Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not?*

Five participants (P1, P2, P4, P7, P14) indicated that PeopleSoft is not regularly upgraded. This is before as well as after the merger. P2 said that "…we did an upgrade to PeopleSoft version 9.2 in 2016. That was the last big upgrade that I am aware of. In terms of system maintenance—this is updated regularly" (Appendix C).

P7 mentioned that,
> "We do but way too little. It is way too big of an exercise. It's a massive exercise so the reason why it's actually complex in our case, is when we have to upgrade because of all the customisations on the system. Technically, you would have to rebuild everything that was customised on the system on the newer version as well. The previous upgrade we've done in 2016 it took us 10 months to do it. Yes, and then at that point in time you actually holt [sic] the entire business" (Appendix C).

P6, P11 and P13 agreed that they are not sure. P6 said: "I don't get involved in the upgrades and software development because IT does not support PeopleSoft they have got their own support team" (Appendix C).

Finding 38: PeopleSoft is not regularly upgraded

Finding 39: It is a massive exercise to upgrade PeopleSoft because all of the customisation that would need to be rebuilt

Finding 40: IT does not support PeopleSoft; PeopleSoft has their own support team

IQ 2.1.5: *How would you rate the contribution of HRIS to the continuity and success of your organisation?*

Participants P1, P4, P11, P13 and P14 rated the contribution of PeopleSoft to the continuity and success of the organisation as high because the system is regarded as important and used to manage employee data. P4 said: "We only deliver on what the business wants. So I would say yes it enables the business to basically do what they need to from a HR point of view. The system is also vital to manage employee information" (Appendix C).

P14 added that the "full dependence of employee data and payroll is on the HRIS. Although, it does depend on the accuracy of the data being captured on the system as HR decision making stems from this data" (Appendix C). Two participants (P2, P6) rated the PeopleSoft contribution to the continuity and success of the organisation as medium. They argued that there are still lots of room for improvement. P6 argued that "the system does enable the business to keep a proper record of employee information although it does not contribute to any profit for the business" (Appendix C).

P7 rated the contribution low because,

> "We are not 100% at the predictive analytics stage but that's where you would want to be, you always want to be in a position where you start making use of your system for succession planning, pipeline and all of those kinds of functionalities that is in the system automatically. We are not there yet so that's why I would say low" (Appendix C).

Finding 41: HRIS is a contributor to the continuity and success of the organisation

Finding 42: The business is not utilising predictive analysis on PeopleSoft

Finding 43: HR decision making stems from accurate data on the system

IQ 2.1.6: *How would you rate management satisfaction with the HRIS?*

P4 and P13 rated management satisfaction as high because P4 argued that "we deliver on what the practice owners want on the system. If there are any issues, people tend to blame the system but, in my opinion, it would be the practice owners and not the system because the system does what the business wants and how they want it" (Appendix C).

Five participants (P1, P2, P6, P7, P11) rated management satisfaction as medium because of limited functionality, inconsistency, and the instability of the system.

According to P7,

> "You never going to get to a perfect system in terms of satisfaction for this kind of business and the size of the business because every division within this business needs are different. Again the functional requirements that we provide is based on what the specific process or practice owner wants us to deliver on the system and not necessarily what management wants out of the system" (Appendix C).

P11 commented, "I think for certain levels of management it works well for others they still believe in manual process" (Appendix C).

P14 rated management's satisfaction as low because of the user experience and functionality of the system: "There is still a lot of push back from management to do things via the system instead of doing things manually" (Appendix C).

Finding 44: Management's satisfaction is rated as medium for PeopleSoft

Finding 45: Management's input to the HRIS is ignored

Finding 46: Management still believes in manual processes

IQ 2.1.7: *How would you rate staff satisfaction with the HRIS?*

P4, P11 and P13 were of the opinion that staff satisfaction is high as there are fewer complaints than before.

P4 stated that,

> "In general, with the merger and acquisition there was a lot of uncertainty, doubt and negativity in one company. If I look at the other company the whole merger went our way where we kept People Soft and we integrated within the group, so our experience is different with how it affected us. So, it depends on how you were affected by the merger" (Appendix C).

P1, P2, P6, P7, P14 rated staff satisfaction as medium. P2 added: "People have different needs, so you won't always please every single person" (Appendix C). P6 indicated the following: "PeopleSoft was chosen as the system that was going to be used after the merger, so staff was not really impacted as we were already familiar with the system and its capabilities" (Appendix C). P7 said: "Before the merger the UX and UI was not very intuitive. It was hard to locate certain functions on the system and there were lots of clicks as well" (Appendix C).

Finding 47: Staff satisfaction with the use of the system is generally rated as medium

Finding 48: Before the merger the UX and UI on PeopleSoft were not intuitive

RSQ 2.2: **How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?**

IQ 2.2.1: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?

Seven participants (P1, P2, P4, P6, P11, P13, P14) agreed that the HRIS was able to contribute to the efficiency and effectiveness of departmental activities during the M&A. P1 commented, "in terms of onboarding new employees onto the system as well as process automation and reporting capabilities" (Appendix C). P2 also added "…you have to be able to extract accurate data and there is so much data that enables you to manage a merger so yes the HRIS was able to contribute effectively and efficiently" (Appendix C).

However, P7 said,

> "We've got two different worlds that we're implementing on the HRIS. Let's start to look at getting those two together and the only way that you could achieve that is to say we need to have benefit alignment. It took a while before we could actually make it a better experience" (Appendix C).

Finding 49: The HRIS contributed to the efficiency and effectiveness through business process automation and reporting during the merger

Finding 50: Implementing benefit alignment is an important step in merging two companies

IQ 2.2.2: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?

All participants (P1, P2, P4, P6, P7, P11, P13, P14) identified the following benefits gained from using PeopleSoft: P1 said: "Usability and scalability across our businesses. PeopleSoft enables the business to facilitate workforce management, manage Human Resources and talent management to mention a few—on one central system" (Appendix C). P2 mentioned "data-enabling decision making and the automation of HR processes" (Appendix C) as a benefit. P4 explained that "there is one version of the truth, you have one HRIS system which is the authoritative source" (Appendix C).

P7 argued from a before and after merger context:

> "So, it's a one-stop solution for all staff, the costing definitely came down considerably, it was much more expensive with the other system that Company B used your support staff was much less. I mean at the end it was a matter of the nature of the functionality that Company B used on the E-business Suite that was really limited compared to how much functionality we can roll out on the Company A side. So, it took us a while

to get the total group to agree on one process being delivered from a PeopleSoft perspective" (Appendix C).

P11 added as benefit that "there is one central system. If you look at the payroll department—this department was centralised because you can't have two separate systems for payroll" (Appendix C). P13 opined that automation is a benefit: "...lots of automation was done on the system" (Appendix C). P14 mentioned centralisation as a benefit: "Centralisation of payroll function as well as ensuring that the audit and clean data on the system" (Appendix C0). P6 argued that there are no benefits: "To be honest with you from my experience both after and before the merger there are no benefits. It's pretty much the same for me, it's just a different look and feel—maybe the fact that we have more user control now than in the past" (Appendix C).

Finding 51: Benefits identified are usability, scalability, enabling the business to facilitate workforce management, managing human resources and talent management, one central system, data-enabling decision making, automation of HR processes, one version of the truth, more user control than before the merger, and an increase in cost effectiveness

IQ 2.2.3: *Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?*

According to Six participants (P1, P4, P7, P13, P14), there is an indication of guidelines and a framework in place for effective integration and maintenance of the HRIS. P14 commented as follows: "We do have an integration and maintenance plan. We do server maintenance on a monthly basis and database management is done on a weekly basis" (Appendix C). P13 said,

> "From an HR perspective, because our process runs on a daily basis and depending on what type of process you're looking at—monthly, weekly, daily process that's running, so we would just make sure that those processes are running so that every transaction that gets captured will be there" (Appendix C).

Although P7 agreed that there is a maintenance plan in place, the respondent added that,

> "We don't have a policy to talk about the integrations and the acquisitions that we've done and the merger that we've done you actually have to determine what is your project plan and what is your approach because it greatly depends on how mature the services are that is used on the other HRIS, what process is being implemented, how much data it is that you need to convert, the complexity of the data and whether we can actually make provision for the data on the system" (Appendix C).

P2 ,P6 and P11 indicated that they are not sure if there is any form of policy, guideline or framework in place. P11 said, "I think there would be, I don't think its public knowledge, If it is, it would probably be in the IT space" (Appendix C).

Finding 52: There are policies in place for maintenance but no guidelines or framework for effective integration

IQ 2.2.4: *Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?*

All eight participants indicated that they are satisfied with the HRIS.

P11 responded:

> "Again, I think in my view Oracle PeopleSoft is not a bad system. I think a little bit of enhancements on certain processes and ensuring we are using the system to its full capacity is important". P6 said: "I would say that I'm satisfied. I don't really have anything else to compare it to, I haven't used another system so I can't compare it" (Appendix C).

P7 said,

> "What we're paying for our HRIS compared to what you would be paying to get another system is chalk and cheese. From a transactional perspective, it delivers on business requirements. Although, over time you're going to say that you probably have PeopleSoft as a transactional system and you've got all the different applications that you use and integrate with that, that actually talks to the requirements of a specific HR practice" (Appendix C).

P14 although generally satisfied added that some improvements can be made by saying: "I think the user interface could be more intuitive, better integration between other systems and real-time reporting" (Appendix C).

Finding 53: Improvements and enhancements can be made to the user interface and certain processes to increase user satisfaction

Finding 54: From a transactional perspective, PeopleSoft delivers on business requirements but in the future, the business will start integrating more advanced systems for other functionalities

Finding 55: To improve employee satisfaction, the system could be more intuitive and better integration between other systems and real-time reporting

IQ 2.2.5: *What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?*

All eight of company A's participants commented on some of the future expectations as follows:

P1 debated that automation will be needed in the near future: "Automation of more HR processes, improving the e-Learning module and potentially the integration of other systems" (Appendix C). Workflow and control will increase according to P2, who stated: "To push information and workflow right to the front and to allow the employee and line managers to be as much in control as possible" (Appendix C). P4 mentioned artificial intelligence as a role player to increase process efficiencies. P4 said: "…adopting the new capabilities and technologies like artificial intelligence and ensuring process efficiencies are in place" (Appendix C).

P6 commented on training: "To make it more stable, to provide better training on how to use the system and inform different types of functions and access levels around their capabilities on the system" (Appendix C). P7 opined that business integration and systems will still happen in the future: "There's lots of line of business systems where we are still busy integrating with PeopleSoft for example, employees still have access to certain systems after being terminated from the group" (Appendix C). P11 added: "Always ensuring the system is aligned to business requirements. I think we can also utilise more modules which are not being used on the system and eliminate all manual process, everything should be standardised and automated across the business" (Appendix C). P13 saw new requirements in the future that will place new demands on the systems. P13 said: "There could be new requirements going forward. I don't think that there is anything in the future that we haven't catered for unless something comes up—maybe the government sends out a new policy that we have to adjust to" (Appendix C). P14 opined that integration will be important in any business future. The HRIS is expected to integrate with other HR systems for one central input and maintenance of data to transfer to all systems being used in the business.

Finding 56: Future expectations identified by participants include: automation and integration; improving e-Learning module; allowing employees and management as much control of the system as possible; adopting new capabilities and technologies, i.e., artificial intelligence; ensuring that process efficiencies are in place; making the system more stable; providing better training; providing information on different access level capabilities; integration of line of business systems with PeopleSoft; and data to transfer to all systems being used in the business

IQ 2.2.6: *What can assist you to overcome the integration challenges you are currently facing?*

The following challenges were mentioned by the participants of Company A: i) accessing accurate information; ii) good change management; iii) top management buy-in; iv) training and user support on PeopleSoft; v) integration of systems; vi) access to specific domains; and vii) stakeholder and system coordination.

P1 indicated that "the only challenge I'm facing is accessing accurate information—the information is only accurate when the right information is being captured on the system. We can definitely put in more restrictive fields when capturing information" (Appendix C). M&A can lead to an exciting, yet tense time for a company. A change management plan assists the organisation with staying focused on top priorities, according to P2, who emphasised that "good change management should be in place; we are busy with another merger and that stays as upper most important" (Appendix C).

P4 was of the opinion that management buy-in is key to gaining cooperation and participation in the business and stated that "when business requires something that may be from top down, they need to push that because if you try to do it from the bottom up then it kind of makes it difficult. So, get the buy-in from the guy on top" (Appendix C).

Companies need to invest in their training. M&A presents opportunities to show employees that their development matters. P6 highlighted that "training and to provide better support to users on PeopleSoft can assist to overcome integration challenges" (Appendix C).

Integration with older systems is not that easy, as P7 noted:

> "We are sitting in a position where we can integrate in a world class format and design to any system and service across the business but there's lots of outdated technology and systems which doesn't always allow you integrate in that specific way so that's a challenge in itself because we've got legacy systems" (Appendix C).

P13 said that because of the merger, users had different domains, and "when people are on different domains then it's hard for them to get onto the HR system because they obviously have to bypass certain servers and URL's and stuff like that. I definitely think by identifying the access to the HR system would be something that will help the business to avoid those challenges" (Appendix C). P14 said: "API access of the systems, coordination between the stakeholders of the systems within the business" (Appendix C).

Finding 57: Adding more restrictive fields when capturing information to enable accurate data

Finding 58: Having a proper change management plan will allow the business to focus on priorities

Finding 59: Training and support will help overcome integration challenges

Finding 60: Having API access across systems will allow for the coordination between various systems used within the business

Finding 61: Users have different domains because of the merger, and this has an impact on access to PeopleSoft

IQ 2.2.7: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?

Participants of Company A commented on what can help the organisation overcome the merger-related impact on HRIS integration processes as a lesson for the future (Appendix C). What is needed: i) planning before implementation and integration; ii) HR's involvement in merger discussions from the beginning; iii) It's involvement with the merger from beginning; iv) data management; v) company process identification; vi) transparency and effective communication; vii) documentation of the project; viii) and post project reviews.

Finding 62: Plan before integrating and implementing systems within the business

Finding 63: IT to be part of merger-related discussions from the start

Finding 64: HR/IT communication needs to happen early, not when the merger-related discussion is done

Finding 65: Consider benefit alignment upfront

Finding 66: Identifying commonalities in data and the approaches to sharing data to reduce errors, standardising data across the business

Finding 67: Understanding the various systems used within the business and how each system integrates with another

Finding 68: Having a post-project review in place

Finding 69: Ensure transparency and effective communication

Finding 70: Come to a consensus for one process across the business

Finding 71: Keep any merger-related data for future anomalies

Finding 72: Prepare the system for anomalies and components that the merging company has and the current company does not have

IQ 2.2.8: *What structures or processes should have been put in place to ensure a streamline integration process during the M&A?*

The structures or processes that should have been put in place to streamline integration during the M&A were.

According to P6:

> "Change management plan, better communication, transparency, providing more support to staff for example counselling—there wasn't a lot of that happening. There wasn't any visible support, because the merger started to have an impact on people's lives, their mental health, finances, their job security. I also feel like HR was thrown into the business side of the merger to try and get it done as soon as possible instead of providing support for the users/employees. There was also a break in the relationship up until today with employees and HR as well. So maybe bringing in more organisational psychologists. There is a lack of trust now" (Appendix C).

P7 added: "The one thing if I could change is we actually should have done benefit alignment upfront—medical aid and pension fund etc. If you had done that upfront it would have made the whole exercise easier for your integration" (Appendix C).

P13 said,

> "From a practice perspective each business had their own practices and once the merger happened the business now needed to create one process. There should also be effective communication to the employee. There should be lots of openness and fairness in the merging process" (Appendix C).

P14 further indicated: "More time to get the HR department prepared in terms of ensuring the system is able to accommodate payment structures as well as change management" (Appendix C).

Finding 73: Having a solid change management plan in place, communication and transparency

Finding 74: Providing support to staff in terms of counselling

Finding 75: Doing benefit alignment of medical aid and pension fund upfront

Finding 76: Establish one business process/practice from the start

Finding 77: Ensuring the system is able to accommodate payment structures

4.5.2 Company B

The seven participants that were interviewed in Company B are P3, P5, P8, P9, P10, P12 and P15.

4.5.2.1 Research question 1

RQ1: **What are the reasons for ineffective HRIS implementation in organisations during M&A?**

RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?

IQ 1.1.1: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?

All participants in Company B (P3, P5, P8, P9, P10, P12, P15) confirmed that the organisation makes use of an HRIS called PeopleSoft. P8 said: "We used Oracle PeopleSoft as our central HRIS system" (Appendix C). P5 added: "We used E-business Suite prior to the merger" (Appendix C).

Finding 78: PeopleSoft is used as the HRIS and post-merger EBS was utilised prior to the merger

Q 1.1.2: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?

Two of the participants, P8 and P15, stated that not all employees have access to Oracle PeopleSoft.

P8 said,
> "No not all employees have access to PeopleSoft. Certain contractors and labour brokers won't have access to the system. However, the access varies across levels within the business. For example, Employee Self-Service, Manager Self-Service, super user access for HR. The access also varies in terms of your role within the business" (Appendix C).

P15 added:
> "All employees that are paid through our payroll have access to PeopleSoft. The level of access would then be dependent on your role within the organisation except for independent contractors, these employees does not have access to the system" (Appendix C).

Four of the seven participants (P3, P5, P9, P10) indicated that all employees have access to Oracle PeopleSoft. P5 added that access is dependent on the usage of the system (Appendix C). P12 indicated that, "I'm not sure but I think everyone has access depending on how you use the system" (Appendix C).

Finding 79: Not all employees has access to the HRIS

Finding 80: Access to the HRIS is dependent on the job function and the usage of the system

Finding 81: There is uncertainty about the access of employees to the HRIS system

IQ 1.1.3: *Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?*

Six participants (P5, P8, P9, P10, P12, P15) advised that training is being conducted.

P15 noted that adequate training is provided to all employees pertaining to the use of the system and also when there are new functionalities on the system. P9 added: "There is no training specific to the system that is provided at a group level. However, each department is responsible to have this training form part of their onboarding and induction process" (Appendix C). P3 indicated that "we don't have a formal training programme. We have developed the system to be very intuitive over the years so that little to no training is needed" (Appendix C).

Finding 82: There is no formal training programme in place

Q 1.1.4: *Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g., software against computer hacking and anti-virus)*

All participants (P3, P5, P8, P9, P10, P12, P15) indicated that there is effective information security in place. According to P8, "PeopleSoft has its own security model… there are also various firewalls in place as well to restrict access" (Appendix C). P3 added that all information stored on the HRIS is safeguarded: "We have an in-house PeopleSoft team that will conduct testing etc. to prevent any hacking. The data is housed behind firewalls, and we have various controls in place to safeguard the information" (Appendix C).

Finding 83: There is information security in place to safeguard Oracle PeopleSoft

Q 1.1.5: *Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A?*

The critical factors identified are:

i) *Leadership:* Most of the participants (7 out 8) stated that leadership is a critical factor experienced throughout the integration process of the HRIS during the M&A. According to P3, "leadership is important in terms of ensuring that the entire merger and

acquisition runs smoothly" (Appendix C). However, P6 added that "...from a leadership perspective there was not proper information being shared" (Appendix C).

ii) *Software and development:* Participants P3, P8, P9, P12 and P15 argued that software and development is a critical factor in the implementation process (Appendix C). P3 said that "it is important to have a strategy in place to mitigate any risks" (Appendix C). However, P12 stated that "each business had different access to PeopleSoft and used the system differently. We did not have much exposure to the system at that time so when the merger happened, we were expected to know how the system operates" (Appendix C).

iii) *Communication:* Seven participants (P3, P5, P8, P9, P10, P12, P15) agreed that there was a lack of communication and that it is a critical process during the integration process. P5 said: "There was a lack of transparency in terms of communication" (Appendix C). P8 added that "during the merger and even after the merger we experienced that it was harder to communicate and coordinate as a unified business" (Appendix C). P12 said that "communication was horrible during the M&A, leadership has a challenge when it comes to communication—they sort of keep the information and then share the information when they feel it is the right time but at the same time it is important to be transparent from the beginning so that it makes the whole process easier and people know what is coming and are better prepared for it" (Appendix C).

iv) *Change management:* Five participants (P3, P8, P9, P12, P15) identified change management as a critical factor. P3 noted: "Change management is probably one of the most important regarding having a plan in place for all the changes, from communicating to the business, ensuring roles and responsibilities are assigned, identifying relevant stakeholders, etc." (Appendix C).

v) *Culture:* All the participants (P3, P5, P8, P9, P10, P12, P15) indicated that the culture was negatively impacted. P12 said: "There was a culture shock, and when we merged, we sort of felt that we were stepchildren" (Appendix C). P8 added: "Our companies had very different cultures and this resulted in a gap in communication and affected the performance of employees (Appendix C). P10 noted that "over the years there has been a lot of emphasis on culture and communication. There has been a lot of drive on getting a unanimous culture—creating a common culture" (Appendix C).

vi) *Employee turnover:* Six participants (P3, P5, P8, P9, P12, P15) stated that employee turnover was affected. P12 noted: "Employee turnover was high because of the uncertainty, employees did not know if they would be affected or not. People started looking for new jobs" (Appendix C). P3 said: "Employee turnover was also impacted where some jobs became redundant" (Appendix C). P5 added that "you had a lot of

individuals leaving the organisation, I guess that the reason why they've also left was because of the lack of transparency in terms of communication" (Appendix C).

vii) *Job satisfaction:* Five participants (P3, P8, P9, P12, P15) argued that job satisfaction was negatively impacted. P3 as an example said: "Job satisfaction is important because this impacts [on] things such as performance, a merger would in some cases rock existing culture and norms, working conditions and morale. So, I believe that it was affected in terms of uncertainty, changes in management as well as the fear of downsizing and potential losing jobs" (Appendix C).

viii) *Other factors:* There were no other factors mentioned.

Finding 84: There was no quality information being shared by leadership

Finding 85: There was a lack of a software and development

Finding 86: There was a lack of quality communication during the merger

Finding 87: There was a lack of a good change management strategy

Finding 88: Differences in culture resulted in a gap in communication and affected the performance of employees

Finding 89: Employee turnover was high because of the uncertainty

Finding 90: Job satisfaction was affected in terms of uncertainty, changes in management and the fear of downsizing and potential job losses

Finding 91: Unfamiliarity regarding the system itself caused much frustration and conflict

IQ 1.1.6: *Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?*

Two of the seven participants (P3, P10) opined that the size of the organisation and its operations does not impact the effectiveness of the HRIS. P3 said: "In my opinion, I do not feel that size matters. If you get the basics right in terms of business requirements and the system can provide this then you are able to deliver what the business needs" (Appendix C). P10 also said: "No, I don't think the size of the business determines the effectiveness of a system— streamlining processes and having accurate data readily available is what makes a system effective" (Appendix C).

Five participants (P5, P8, P9, P12, P15) indicated that the size of the organisation and its operations does impact the effectiveness of the HRIS. P5 emphasised that "with the organisation merging it obviously expanded in terms of head count etc. and to create some structure and to easily … make data-driven decisions by just referring to the system to extract

that information … it has made like a huge impact in terms of operations" (Appendix C). P8 mentioned that,

> "Organisations should constantly measure and examine the cost and benefits and how the system of choice will provide positive returns because the business will always be growing and will need to keep up with the latest tech trends. In my opinion, I feel that a good information system is a relevant component of the current business environment. Also, PeopleSoft reduces geographical gaps within the business, and it is effective for the business but there are lots of things we can still improve" (Appendix C).

P9 indicated that the size of the operation definitely plays a role. Understanding impact, adoption and change management is key to implementing an HRIS. Having key stakeholders onboard and having them aware of such implementation is extremely important. P12 stated: "If the business is bigger, you need to find effective ways on how you manage information, how you recruit, how to retain employees. So, you would need a system that will be very efficient and convenient" (Appendix C). P15 concluded by saying that "it does determine the effectiveness of the HRIS because in my view there would be more users on the system. The business would need to streamline more HR processes for employees to be able to access various information [sic]" (Appendix C).

Finding 92: The size of the business can impact the effectiveness of the system in terms of how the business manages operations

Finding 93: The HR processes are not streamlined

IQ 1.1.7: Are there effective teamwork and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? If no, why not?

Some participants (P3, P9, P10, P15) indicated that there were sufficient teamwork and staff participation in the organisation to support the implementation process of the HRIS, while three participants (P5, P8, P12) stated the contrary. P9 indicated: "This varies from Business Unit to Business Unit. I will however say that our organisation is driven by several values, one being teamwork" (Appendix C). P10 argued that "there has always been sufficient support and we have a help desk that assists with any queries" (Appendix C). P15 said that the "HRIS works integrated with staff participation which supported the implementation process. For our organisation, collaboration is extremely important across teams and allows for flexibility of working on various systems and projects across business" (Appendix C).

P5 said: "Holistically no, but if I have to single out an organisation in this case Company A – I'd say yes there were things in place to make sure things were supported in terms of the

implementation process from the system" (Appendix C). P8 stated: "I don't think there was effective teamwork and participation. After the merger we did not receive proper training on how to use the system. We were just expected to read a manual without any assistance or guidance" (Appendix C).

Finding 94: Teamwork and staff participation differed from business unit to business unit

Finding 95: Holistically, there was not enough support and teamwork in terms of the implementation process of the HRIS

Finding 96: There was no proper training on how to use the system

IQ 1.1.8: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?

Five participants (P3, P5, P9, P10, P15) rated management satisfaction as medium. According to P5, "medium considering everyone has not yet been fully exposed to the system, so managers only use certain functionalities. If managers get more exposure in terms of what the system can enable them to do then I guess it will probably be ranked from medium to high" (Appendix C). P15 said that "it would depend on what area of the business these managers are located. I do not think that all managers are aware of the functionality on the system" (Appendix C).

P8 and P12 rated management satisfaction as low. P8 indicated: "I don't think managers receive sufficient training around new processes on the system or understands the various functionalities that are available as a manager" (Appendix C). P12 is of the opinion that it depends on the department. P12 said: "The majority of managers don't use the full functionality of the HRIS system and there are problems as well" (Appendix C).

Finding 97: Managers are only exposed to certain functionalities on the system

Finding 98: Managers does not receive sufficient training around new processes on the system

Finding 99: Management trust levels are on a medium scale for the HRIS system

IQ 1.1.9: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?

P3, P5, P9 and P12 indicated that a new culture did not present itself after the merger. P3 mentioned: "I don't think that a new culture emerged immediately, there were still two separate

cultures, and we are trying to create a unified culture with some aspects of each" (Appendix C). P5 said that "after the merger like there were still what's commonly known as operating in silos so at this stage I can't really say if there is a new culture, so everyone is still like set in their ways" (Appendix C). P12 also added that it was more about informing the business of this new culture rather than living the culture and values (Appendix C).

P8, P10 and P15 indicated that a new culture did present itself after the merger. P8 mentioned: "I don't think a new culture presented itself immediately but over the past few years a new culture has emerged" (Appendix C). P15 said that "a new sense of culture has developed after the merger took place" (Appendix C). A more modern approach to business and operations began to develop within the organisation.

Finding 100: A new culture did not immediately emerge after the M&A

Finding 101: The business operates in silos after the merger

Finding 102: After the merger, a more modern approach to business was developed within the organisation

IQ 1.1.10: *What is your opinion of the new culture? If yes, why do you say so? If no, why not?*

The participants had various opinions. Although P3, P8, P10, P12 and P15 had a more positive outlook to the new culture that emerged, P3 said that "a completely new culture has not yet emerged. I feel like there are still certain silos of cultures scattered in the business" (Appendix C). P8 was of the opinion that "the new culture created more synergies and encouraged teamwork across the group. I think all employees are trying to adapt to the new culture which is a high-performance driven culture that is data driven and solutions focused" (Appendix C). However, P5 indicated that a new culture has not yet emerged (Appendix C) and P9 indicated that "when our organisation merged, the difficulty has been and still is integrating the culture of two very different organisations into one" (Appendix C).

Finding 103: There is a culture of silos scattered in the business

RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?

IQ 1.2.1: *What strategies should be put in place prior to M&A?*

All participants indicated numerous strategies that should be put in place prior to a merger.

P3 said that "HR and IT to be involved as soon as there are discussions around merging and creating a change management plan as well as an IT integration plan" (Appendix C). P5 said: "system integration part but I think a change management plan should definitely be devised, make sure that everyone is aligned to the new culture, at this date we will give everyone training" (Appendix C).

P8 stated that,

> "Successful integration is accomplished through different strategies. I think that you need to consider which system is optimal, communication is vital … planning because this should be done before any integration of any kind takes place. …there should be an effective change management plan in place, creating awareness and educating users on the new system, also creating e-learning or training manuals for the new system and I think, having a solid integration plan that… includes all parties involved and IT to make sure it goes smoothly. You also must determine which system you are going to keep, what data is important and how much integration is needed in terms of data etc. It is also crucial to understand the differences between the companies' IT maturity levels" (Appendix C).

P12 identified planning, transparency, and research as strategies and said: "Research is very important about how previously companies dealt with mergers and acquisition, identifying possible impacts etc." (Appendix C).

P15 said,

> "Getting IT and business on the same page early. Data is what drives decisions throughout the organisation so it would be important to identify commonalities and discrepancies with the data and then aligning to the current data set. I would also say there should be sufficient planning in place for the integration of the system, determine which system will be adopted and create a roadmap detailing who will be involved, which tasks need to be completed and outline a timeline for completion. Lastly I think that a communication plan to the business should also be created to outline various milestones" (Appendix C).

Finding 104: HR and IT should be involved as soon as there are discussions about merging

Finding 105: There is no change management and IT integration plan

Finding 106: Communication, planning, research and training are important strategies

Finding 107: There was a lack of a strategic consultancy process

Finding 108: There was no business-IT alignment strategy

IQ 1.2.2: What strategies should be put in place post-M&A?

Participants identified various factors that should be put in place post-merger. P3 mentioned: "Ensuring that all the boxes were ticked, all the employees are successfully integrated into the business" (Appendix C). P5 said: "Evaluation like strategies and rolling out initiatives to address the barriers that hinder us from achieving you know our ultimate vision and goal with the merger and also to prepare us for future mergers" (Appendix C).

P8 added that,

> "Post-acquisition integration is a complex and time-consuming process with numerous factors to consider—In my view I would first look at how mature the HR processes are and whether there is an effective HR strategy in place and then using the system to generate satisfaction among the business and also to create a shared vision among the employees. What is also important is to have support services available and to have a platform that encourages feedback for improvement on various processes on the system" (Appendix C).

P9 noted, "effective change management and constant communication as a strategy going forward. Take staff on this journey with you. Do not keep them hanging, guessing, and creating perceptions that are not there" (Appendix C). P10 proposed "continuous communication with the business" (Appendix C). P12 indicated change management, training and communication as very important for employees to be equipped with the knowledge to use systems. P12 also mentioned transparency as very important. P15 argued that success factors should be clearly defined, which will be a guide to all integration efforts.

Finding 109: Evaluation strategies and rolling out initiatives to address the barriers and to prepare for future mergers

Finding 110: Ensure there is a proper HR strategy in place

Finding 111: Use the system to generate satisfaction among the business and also to create a shared vision among the employees

Finding 112: Have support services in place and a platform that encourages feedback for improvement on various processes on the system

Finding 113: Effective change management, training, transparency and constant communication

Finding 114: Success factors should be clearly defined to guide integration efforts

IQ 1.2.3: *What HRIS system was used prior to the M&A?*

All participants indicated that Oracle PeopleSoft and Oracle E-business Suite was used.

Finding 115: Oracle PeopleSoft and Oracle E-business Suite was used

IQ 1.2.4: *Does the implementation of the HRIS assist your organisation to accomplish the following business processes listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?*

The strategies listed are: i) recruitment and selection; ii) training and development; iii) recognition and rewards; iv) payroll; v) onboarding new employees; vi) succession planning; vii) performance management and learning; viii) develop talent management; ix) off-boarding; x) employee benefits; xi) benefit administration; xii) position management; xiii) SLA tracking; xiv) reporting/analytics; xv) retrieval of any employee data; and xvi) BI for the data management.

Seven participants (P3, P5, P8, P9, P10, P12, P15) confirmed that the implementation of the HRIS assisted the organisation with achieving all listed strategies. P3 indicated: "Yes to all. The other strategies are onboarding, succession planning, performance management and learning and development" (Appendix C).

P5 said the following:

> "So, moving into an age where we need to be making data-driven decisions has assisted the organisation in making informed decisions and establish certain metrics to ensure that we can make decisions and spend money based on the data that we have at our disposal, so I think in that regard the HRIS has made things much more effective from an HR perspective and obviously if you get the basics right in terms of the metrics for HR process you can clearly see the impact that HR has in terms of the achievement for business objectives—so yes to all" (Appendix C).

Finding 116: The HRIS has made things more effective from an HR perspective

Finding 117: Fourteen additional business processes were identified

IQ 1.2.5: *How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?*

Six of the seven participants (P3, P5, P8, P9, P10, P15) indicated that the capturing, recording and retrieval of data is effective.

P3 said: "I would say that it could be more effective. We always face the risk of data being inputted incorrectly" (Appendix C). P8 added that "it depends on how the data were stored on the previous HRIS system, if it was captured incorrectly the transference of this data would be incorrect however overall, the capturing is effective. There are checks in place to ensure data is captured correctly" (Appendix C).

P12 held that,

> "It's not that effective because not everyone is doing it. If everyone is using it then it's easier and effective. If some people are not using the system as intended, then it's not effective. For example, when you capture you need to capture everything on the document and then if only two people capture that information, then it won't be effective because the data that you retrieve from the system is not accurate. I think it's not user friendly to be honest. There are a lot of things, there are naming convention issues, you have to save it in multiple places" (Appendix C).

Finding 118: There is a risk of data being captured incorrectly

Finding 119: Different processes are being followed by employees when capturing data

IQ 1.2.6: *Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?*

Most participants (P3, P5, P8, P9, P10, P15) indicated that that HRIS does provide confidentiality, privacy and security of the personal information of the employees. P9 was of the opinion that the HRIS provides confidentiality, privacy and security of the personnel information of the employees.

P9 stated:

> "Specific levels of access are driven by the users' extent to which their role requires them to have access to confidential and private information. Logging onto the system requires a username and password and linked to my employee number allows the system to confirm the level of my access on the backend" (Appendix C).

P15 indicated that "PeopleSoft has various levels of access, and the data is also stored in a SQL database which makes it harder to get access to the data unless you have direct access to the database, but I do think that the security around access to the database is very strict" (Appendix C).

P12 disagreed and said that,

> "The thing with the system or any other system is dependent on an individual to physically scan in a document and take it and shred it. I think that the confidentiality and privacy is already compromised so now I really can't say that there was confidentiality provided by PeopleSoft; it was more of confidentiality of the people who were working on the system during the merger and not everyone has the same access on PeopleSoft" (Appendix C).

P5 also stated that,

"PeopleSoft won't tell you that you are not allowed to share this information. What we normally do from an HR perspective is that we make individuals that utilises the system and that may accidentally be exposed to confidential information we have them sign what's called a confidentiality agreement so anyone that is exposed to confidential information they will be faced with disciplinary action. So yes, there are different levels of access per user and each user has their own secured username and password" (Appendix C).

Finding 120: The users of the system sign a confidentiality agreement to protect the data on the system

Finding 121: Confidentiality is provided by the system in terms of access, but privacy can be compromised around the manual aspect

4.5.2.2 Research question 2

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?

IQ 2.1.1: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration, i.e., retirement, medical aid, recruitment and selection, performance, employee self-service, analytics. What other modules does the HRIS have?

All participants indicated that the following modules identified are implemented in the organisation: Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, and analytics.

Other modules identified include:
i) Manager self-service; ii) e-learning; iii) workforce planning; iv) case management; v) position management; vi) PeopleConnect (hierarchy structures and organograms); and vii) manager self-service.

P3 noted: "All of the modules except time management. The analytics module is not within PeopleSoft itself, but we use a plug-in called Qlikview for data visualisation and reporting purposes". P9 said: "So yes to all besides time management. The other modules include PeopleTrax which is a case management system; position management and PeopleConnect which is a layout of all hierarchical structures and an employee directory as well as an e-Learning module" (Appendix C).

Finding 122: All modules are being utilised on the system except for time management

IQ 2.1.2: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?

P3, P5, P8, P9 and P10 indicated that the current modules suit the business needs. P9 said: "The system houses quite a number of modules. I do think that there is room for some system enhancements or improvements that can allow for much better flow and consistency" (Appendix C). However, P12 and P15 did not agree with this stance.

P12 said:

> "Not for the learning and development department. I mean learning and development requires much more up to date systems. It might have worked for the business before the merger but not much change has been implemented to keep up with industry norms" (Appendix C).

P15 further argued that the current HRIS modules do not suit the business:

> "I'm sure we can explore more functionalities on the system as well or streamline more HR processes. If I look at the recruitment ATSs that are currently available our recruitment functionality just does not compare. There have been some upgrades around the recruitment module on PeopleSoft but there is so much more that can be done" (Appendix C).

Finding 123: The modules suit the business because it is customisable and affordable

Finding 124: The system can be enhanced and improved to allow for better flow and consistency

Finding 125: The e-Learning functionality does not align with industry requirements

IQ 2.1.3: Which of the HRIS modules are frequently used by your organisation?

All participants indicated that all the modules are frequently used. P3 added: "Other modules are used when the need arises for example performance reviews will be used once a year" (Appendix C). P15 said: "Some modules are used more frequently than others such as Recruitment and Payroll" (Appendix C).

Finding 126: All the modules on the system are being used by the organisation but some are used more often than others

IQ 2.1.4: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not?

P3, P5, P8, P10, P12 and P15 indicated that the HRIS is upgraded in terms of software and development. P3 said that they "upgrade as often as possible and when business requires. Our in-house PeopleSoft team always ensures that the system is where it needs to be" (Appendix C). P15 also said: "we do but I don't think we upgrade often as it is a very time-consuming process and I would assume costly too" (Appendix C). P9 said, "I'm not sure" (Appendix C).

Finding 127: The HRIS is upgraded as often as possible to align with business requirements, but it is costly

IQ 2.1.5: *How would you rate the contribution of HRIS to the continuity and success of your organisation?*

Participants P3, P10 and P15 rated the contribution of PeopleSoft to continuity and success of the organisation as high. P10 mentioned that "it is an important tool, you know all your employee information is hosted on the system, the system is used to pay employees, it used for people to apply for jobs, to track performance so it's very effective in terms of the employee life-cycle" (Appendix C). P15 also indicated that after certain processes were automated, "the user interface was upgraded, and the mobile app was introduced—this increased the usage of the system. HRIS is also a very valuable system within an organisation as it helps administer the organisation" (Appendix C).

P5, P8, P9 and P12 rated the contribution of PeopleSoft to continuity and success of the organisation as medium. P5 pointed out that "it is currently addressing the different needs that we have within the organisation from a systems point of view but as technology improves and we are faced with more complex business issues uhm it will require more updates in terms of robotics, AI etc." (Appendix C). P8 said: "high because PeopleSoft contributes to crucial functions of the business" (Appendix C).

P12 highlighted that,

> "Systems are supposed to make your life easier but it makes it more hectic. It adds additional work, so I believe that you can't really give credit to PeopleSoft for the continuity and success to the organisation. The data that PeopleSoft presents is so inaccurate—how are you going to continue and be successful" (Appendix C).

Finding 128: The system is crucial for the employee life cycle and addresses business needs

IQ 2.1.6: *How would you rate management satisfaction with the HRIS?*

P3 rated management satisfaction as high because "the system is designed to do what it needs to do. I'm sure there are a handful of managers that don't really take the time to understand the full functionality of the system but those who do can understand like I said previously that the system is very intuitive" (Appendix C). P5, P8, P9, P10 and P15 rated management satisfaction as medium. P8 said that "when new processes are introduced to the business, I think managers should at least be trained" (Appendix C). P10 added that "management is sometimes reluctant to the changes being implemented on the system. I think it's a mindset story, they need to embrace the change" (Appendix C). P12 rated management satisfaction as low because the HRIS is never simple.

Finding 129: Management satisfaction is seen as medium in nature

IQ 2.1.7: How would you rate staff satisfaction with the HRIS?

P3 and P10 believed staff satisfaction is high. P3 noted,

> "A few years ago, people were not very keen on using the system because it was very complicated, so we have designed the system to be so user friendly that no training is required. We have created a mobile version so that employees can access payslips and apply for leave on the go and I think that this was when lots of employees started using the system on a regular basis" (Appendix C).

P10 added that "staff in general are happy so I'd say high—the system is being used often and the mobile app is very useful" (Appendix C). P5, P8, P9 and P15 rated staff satisfaction as medium. P5 said: "medium because obviously it allows for them to do basic ESS tasks such as checking payslips, applying for leave etc. [The system allows them] visibility and quickly provides the information that they need". (Appendix C). P8 indicated that "there is always room for improvement, but I think over the years employees are realising the value of the system" (Appendix C). P15 said: "I think that staff satisfaction definitely plummeted after the introduction of the mobile app. The system became more user friendly and employees became more familiar with its functionality" (Appendix C). P12 rated staff satisfaction as low and said that "employees don't like PeopleSoft. I have never heard anyone saying I love PeopleSoft" (Appendix C).

Finding 130: The employees are satisfied with the HRIS

RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?

IQ 2.2.1: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?

P3, P5, P8, P9, P10 and P15 agreed that the HRIS was able to contribute to the efficiency and effectiveness of departmental activities during the M&A. P8 said: "It helped me perform most of my day-to-day duties, this frees up a lot of the time spent on admin and creates time for one to focus on strategy and implementation of new ideas" (Appendix C). P15 added that everything was operating normally. However, P12 did not agree and said that "we hardly used the system" (Appendix C).

Finding 131: The HRIS was able to the efficiently and effectively contribute to departmental activities during the M&A

IQ 2.2.2: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?

All the participants identified the following benefits gained from using PeopleSoft:

i) *Employee engagement:* P3—"The HRIS enhanced employee engagement because employees now had the opportunity and information at their fingertips instead of going through various channels to get the information that they needed. The system also provided accurate data which assisted the organisation to make informed business decisions, being able to keep data in one place, reducing human error and just streamlining all HR processes to make work quick and simple" (Appendix C).

ii) Consolidated view: P5—"The ability to have a consolidated view, having the ability to use information to make decisions more swiftly and most importantly making sure that hosting accurate information of all employees in a secured manner. There is one point of reference and not like going to various systems or consulting different data sets, so decision making is obviously more much swifter and making sure the decisions made were based on information or rather accurate data that you had at your disposal" (Appendix C).

iii) *Mobile solution:* P8—"the mobile self-service option has created a high employment engagement and sense of empowerment. Employees no longer need to depend on HR to retrieve payslips etc. which also frees up lots of time for HR, I think that collaboration between different business units has improved. We only have one true source of data to help with analytics and reporting so that the organisation can make informed data-driven decisions. Lastly, another benefit would be easy access to information, speed of data retrieval and the automation of recurring tasks" (Appendix C).

iv) *One platform:* P9—"One platform, one reporting tool and one integrated system whereby all information is housed and can be accessed" (Appendix C).

v) *Knowledge transfer, streamlining and automating processes:* P10—"Knowledge transfer, streamlining and automating processes, adapting more agile operations and capabilities" (Appendix C).

vi) *Recruitment and selection:* P12—"I guess recruitment and selection wasn't done the same way prior to the merger. It was more manual" (Appendix C).

vii) *Employee self-service:* P15—"Employee self-service definitely improves employee empowerment and engagement, data analytics assists the organisation to make more informed decisions, assists with quickly recruiting new employees, reduces paperwork, helps the organisation to keep up with any compliance regulations and it improves operational efficiency as it simplifies how the business tracks, updates and reports on employee data" (Appendix C).

Finding 132: The benefits identified are consolidated view, mobile solution, one platform, knowledge transfer, streamlining, automating processes, recruitment and selection, and employee self-service

IQ 2.2.3: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?

P15 said: "The Company does have a framework for integration and maintenance. I don't know what it's called" (Appendix C). P8 mentioned that "I don't think that there is an official policy or guideline in place but there was probably a framework or SOP developed at the project planning stage" (Appendix C).

P3 and P5 indicated that there are no guidelines and a framework in place for effective integration and maintenance of the HRIS. P5 said: "It's not really a framework it's more like a Standard Operating Procedure" (Appendix C).

P9, P10 and P12 indicated that they did not know whether there are guidelines and a framework in place for effective integration and maintenance of the HRIS. P12 noted: "I wouldn't know because maintenance is not part of my department. I have never seen it, because all policies/manuals are available on the intranet" (Appendix C).

Finding 133: There is uncertainty of the guidelines and frameworks in place in the organisation in terms of the name and where it is housed

IQ 2.2.4: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?

The majority of the participants (P3, P5, P8, P9, P10, P15) indicated that they are satisfied with the HRIS. P3 responded by saying: "The system is built around what the business needs at a given moment in time but there are lots of improvements to be made to have a more streamlined system" (Appendix C).

P8 said,

> "I think there are better and more advanced systems than PeopleSoft. However, PeopleSoft can take care of all HR processes and unify employee data in a single system. Over the years we've made it more user friendly for employees to update and access personal information. We've plugged in analytics programs such as Qlikview for our reporting and we continue to update the system as per business needs but the reporting functionality on the system itself is not amazing" (Appendix C).

P9 added: "I do not think an alternate system is required around performance. I do think that they simply need to 'uncomplicate' a simple system so that it is more user-friendly and not complex and burdensome to use". P15 also said: "PeopleSoft provides the tools for customising and automating processes to match existing business processes. However, certain processes such as Performance Excellence can be improved" (Appendix C).

However, P12 did not agree and said that,

> "I think the business needs to move with the times and maybe understand their business needs you know. I love PeopleSoft when I'm using it for University because its user friendly, it's nice to work with, I know where to get my results and I never have any issues with it. I have used PeopleSoft before at university but then when I moved here I was like—PeopleSoft is not this complicated. I think maybe they need to find a system that actually works well for this specific business to manage the number of employees. I would recommend the business uses a different system" (Appendix C).

Finding 134: The majority of participants are satisfied with the HRIS

Finding 135: The HRIS is seen as a complicated and complex system

IQ 2.2.5: *What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?*

All seven participants commented on some of the future expectation as follows:

i) *New technologies and APIs:* P3—"Adopting new technologies, creating APIs to different systems to enhance our current HRIS system. I think also potentially looking at artificial intelligence and ensuring all processes are efficient and effective" (Appendix C).

ii) *Business process management improvements:* P5—"I would say just improving on the basic processes and making sure that it is effective and efficient for the end user and also possibly implementing robotics and artificial intelligence as well. I think just having the system fulfil the business needs as effectively and efficiently as possible also ensures that any future integration is streamlined" (Appendix C).

iii) *System integration:* P8—"We would like to link the system to various other systems and have one true system with all the other great functionalities" (Appendix C).

iv) *Digitisation and simplification:* P9—"Continuous digitisation and simplification. Having the system available via your mobile phone and accessible at the click of a button" (Appendix C).

v) *Artificial Intelligence:* P10—"I guess implementing more processes around AI. Enhancing the employee experience on the system, reducing the number of clicks" (Appendix C).

vi) *Change management:* P12—"The people that manage the business are very scared of change" (Appendix C).

vii) *Recruitment tracking:* P15—"Probably integrating PeopleSoft with various systems such as an applicant tracking system for recruitment and also streamlining our current processes" (Appendix C).

Finding 136: The future expectations are: new technologies and APIs, business process management improvements, system integration, digitisation and simplification, AI, change management and recruitment tracking

IQ 2.2.6: What can assist you to overcome the integration challenges you are currently facing?

All 7 participants commented on challenges that are currently being experienced:

i) *Management of changes:* P3—"Change adoption, something that is not often spoken about. It is how you can change working in the organisation and how you get a better technology adoption. There are a lot of fancy HR technologies, but people do not use half the functionality. If you look at your cell phone you only use 10% of the features on there and you got all these apps, you downloaded and you only use 5% of the apps. The trick is to have the apps that people use a lot and adopt that—all the other stuff will be in the periphery, and they will access it when they want to sort of thing. We invest in it; it costs money to do change management and to spend time to get people to adopt

something. The adoption cost is the IT cost and human cost in adopting an IT project" (Appendix C).

ii) *Planning and training:* P5—"Better planning and regular training on the utilisation of the system" (Appendix C).

iii) *System integration:* P8—"Understanding the other business systems used in the business and how we can integrate these systems. I think that we should also take the cloud environment into consideration. PeopleSoft has an API limitation, so it does not integrate to all new applications easily" (Appendix C).

iv) *Measurement:* P9—"Measuring what employees find complicated and identifying what small implementations can solve for a more successful HRIS" (Appendix C).

v) *Data integrity:* P10—"Probably data integrity, I think the individuals who are capturing should put checks and things in place" (Appendix C).

vi) *Management:* P12—"I think it's dependent on the executives, they need to see it from our perspective and try to walk in our shoes so that they can implement a better system or make it better. I'm afraid that it is dependent on management. I wish we had a better learning management system – where employees can go on the system and apply for a bursary and then have a requisition generated from that information—that is not there so it's all manual at this point—the only way that we could get that is for management to do something about it. PeopleSoft is very tedious, we need a system that is less tedious, too many clicks" (Appendix C).

vii) *Cloud computing:* P15—"I think the biggest issue that we're experiencing now is the failure to consider moving to the cloud. This will reduce any potential future integration and security risks" (Appendix C).

Finding 137: Change adoption, planning, training, data integrity, getting employee input into system decisions, improving learning and management system, system is tedious with too many clicks

IQ 2.2.7: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?

The seven participants commented on what can help the organisation overcome the merger-related impact on HRIS integration processes as a lesson for the future:

i) *Change and adoption:* P3—"Change and adoption, spending some money on change management which will drive better adoption" (Appendix C).

ii) *Processes and systems:* P5—"Adapt processes and systems to fit current and future needs of the organisation and reducing duplication of workflows as well as vendors" (Appendix C).

iii) *System communication:* P8—"Understanding how different systems within the organisation are able to communicate with each other. To successfully integrate a system there needs to be constant communication Standardise data between businesses i.e., employee codes, positions" (Appendix C).

iv) *Communication:* P9—"Keep staff at the forefront of everything you do and implement. They are ultimately responsible for ensuring they keep the ship moving. So, help staff to help themselves easily access information and navigate a system to better carry out their jobs. Communicate the change more and get input from the start" (Appendix C).

v) *Transparency:* P10—"I think proper change management, communicating with the business and keeping employees informed, always being transparent" (Appendix C).

vi) *System choice:* P12—"I don't think the issues that employees or the business are experiencing now is related to the merger. I think it's related to the choice of the system" (Appendix C).

vii) *Holistic employee involvement:* P15—"Involving all relevant participants from the start of the project and essentially having a solid plan of action in place. Not rushing the process, be prepared for a culture shift and change" (Appendix C).

Finding 138: Change and adoption, processes and systems, system communication, communication, transparency, system choice, holistic employee involvement, and holistic employee involvement

IQ 2.2.8: *What structures or processes should have been put in place to ensure a streamline integration process during the M&A?*

The participants advised on the structures or processes that should have been put in place to streamline integration during the M&A:

i) *Collaboration:* P3—"We work much more collaboratively. We are part of the merger project team. HR is always the last to be involved, even with the payroll. Get your HR IT people in early on the merger team. So, three to four months before the merger actually happens. So, when day one comes we've done change adoption, they're on the system etc." (Appendix C).

ii) *Data management:* P3—"We've done data discrepancies, is another key thing you know—we have 5 levels in our structure, and you've got 10 levels in your structure,

what is a senior manager here, what's a transitional leadership role there, how do the two link job families, and can you build what you call a correlation table between what they have and what we have. Then you build a common language, a correlation language so our thing of senior manager equals your thing of this" (Appendix C).

iii) *Change management:* P5—"I think having a structured change management and system integration plan. Making sure there are processes in place and timelines that need to be abided by and not just free styling in terms of making sure people understands the system and utilise the system. So having a change agent that partners with business unit leaders and having everyone exposed to regular training and exposure to the system" (Appendix C).

iv) *Benefit alignment:* P8—"We should have done benefit alignment upfront—medical aid and pension fund so that all employees were on the same page, business decisions must be made on an understanding of a unified set of data that is accessible across the organisation. I think also just being transparent and communicating to all employees appropriately" (Appendix C).

v) *Outsourcing:* P9—"Outsource a company to assist in measuring employee opinions and views. Get buy in and budget to properly deliver on a quality service. Ensure proper due diligence is followed to determine any updates, data that are needed for a smooth transition" (Appendix C).

vi) *Integration and automation:* P10—"Identify integration and automation processes early on. Ensure that all systems and operations are fully integrated and functional in a timely manner" (Appendix C).

vii) *Training:* P12—"I think training if employees were trained before the merger. They were supposed to be trained in anticipation for the merger so if you're going to introduce recruitment and selection to these people who haven't used it, train employees on the system and process" (Appendix C).

viii) *Culture management:* P15—"Decide on IT for the integrated company early, rigorously manage cultural integration and change management and communicate—it's better to have too much communication than too little. I think it's also very important to capture all merger and acquisition lessons learned so that the business is prepared for any other potential mergers" (Appendix C).

Finding 139: The following structures and processes were identified: collaboration, data management, change management, benefit alignment, outsourcing, integration and automation, training, and culture management

A total of 139 findings were developed, 77 for Company A (Table 4.5; Appendix D) and 62 for Company B (Table 4.6; Appendix E).

Table 4.5: Extract of findings (77) for Company A (Appendix D)

RQ	RSQ	IQ	Finding No.	Finding
1	1.1	1.1.1	1	PeopleSoft was used as the HRIS in Company A
1	1.1	1.1.2	2	Not all employees of Company A had access to the Oracle PeopleSoft system
1		1.1.3	3	There was a lack of formal training in Company A
1	1.1	1.1.3	4	There is uncertainty around the type of training provided and a confidentiality agreement is signed before access is granted to sensitive information
1	1.1	1.1.3	5	The most intuitive systems can seem imposing when employees and managers are unfamiliar with the appearance, functions and processes of the system
1	1.1	1.1.3	6	Not all employees and managers are involved in the implementation and adoption of the system
1	1.1	1.1.4	7	There was information security in place to safeguard Oracle PeopleSoft at Company A
1	1.1	1.1.4	8	Access to the system was limited through a secure username and password
1	1.1	1.1.5	9	Leadership was identified as a critical factor
1	1.1	1.1.5	10	The lack of a software and development plan impacted on integration

IQ = Interview question; RQ= Research question; RSQ = Research sub-question

Table 4.6: Example of findings (62) for Company B (Appendix E)

RQ	RSQ	IQ	Finding No.	Funding
1	1.1	1.1.1	78	PeopleSoft is used as the HRIS and post-merger EBS was utilised prior to the merger
1	1.1	1.1.2	79	Not all employees has access to the HRIS
1	1.1	1.1.2	80	Access to the HRIS is dependent on the job function and the usage of the system
1	1.1	1.1.2	81	There is uncertainty about the access of employees to the HRIS system
1	1.1	1.1.3	82	There is no formal training programme in place
1	1.1	1.1.4	83	There is information security in place to safeguard Oracle PeopleSoft
1	1.1	1.1.5	84	There was no quality information being shared by leadership
1	1.1	1.1.5	85	There was a lack of a software and development
1	1.1	1.1.5	86	There was a lack of quality communication during the merger
1	1.1	1.1.5	87	There was a lack of a good change management strategy

IQ = Interview question; RQ= Research question; RSQ = Research sub-question

Table 4.7: Example of findings (139) for Company C (Appendix F)

RQ	RSQ	IQ	Finding No.	Finding
1	1.1	1.1.1	1, 78	PeopleSoft is used as the HRIS
1	1.1	1.1.2	2, 79, 80, 81	There is uncertainty about access to the system
1	1.1	1.1.3	3, 4, 5, 82	There is a lack of formal training
1	1.1	1.1.4	7, 8, 83	Information security is in place for HRIS
1	1.1	1.1.5	14, 89	Employee turnover was high because of the uncertainty
1	1.1	1.1.5	9, 84	Leadership communication a problem
1	1.1	1.1.5	12, 87	Lack of change management strategy
1	1.1	1.1.5	10, 85	The lack of a software and development plan impacted integration
1	1.1	1.1.5	13, 88	Cultural difference negatively impacted merger
1	1.1	1.1.5	11, 86	There was a lack of quality communication during the merger

IQ = Interview question; RQ= Research question; RSQ = Research sub-question

In the following section, the findings are used to develop themes for Company C.

4.6 Theme development

The themes were developed by combining the findings of Company A (77) and Company B (62). The themes were coded and re-coded, and then the categories (number) were developed.

Table 4.8 presents an example of development of categories (19) from the coded findings:

Table 4.8: Example of the development of categories (Appendix G)

Finding No.	Findings	Re-coded 1	Re-coded 2	Categories
73, 74, 75, 76, 77, 139	The following structures and processes were identified: collaboration, data management, change management, benefit alignment, outsourcing, integration and automation, training, and culture management	Business structure and processes	Business structure and processes	Business structure and processes
35, 36, 123, 124, 125	Some modules need to be modify to fulfil business needs	HRIS modification	Policies and guidelines	Business-IT alignment
108	There was no business-IT alignment strategy	Business /IT alignment	Business-IT alignment	Change management
12, 87	Lack of change management strategy	Change management	Change management	Communication
11.86	There was a lack of quality communication during the merger	Communication	Communication	Culture
13, 88	Cultural differences negatively impacted on the merger	Culture	Culture	Employee management
20, 21, 22, 100, 101, 102	An unified company culture was slow to develop, and this hampering the merger implementation	Culture	Employee satisfaction	Future expectation
23,103	There was a lack of culture and value alignment	Culture	Employee turnover	HR management

Finding No.	Findings	Re-coded 1	Re-coded 2	Categories
47, 48, 130	The employees are satisfied with the HRIS	Employee satisfaction	Future expectation	HR system
53,134	The majority of participants are satisfied with the HRIS	Employee satisfaction	HR	IT management

IQ = Interview question; RQ= Research question; RSQ = Research sub-question

From the categories (19), 10 themes were developed (Table 4.9).

Table 4.9: Theme developed from the categories and linked to the findings, IQs, RSQs and RQs

Finding Number	Theme	IQ	RSQ	RQ
62, 63, 64, 65, 66, 67, 68, 70, 71, 72, 108, 138, 73, 74, 75, 76, 77, 139	Business-IT alignment	1.2.1; 2.2.7; 2.2.8	1.2; 2.2	1; 2
26, 109, 110, 111, 112. 100, 25, 104, 105, 107, 37, 126, 44, 45, 46, 129, 32, 122, 33, 34, 35, 36, 123,124, 125, 32, 122, 33, 34, 35, 36, 123, 124, 125, 37, 126 , 41, 42, 128, 44, 45, 46, 129, 47, 48, 130, 44, 45, 46, 129	Business process management	1.2.1; 1.2.2; 2.1.1; 2.1.3; 2.1.5; 2.1.6; 1.1.4; 1.2.5	1.2; 1.2; 2.1; 2.1; 2.1; 2.1; 1.1; 1.2	1; 1; 2; 2; 2; 2; 1; 1
14, 24, 35, 36, 89, 106, 123, 124, 125,	Business strategy and leadership	1.2.1; 1.1.5; 2.1.2	1.2; 1.1; 2.1	1;1; 2
12, 87	Change management	1.1.5	1.1	1
9,11, 66, 84	Communication	1.1.5	1.1	1
13, 20, 21, 22, 23, 88, 100, 101, 102, 103	Culture	1.1.5; 1.1.9; 1.1.10	1.1; 1.1; 1.1	1
15, 16, 17, 92, 93, 28, 29, 117, 9, 15, 18, 94, 95, 3, 4, 5, 82, 91, 96	HR	1.2.4; 1.2.6; 1.1.3; 1.1.5, 1.1.7	2.2; 2.2; 1.1; 1.1; 1.1	2; 2; 1; 1;1
1,2, 16, 17, 27, 78, 79, 80, 81, 92, 93, 115	HRIS	1.1.1; 1.1.2; 1.1.6; 1.2.3; 1.2.4; 1.2.6	1.1; 1.1; 1.1; 1.2; 1.2; 1.2	1
19, 57, 58, 59, 60, 61, 97, 98, 99, 137, 38, 39, 40, 52, 127, 133, 10, 49, 50, 55, 85, 131 ,51,132, 31, 7, 8, 83, 120, 121, 118, 119	Information management	1.1.8; 2.2.6; 2.1.4; 2.2.3; 1.1.5; 2.2.1	1.1; 2.2; 2.1; 2.2; 1.1; 2.2	1; 2; 2; 2;1; 2
51, 53, 54, 55, 56, 132, 134, 135, 136	Product development	2.2.2; 2.2.4; 2.2.5	2.2; 2.2; 2.2	2

IQ = Interview question; RQ= Research question; RSQ = Research sub-question

Table 4.9 shows the link between the interview questions, findings and themes. The themes are: i) Business-IT alignment; ii) Business process management; iii) Business strategy and leadership; iv) Change management; v) Communication; vi) Culture; vii) HR; viii) HRIS; ix) Information management; x) Product development.

4.7   Summary of key findings

The research was based on a case study and focused on how an HRIS can be difficult to integrate and maintain during M&A. The business chosen is a insurance services company operating in Cape Town, South Africa. Chapter 4 outlined the findings based on the data collection from 15 participants. All participants gave their consent to the researcher to collect

data for this research study (Appendix A). The findings were then summarised and categorised, and themes were developed.

The chapter provides information on the 15 interviews, from which a total of 139 findings were identified, with 19 categories and ten (10) themes. The analysis started by transcribing the recorded interviews. Once transcribed, the transcriptions were emailed to the participants to verify the correctness thereof. After thoroughly reading the transcriptions several times, codes and concepts were identified. From the twenty (20) sub-themes, ten (10) themes were developed, which are: i) Business-IT alignment; ii) Business process management; iii) Business strategy and leadership; iv) Change management; v) Communication; vi) Culture; vii) HR; viii) HRIS; ix) Information management; x) Product development.

In Chapter 5, the research questions, findings and themes are discussed in relation to existing literature.

CHAPTER 5: DISCUSSION

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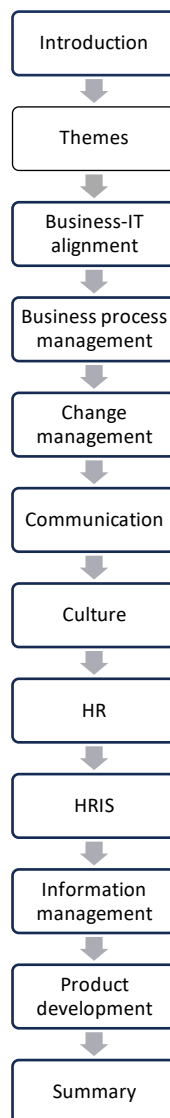
Figure 5.1: Layout of Chapter 5

5.1 Introduction

M&A can create synergies which may enhance an organisation's overall value. M&A requires, among others, the integration of an HRIS. The integration of policies and data into an existing HRIS is often one of the most difficult stages in M&A. In Chapter 5, the themes obtained from the findings of the transcribed interviews from the insurance services company are discussed. The discussion of the results is presented according to the research questions, aim and objectives, and conclusions have been drawn from the data analysis.

5.2 Themes

The following themes are discussed while answering the research question related to the theme:

i) Business-IT alignment (RQ1; RSQ 1.2; RQ2; RSQ 2.2)

ii) Business process management (RQ1; RSQ 1.1 & RSQ 1.2; RQ2; RSQ 2.1)

iii) Business strategy and leadership (RQ1; RSQ 1.1 & RSQ 1.2; RQ2; RSQ 2.1)

iv) Change management (RQ1; RSQ 1.1)

v) Communication (RQ1; RSQ 1.1)

vi) Culture (RQ1; RSQ 1.1)

vii) HR (RQ1; RSQ 1.1; RQ2; RSQ 2.2)

viii) HRIS (RQ1; RSQ 1.1; RSQ 1.2)

ix) Information management (RQ1; RSQ 1.1 ; RQ2; RSQ 2.1; RSQ 2.2)

x) Product development (RQ2; RSQ 2.2)

5.2.1 Business-Information Technology alignment

From the findings, business-IT alignment has been identified as a theme. Table 4.9 shows the link between the findings and the research sub-questions, namely: 1.1) What are the factors influencing the effective integration of an HRIS during M&A? 2.2) What strategies have organisations used in HRIS integration during M&A?

Business-IT alignment plays a major role in organisations worldwide. Business-IT alignment drives technological success, organisational success and competitive advantages of an organisation. For example, P8 argued that "successful integration is accomplished through different strategies which include getting all parties involved including IT to ensure that everything goes smoothly" (Appendix C). It is also crucial to understand the differences between the organisations' IT maturity levels. This is supported by Njanka et al. (2021:333) who state that "in todays' complex business environment, business leaders must involve IT solutions and projects to get a unique value in a competitive market".

Moreover, business and IT must collaborate in defining problems and setting the goals, vision and mission of the company. Although business and IT have different views about a strategy, it needs to be aligned to improve the organisation as a whole. Therefore, for organisations to achieve success, it is important that all elements that compromise the organisation, specifically IT, fully understand the organisation's business objectives and work collaboratively to ensure business objectives are met successfully. Organisations increasingly depend on IT and their capabilities to efficiently integrate IT resources into other organisational processes (Santos, 2021).

Although business-IT alignment is seen as important, achieving this alignment is challenging. Organisations spend millions on systems, only to find ineffective operations, work disruptions or loss of revenue. Luftman and Derksen (2012) argue that IT alignment remains elusive, not because of a lack of understanding the requirement or challenge, but rather because of a lack

of clarity in terms of who should be held responsible, which parties should contribute and what functions should be implemented. This is supported by P5 who noted that there was a lack of transparency in terms of communication (Appendix C). P8 furthermore indicated that to successfully integrate, there needs to be constant communication (Appendix C).

Another source of added costs and failure derives from the difficulty of business-IT alignment. From the findings (104, 105, 107, 108) it is evident that there was not an effective business-IT alignment strategy in place prior to the M&A, which resulted in a lack of awareness of the new system and processes, data discrepancies and insufficient training. P7 added that there were not enough of the relevant individuals included in the merger-related discussions (Appendix C). Finding 63 highlighted that IT has not been part of the merger-related discussions from the start.

Three participants (P3, P8, P12) accentuated the importance of understanding the difference between the organisations' IT maturity levels and having a business-IT alignment strategy in place. IT is frequently out of the decision-making processes which results in frustration, poor governance and lack of visibility. P15 added that it is important to get IT and business on the same page early on in the process (Appendix C). There should be sufficient planning in place for the integration. The decision-makers need to determine which system will be adopted and create a roadmap detailing who will be involved, which tasks need to be completed and outlining a timeline for completion. A communication plan to the business should also be created to outline various milestones.

IT integration is often assigned insufficient priority in merger discussions, with management focusing more on the strategic and organisational compatibility of the two organisations, leaving IT to a later stage. P11 said, "If the right people were included upfront, it would have made a difference, but I don't think enough, or the relevant individuals were included in the merger related discussions" (Appendix C). P10 said: "Identify integration and automation processes early on. Ensure that all systems and operations are fully integrated and functional in a timely manner" (Appendix C). P8 stated that it is important to understand all other business systems that are being utilised in the organisation and whether these systems can be integrated (Appendix C).

The alignment of business and IT exists when goals, activities and processes of an organisation are in synchronisation with the information systems supporting them. From a practice perspective, each organisation had its own practices before the merger and once the merger happened, the organisation had to create one process. P14 emphasised that all current processes and strategies would have to be adjusted to consider new employees that have no prior knowledge of the current system or process (Appendix C). P5 stated that organisations

should adapt processes and systems to fit the current and future needs of the organisation as this will reduce duplication of workflows (Appendix C).

Findings 63, 104, 105, 107 and 108 refer to the lack of business-IT alignment and a strategic consultancy process during the merger. To achieve alignment, both business and IT need to: i) understand the long- and short-term business strategies; ii) collaborate effectively; iii) sustain a high degree of communication; iv) be aligned; and v) attain a level of mutual trust (Njanka et al., 2021; Ullah & Lai, 2013; Smith et al., 2007; Hu & Huang, 2006). The findings point to a lack of alignment because of the factors described by Njanka et al. (2021), Ullah and Lai (2013), Smith et al. (2007) as well as Hu and Huang (2006).

5.2.2 Business process management

Business process management (BPM) has been identified as a theme. Table 4.9 shows the link between the findings and the research sub-questions, namely: 1.1) What are the factors influencing the effective integration of an HRIS during M&A? 2.2) What strategies have organisations used in HRIS integration during M&A?

In essence, BPM is a set of tools and techniques for improving processes and a method for integrating the entire organisation. The core activities of BPM involve an understanding and definition of processes and its key activities (Vom Brocke et al., 2021; Houy et al., 2011; Lin et al., 2006). BPM may seem trivial, and many organisations pay little attention to managing their end-to-end processes. A business process can cover different departments, geographical locations and management levels, among others. Reijers (2021) implies that it is essential to understand the steps being carried out as part of the business process, the people who are involved in the steps, and the technologies used when executing the steps.

The lack of managing processes can lead to various departments acting independently, with their own procedures, IT systems, etc. This is in support of P13 who found that from a practice perspective, each business had its own practices and once the merger happened, the business had to create one process (Appendix C). Business processes, according to the participants (P4, P7, P13), are based on what the specific process owner wants to be delivered. P7 mentioned that it took the organisation a while to get the merged organisation to agree on one process being delivered (Appendix C). Thus, in the merged organisation, different variants of business processes exist.

However, there is still push back from management who believes in manual processes rather than the automation of processes via the HRIS. P11 believed that if the organisation utilises more modules that are not being used on the system, it would eliminate manual processes and that everything should be standardised and automated across the business.

In contrast, Finding 49 highlighted that the HRIS contributed to the efficiency and effectiveness of business process automation and reporting during the M&A.

P7 added that,

> "You never going to get to a perfect system in terms of satisfaction for this kind of business and the size of the business because every division within this business needs are different. Again, the functional requirements that we provide is based on what the specific process or practice owner wants us to deliver on the system and not necessarily what management wants out of the system" (Appendix C).

P12 then noted that all processes are heavily dependent on leadership. It was also found that the merged organisation was still operating in silos (Finding 101). Breaking silos is important for merged organisations to achieve synergies. Breaking silos is the concept of unifying business units that perform similar business functions when two organisations merge (LugoSantiago, 2018). This concept is supplemented in a study by Reynolds and Hassett (2021), who found that rationalisation assists organisations with doing more with less, thus becoming efficient and putting effective measures in place. There are still improvements, enhancements and automation to be done that would potentially increase satisfaction in the organisation. Future expectations mentioned by participants (P3, P5, P8, P9, P10) included implementing artificial intelligence as a role player to increase process efficiencies, business process management improvements, system integration and digitisation.

5.2.3 Change management

From the findings, change management has been identified as a theme. Table 4.9 shows the link between the findings and research sub-question 1.1, "What are the factors influencing the effective integration of an HRIS during M&A?"

It has been found that most M&As fail because of poor handling of change management. P3 noted: "Change management is probably one of the most important regarding having a plan in place for all the changes, from communicating to the business, ensuring roles and responsibilities are assigned, identifying relevant stakeholders, etc." (Appendix C).

For M&A to be successful as a transformation initiative, it is important to identify the cycles of growth and maturity that an organisation will experience before, during and after the implementation of the change initiative. Change cannot be avoided but organisations should be prepared for resistance. All participants identified change management as a critical factor the organisation experienced throughout the integration process of the HRIS during the M&A. P7 said: "I do feel that if we had more of an effective change management plan or strategy in place, the company would have been able to focus on top priorities, engage and empower employees, and reduce disturbances in the workplace" (Appendix C). P6 emphasised that

"change management wasn't successful and this impacted the culture which is still not aligned today" (Appendix C).

Findings 12 and 87 indicate that there was a change management process in place, but it was not effective, and this had an impact on other factors in the company. One can argue that most organisations, when implementing change, focus on a technical perspective and do not recognise or understand how the human aspect of change can influence the success or failure of the planned change. P6 highlighted that,

> "A change management plan, better communication, transparency, providing more support to staff for example counselling—there wasn't a lot of that happening. There was not any visible support, because the merger started to have an impact on people's lives, their mental health, finances, their job security" (Appendix C).

There was a general feeling among the participants that the organisation has little or no regard to how employees felt during the M&A. According to the participants, the human aspect of the entire M&A process was never really considered. In the process of change, special attention must be paid to people, because their reaction to change is the factor that can make the difference between the failure and success of change. Change management should thus be a process focusing on people, their resistance, their coping mechanisms and ultimately how they accept change in the workplace (Iuliana, 2020; Gotsill & Natchez, 2007).

Handling change is often problematic for employees, particularly where they are not involved in decisions that have an impact on their jobs. Participants (P2, P3, P8, P9, P12, P13, P14, P15) indicated that there was a lack of communication during the change process and that the process was not transparent throughout. There was a lack of consultation during the change process; decisions and actions were taken that impacted on employees, but they were not consulted. These factors resulted in an escalation of speculation, fear and resistance to change. P14 noted that "employees generally see change as a threat which results in an increase in employee turnover because of the uncertainty about the future direction of the organisation and uncertainty about job security" (Appendix C). It is evident that although there was a general understanding of the reason for the change, there were still feelings of uncertainty due to the lack of communication and transparency.

The resistance to change can be attributed to the lack of communication, no clear vision, confusion and frustration, force of habit, fear of the unknown, job security and lack of support. Positive employee attitudes such as job satisfaction and commitment to change play an essential role in an employee's acceptance of change.

5.2.4 Communication

From the findings, communication has been identified as a theme. Table 4.9 shows the link between the findings and research sub-question 1.1, "What are the factors influencing the effective integration of an HRIS during M&A?"

Effective communication is important in managing uncertainty and crucial for effectively managing M&As. It is critical in getting the work done, building a sense of trust and increasing the productivity of employees and the organisation. It enhances teamwork and job satisfaction, and reduces absenteeism and employee retention. This helps reduce uncertainty, guides the business through the transition, enhances commitment to the new organisation and increases M&A success rates (Karanja et al., 2021; Allatta & Singh, 2011; Risberg& Gottlieb, 2019), whereas ineffective communication can lead to high levels of ambiguity, job insecurity, low levels of trust and communication. Findings 9, 11, 66 and 86 all refer to the effects of the lack of communication. Communication is a critical component during M&A; it is viewed as the backbone of M&A success and one of the prime reasons for M&A to exist. According to Nguyen and Kleiner (2003), delays in communication can result in employees feeling apprehensive and even hostile toward the M&A, making any subsequent communication process strained and difficult. Communication can impact on the feelings encountered by individuals during M&A, while management support can affect the happiness and anxiety of employees (Karanja et al., 2021). Furthermore, the mere announcement of a M&A creates a great deal of uncertainty and speculation.

All participants said the lack of communication resulted in misinterpretation, mistrust, low morale and low productivity; there was a lack of quality communication during the merger. Sinha and Sanchari (2014) cite the lack of communication as a major culprit in M&A, which affects both staff and clients. The authors further report that only one third of merging businesses adequately communicate information to mid-to-lower levels of the organisation, which leads to confusion, uncertainty and loss of trust, which, in turn, negatively affects staff morale. Therefore, according to de Leon (2020), communication must address fundamental human concerns such as what is going to happen to the employees, expectations from them and the benefit to employees, since employees involved in M&A are likely committed to the outcome of the merger. P13 indicated that there should also be effective communication to the employee. "There should be lots of openness and fairness in the merging process" (Appendix C). P12 stated that,

> "Communication was horrible during the M&A, leadership has a challenge when it comes to communication—they sort of keep the information and then share the information when they feel it is the right time but at the same time it is important to be transparent from the beginning so that it makes the whole process easier and people know what is coming and are better prepared for it" (Appendix C).

Findings 84, 86, 88 and 89 attribute the lack of communication during M&A to likely creating uncertainties that have a negative impact on employee behaviour, employee turnover and morale, resulting in counterproductive practices, job dissatisfaction and absenteeism. P5 and P8 both mentioned the lack of transparency in terms of communication during and after the merger and stated that it was harder to communicate and coordinate as a unified business (Appendix C). P9 emphasised the importance of keeping staff at the forefront of everything being done and implemented, as they are ultimately responsible for keeping the ship moving. P9 further said that staff need to be assisted to easily access information and navigate a system themselves to better carry out their jobs. Change needs to be communicated more and input needs to be obtained from the start.

System communication was also identified by P8 as a strategy to overcome merger-related impact on HRIS integration. Understanding how different systems within the organisation can communicate with each other is important. To successfully integrate a system there needs to be constant communication, for example, standardise data between businesses i.e., employee codes and positions. P13 added that communication for employees to understand the system is vital (Appendix C).

To summarise, the lack of communication influences the effective integration of an HRIS during M&A. This results in uncertainty, misinterpretation, mistrust, low morale, employee turnover, job satisfaction, absenteeism, lack of training, and low productivity.

5.2.5 Culture

From the findings, culture has been identified as a theme. Table 4.9 shows the link between the findings and research sub-question 1.1, "What are the factors influencing the effective integration of an HRIS during M&A?"

Organisational cultures and the way they are combined throughout the merger are crucial to its outcome. Managing culture usually receives low priority by executives who are overwhelmed by the operational aspects of integration (Engert et al., 2019; Marks & Mirvis, 2011). This case is no exception. P9 indicated that "when our organisation merged, the difficulty has been and still is integrating the culture of two very different organisations into one" (Appendix C). It is suggested that more attention and efforts be spent to properly evaluate the organisational culture fit before going ahead with the merger to increase its rate of success (Chesley, 2020; Appelbaum et al., 2007).

Culture incompatibility causes the lack of performance, departure of key executives and time-consuming conflicts in the consolidation of business (Liu et al., 2021). Culture plays a major part in the way employees react to the new structure of their work environment, ranging from quickly adapting and committing to new expectations, to resistance, withdrawal and other

forms of unproductive behaviors. The term *culture clash* has been used to describe the conflict of two companies' philosophies, styles, values and missions (Viskari, 2020). Lin et al. (2006) indicate that cultural differences would make integration efforts difficult to implement and lower the possibility of achieving potential synergies. It was also found that culture stood in the way of some of the transitions and changes (Finding 13, Table 4.7).

Participants in both companies indicated that culture was negatively affected during the merger. P12 said: "There was a culture shock, and when we merged, we sort of felt that we were stepchildren" (Appendix C). P8 added that "our companies had very different cultures and this resulted in a gap in communication and affected the performance of employees" (Appendix C). P10 noted that "over the years there has been a lot of emphasis on culture and communication. There has been a lot of drive on getting a unanimous culture—creating a common culture" (Appendix C). Finding 88 (Table 4.7) emphasises that the differences in culture resulted in a gap in communication and affected the performance of employees.

In many large companies built through M&A, there are often sub-cultures based on employees' prior affiliations (Antoniou et al., 2020). Participants were asked whether a new culture presented itself after the merger. Findings 100, 101 and 102 (Table 4.7) show that a new culture did not immediately emerge after the merger; the business operates in silos although Company C attempted to create a culture of a more modern approach to business. The majority of participants (10 of 15) had a negative view of the new culture. P3 indicated that a completely new culture did not emerge and that there are still certain silos of cultures scattered across the business. P9 opined that when the organisations merged, the difficulty has been and still is integrating the culture of two very different organisations into one.

5.2.6 Human Resource

From the findings, HR has been identified as a theme. Table 4.9 shows the link between the findings and the research sub-questions, namely: 1.1) What are the factors influencing the effective integration of an HRIS during M&A? 2.2) How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?

Research shows that M&A generally creates disruption, anxiety, anger and fear, among others. The earlier the HR function gets involved in the M&A, the greater is the likelihood of successful integration of people and processes throughout the newly formed organisation (Osuma et al., 2021; Rui & Yip, 2008; Srinivasan & Mishra, 2007). Uncertainty exists when two different organisations integrate. The longer the period of uncertainty, the higher the rate of failure of the integration process.

P7 said,

> "The first thing that we realised when we actually started the discussions after the merger was approved was that we had vastly different HR practices and to get those two together from a strategic perspective would be a challenge" (Appendix C).

The HR function plays an important role in organisational change by implementing specific practices that increase the favourability of employee perceptions of, and commitment to change. Thus, it becomes imperative to involve the HR professional before the deal is finalised (Daniel, 2021; Maheshwari & Vohra, 2015). HR must anticipate the impact of the M&A integration strategy on the organisation, build the organisation's change readiness and capability of its managers, and align structures, rules, policies, employee compensation, employee benefits, culture, pay structures, due diligence and employee designations to successfully manage the merger (Nandini, 2021; Uday-Bhaskar, 2012; Lindquist, 2007).

P9 said it is crucial to ensure that proper due diligence is followed to determine any updates, and that data are needed for a smooth transition. HR is often not part of the due diligence process, which means it is much more difficult to manage integration and process alignment (De la Salle & Thomas, 2021). As stated earlier, the sooner HR becomes involved in the merger, the more quickly the benefits of M&A can be reaped. Finding 64 (Appendix D) highlights that HR communication should happen early and not when the merger-related discussions are complete. According to P6, HR was thrown into the business side of the merger, attempting to get it done as soon as possible instead of providing support to the users/employees. There was (and still is) a break in the relationship between employees and HR, and trust is now lacking. P14 further indicated: "More time to get the HR department prepared in terms of ensuring the system is able to accommodate payment structures as well as change management" (Appendix C).

M&A brings a host of issues and can represent a major challenge for HR. As far back as 2001, Schuler and Jackson claimed that M&A fails because of the neglect of human resource issues and activities. Some of these issues include too little involvement of the HR function and employees, the lack of due diligence, job satisfaction, uncertainty, loss of motivation, culture and management differences, poor motivation, turnover, performance and uncertain long-term goals (Degbey et al., 2021; Gomes et al., 2013; Kavanagh & Ashkanasy, 2006; Huy, 2002). Five participants (P1, P4, P7, P11, P13) stated that job satisfaction has been affected negatively. P11 said: "There was some decrease in job satisfaction because of all the change that was happening" (Appendix C). P1 also said that "most people didn't even know if they had a job at that time. There was a decrease in job satisfaction as absenteeism and turnover increased which resulted in an overall low work drive" (Appendix C).

Six participants (P3, P5, P8, P9, P12, P15) stated that employee turnover was affected. P12 noted: "Employee turnover was high because of the uncertainty, employees did not know if they would be affected or not. People started looking for new jobs" (Appendix C). P3 indicated that "employee turnover was also impacted where some jobs became redundant" (Appendix C). P8 added: "Our companies had very different cultures and this resulted in a gap in communication and affected the performance of employees" (Appendix C).

5.2.7 Human Resource Information System

From the findings, HRIS has been identified as a theme. Table 4.9 shows the link between the findings and the research sub-questions, namely: 1.1) What are the factors influencing the effective integration of an HRIS during M&A? 1.2) What strategies have organisations used in HRIS integration during M&A?

HRIS integration is crucial for achieving organisational success because it ensures a seamless transition of the systems of the merging organisations. Organisations have become pervasively dependent on their information systems; this plays a critical role in the realisation of value in M&A.

The integration enables an organisation to be more efficient, productive and agile. However, it is not an easy transition and involves many issues. From the findings (1, 2, 16, 17, 27, 78, 79, 80, 81, 92, 93, 115), it was found that some of these issues include ineffective change management, not having IT/HR involved in the initial M&A discussions, poor planning, ineffective training and exposure to the HRIS, lack of support for staff, lack of communication, benefit alignment not done upfront, and lack of strategic alignment and due diligence. A study by de la Harpe and Thurner (2019) highlights the importance of IT integration and states that system integration is an ignored issue during M&A.

The involvement of IT at the beginning of the M&A lifecycle can be critical for the effective execution and realisation of benefits from a merger, acquisition or divestiture (Ahmadzai, 2020; Roehl-Anderson, 2013). Due diligence, especially concerning information systems' compatibility and integration issues, is critical. Many M&As do not reach business expectations because they stumble on the integration of technology and operations. However, a well-planned strategy for IT integration can help mergers succeed. Despite the complications, companies continue to pursue M&A due to the advantages and benefits achieved with the process (Renneboog & Vansteenkiste, 2019; Öberg & Tarba, 2013).

The findings (Table 4.9) indicate that streamlining processes and having accurate data readily available is what makes a system effective. P8 argued that organisations should constantly measure and examine the cost and benefits as well as how the system of choice will provide positive returns, because the business will always be growing and needs to keep up with the

latest technology trends. P8 furthermore opined that a good information system is a relevant component of the current business environment, and that PeopleSoft reduces geographical gaps within the business and is effective for the business, but much can still be improved.

P9 indicated that understanding impact, adoption and change management is essential in implementing an HRIS. Having key stakeholders onboard who are aware of the HRIS implementation is extremely important. P5 opined that the business needs to adapt processes and systems to fit current and future needs of the organisation and reduce duplication of workflows. P6 stated factors such as: i) identifying commonalities in data; ii) approaches to sharing data in order to reduce errors; iii) standardising data across the business; and iv) understanding the various systems used within the business and how each system integrates with another. P7 emphasised the importance of having a post-project review to identify what worked and what did not, and how it can be done better in the future. P8 mentioned that to successfully integrate a system, there needs to be constant communication, and data (employee codes and positions) between businesses need to be standardised. P9 said it is vital to keep staff at the forefront of the implementation, as they are ultimately responsible for keeping the ship moving.

5.2.8 Information management

From the findings, Information management has been identified as a theme. Table 4.9 shows the link between the findings and the research sub-questions, namely: 1.1) What are the factors influencing the effective integration of an HRIS during M&A? 2.2) How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?

In the 21st century, data will drive an increasing number of business decisions and strategies. HRIS is an example of an area where businesses can capitalise not only on administrative cost savings, but also on leveraging a strategic advantage through information gathering, processing and sharing. Historically, the way information is gathered and stored has changed and organisations have begun to recognise the value in terms of providing management with strategic data and merging HRIS data into corporate strategy.

The employment of an HRIS is designed to improve the effectiveness and accuracy of information by using technology to simplify processes. From the interviews, questions were asked relating to the capturing, recording, and retrieval of data from the HRIS. Findings 118 and 119 (Table 4.9) indicate the risks of data being captured incorrectly and the different processes being followed by employees when data are captured. Participants noted that data integrity on the HRIS should be improved and that there should be more restrictive fields for the individuals capturing information. The data collected from the HRIS provides management with a decision-analysis tool rather than merely a robust database. The HRIS can provide

detailed information in a variety of areas. The HRIS will not only benefit employees and managers, but also suppliers, consultants, benefit providers and others (Tawaha et al., 2021; Kovach et al., 2002).

The HRIS should become the tool for sharing information across an organisation's functional areas. Future HRISs can be the one-stop solution for a majority of company-related transactions between employers and employees. This would enable employees in different locations to have access to the same information. It would also allow for a scalable information system linking employees not only to their own data, but also to other relevant organisational information. An important factor mentioned about information management is data transfer— incorrect data transfers can create challenges for the organisation, resulting in significant losses.

P2 mentioned that,

> "Keeping that data up to date and correct is a consistent challenge. As an organisation, we realised that we need people data to make decisions even more so in a merger. I mean when the companies merged—we had duplicated roles and how would we know if we couldn't extract a report" (Appendix C).

Findings 19 and 30 (Table 4.7; Appendix F) elaborate on the fact that there is distrust because of incorrect data on the system. One of the difficulties with implementing an HRIS during M&A is making sure that the data are secure yet available to those who need it. P7 added that "the problem is between the chair and the actual keyboard. I think the way that we are require capturing to be done and the recording and retrieval thereof is not necessarily as simple as we would want it to be" (Appendix C).

5.2.9 Product development

From the findings, Information management has been identified as a theme. Table 4.9 shows the link between the findings and research sub-question 2.2: "How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?"

In many industries, the survival of organisations is increasingly determined by their success in new product development and by adding new products or functionalities as part of the competitive process (Gautier & Lamesch, 2021). Developing or reconfiguring new products in the context of changing circumstances is a complex process—it takes time, costs money, and requires the collaboration, communication and coordination of cross-functional and cross-regional teams (Fischer et al., 2021).

From the findings (Table.4.9), emphasis is placed on the organisational processes and communication that underlie product development. The organisational perspective elicited

many issues related to product development, including e-learning, user control, adopting new capabilities and technologies, digitalisation and simplification, artificial intelligence, group decision making and communication.

P7 noted that,

> "we are sitting in a position where we can integrate in a world class format and design to any system and service across the business but there's lots of outdated technology and systems which doesn't always allow you integrate in that specific way so that's a challenge because we've got legacy systems" (Appendix C).

Based on the findings (51, 53, 54, 55, 56, 132, 134, 135, 136), the participants (P3, P5, P8, P9, P10 P14, P15) indicated that improvements and enhancements can be made to the user interface and certain processes to increase user satisfaction. The participants also noted that from a transactional perspective, the system delivers on business requirements but in the future, the business will start integrating more advanced systems for other functionalities.

Furthermore, adopting new products and functions increases the need for training. There are conflicting views on training in the organisation. Some participants (10 of 15) indicated that the system and functionalities have been developed so that it is easy to use and no training is required, whereas other participants indicated that there is insufficient training on new product developments and processes.

5.3   Summary

In this chapter, the findings derived in Chapter 4 were discussed. The findings were grouped into themes to narrate how the rationalisation was undertaken in the merged financial institution. Based on the findings, the literature review discussed in Chapter 2 was used as a guiding instrument to assist with the recommendations that will be deliberated on in Chapter 6.

Ten themes were discussed and the research questions were answered.

RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?

RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?

The factors that have been identified are:
  i)   Poor planning
  ii)   Time pressure
  iii) Ineffective change management and communication
  iv)   Lack of strategic alignment and due diligence
  v)   Benefit alignment not done upfront

vi) Not having IT/HR involved in the initial M&A discussions

vii) Lack of training and exposure to users

RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?

Strategies achieved in the implementation of an HRIS during M&A:
i) Upfront benefit alignment
ii) Data alignment and standardisation across the business
iii) Aligning and streamlining processes
iv) Having key stakeholders onboard and having them aware of such implementation
v) Understanding how each system integrates with another
vi) Constant communication within the business
vii) Understanding the differences between the organisations' IT maturity levels
viii) Having and effective business-IT alignment strategy
ix) Effective change management plan

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?

Modules identified are:
i) Payroll
ii) Benefit administration
iii) Employee and manager self-service to create a sense of empowerment and increase system engagement
iv) Analytics
v) Recruitment and selection
vi) Performance
vii) Learning and development

RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?

Strategies identified are:
i) To standardise and streamline processes
ii) To support the achievement of the strategic objectives in combining companies
iii) To consolidate information
iv) To enable the organisation in facilitating workforce management and managing data on one central system

v) To facilitate data-enabling decision making and automation of processes

vi) To empowering employees with self-service

vii) Automation of recurring tasks

viii) Knowledge transfer

ix) Provides a holistic view of information

CHAPTER 6: CONCLUSION, RECOMMENDATIONS AND FURTHER RESEARCH
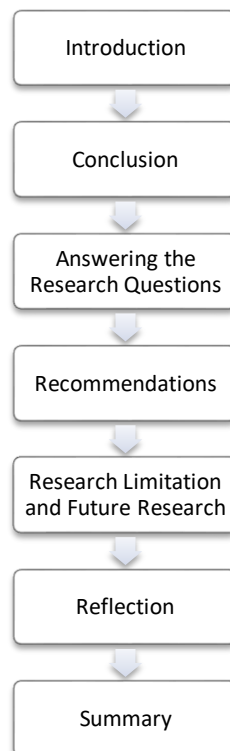
Figure 6.1: Layout of Chapter 6

6.1 Introduction

When it comes to merging businesses, the skills and strategies needed to implement a successful merger often require a new set of skills and strategies. Technology needs to be taken into careful consideration when dealing with the merger of organisations. The purpose of merging systems is to ensure that the new enterprise has systems in place that make the new business operations easier, more automated and efficient.

Chapter 6 outlines the research aim and objectives of the study, answers the research questions, and presents the limitations and future research in relation to the study. The reasons why organisations are not effectively integrating HRISs were identified using the research questions. The chapter also propose recommendations based on the findings of the research.

6.2 Conclusions

As more organisations deploy various HRISs to business transactions, the HRIS function becomes even more important in M&A. The HRIS has moved beyond the HR department and affects the entire organisation, including senior management, line managers and employees. With this advancement, the HRIS has become more complex and is intertwined with many

elements of an organisation. Effective IS integration and implementation is vital to a merged organisation's projected advantages. An organisation's M&A strategy must be placed first, followed by the alignment of the IS integration plan to support its M&A operations. Organisations should recognise that IS integration may play both a proactive and a reactive role in M&A, and early involvement of IT and HR in the integration life cycle is crucial to M&A success.

6.2.1 Answering the research questions

The problem statement was formulated as follows: It is challenging for the newly-formed organisation to integrate and maintain the HRIS during and after M&A in order to gain the potential benefits. The aim of the study was to explore the reasons for HRIS integration failure before and after M&A, which is answered by the research questions as follows:

6.2.1.1 Research question 1

RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?

In examining the process involved in integrating the HRIS during M&A, organisations need to address the following challenges: i) poor planning; ii) time pressure; iii) ineffective change management and communication; iv) lack of strategic alignment and due diligence; v) benefit alignment not done upfront; vi) not having IT/HR involved in the initial M&A discussions; and vii) the lack of training and exposure to users to be able to effectively integrate the HRIS.

While each M&A may be different in size, scope and structure, most M&As typically present significant challenges in terms of integrating technology such as the HRIS. Undoubtedly, having the right plan and strategy in place can eliminate issues and extract significant value from the combined organisation.

6.2.1.2 Research question 2

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

Focusing on integrating an HRIS and gaining new efficiencies through the M&A process is critical to the combined organisation. Each organisation already has its own systems and processes in place for all business functions—payroll, recruitment and selection, learning and development, analytics, etc. One of the important challenges is to rationalise these systems and follow a roadmap that leads to the optimisation of these resources. This process must be undertaken with a view to improve existing operations.

An important aspect of integrating systems is recognising that integration and change should take place with as little disruption as possible to operations. The HRIS can be utilised to achieve organisational success during M&A by being able to: i) standardise and streamline processes; ii) support the achievement of strategic objectives in combining companies; iii) consolidate information; iv) facilitate workforce management and manage data on one central system; v) facilitate data-enabling decision making and automate processes; vi) empower employees with self-service; vii) automate recurring tasks; viii) knowledge transfer; and ix) provide a holistic view of information.

The general conclusion from exploring IS integration during M&A is that there are many factors identified that influence IS integration decisions and outcomes. It is easy to see why IS integration is regarded as one of the critical problem areas inhibiting successful M&A. On the other hand, IS integration capabilities, if managed effectively, can lead to the realisation of benefits in M&A.

6.3 Recommendations

The recommendations in this study are in the form of a guideline on integrating and maintaining the HRIS during and after M&A for the newly-formed organisation to gain the benefits from using the system:

i) **Create a pre-merger process:** Involve all relevant stakeholders at the start of the merger.

ii) **Have an effective plan of action in place:** Most of the work during M&A is done before the integration actually begins. Determine which system to keep, what data is important, and how much integration is needed before combining the two organisations.

iii) **Effective business process management:** This should be in place to determine the goals and objectives of HRIS implementation.

iv) **Appointment of a steering committee:** This is important for guiding the HRIS implementation process and the users of the system.

v) **Simplification and modification of the HRIS:** Customise some of the system functionalities for simplification purposes, eliminate complexities and difficulty in operation. Invest in change adoption and ensure that the often-used functions are working optimally.

vi) **Conduct effective training:** Training must cover the technologies being employed and the systems and work processes being introduced. This will help improve effective knowledge integration.

vii) **Effective change management plan:** This will help the organisation to stay focused on top priorities, engage and empower employees, and reduce disturbances.

viii) **Efficient communication processes:** Effective communication is important in managing uncertainty and crucial for the effective management of acquisitions. This will guide the organisation through the transition and enhance commitment to the new organisation. It will furthermore define the direction of the new organisation and communicate how the formation of this new organisation suits the overall vision.

ix) **Due diligence and process management:** Aligning and automating processes will include aspects such as benefit alignment and data management to ensure a smooth transition.

x) **Align cultures:** An examination of cultural differences between the two organisations planning to merge must be done. Identify whether there is a good cultural match and whether values are in line with achieving the organisation's overall strategy.

xi) **Have a post-merger process in place:** This process will reinforce core competencies, build forward momentum, and implement a flexible, collaborative, methodology for future consolidation.

xii) **Strategic alignment and governance:** There should be mechanisms in place to ensure that each organisation is aligned in terms of goals and accountability. This will help avoid conflicts of interest and problems in the power structure of the new organisation.

6.4 Research limitation and future research

The main limitation of the study was that only one insurance organisation, based in South Africa, was used. Therefore, the researcher cannot and does not claim in any way that this study is generalisable and that the findings are applicable to all South African merged organisations in the financial services industry. The study had setbacks in terms of data collection as there were delays in the scheduling of interviews and availability of participants. These challenges increased with the COVID-19 pandemic. Only employees in the HR and IT departments at the organisation's offices in Centurion and Cape Town took part in this study.

It is therefore recommended that future research be done on a broader scale and possibly include all departments in the organisation that utilise the HRIS. A broader or deeper level of insight may be attained by expanding the scope and unit of analysis of the research. Future research could also include conducting the study in different industries such as e-commerce, retail and information and communications technology to explore the reasons for HRIS integration failure before and after M&A.

6.5 Reflection

Conducting the research and completing the thesis has definitely increased the level of my professional competency in numerous ways. Firstly, I have developed a critical mindset towards solving business issues. The critical analysis skills that I have developed and applied to the study can easily be applied to real business issues that I would need to resolve in my professional capacity in the future. Secondly, the completion of the thesis was similar to project management in terms of strict deadlines, scarcity of resources, and organising, planning and scheduling interviews, among others. Therefore, the skills that I have developed during the process of completing the thesis can be used to successfully manage business projects. Moreover, my writing skills have significantly improved and the importance of great writing will always remain significant.

Lastly, my time-management skills have also been improved by the end of the thesis because of the deadline for submission. The principles I used was setting specific deadlines for each chapter, transcribing interviews immediately after conducting an interview, carving out a chunk of time each day to conduct research, and setting up recurring check-ins with my supervisor. Although this worked well, I could have transcribed my interviews differently. I have now discovered an application that transcribes interviews verbatim, which takes about four to five minutes. I could have spent the time better if I used this technology.

However, the entire process was an immensely beneficial experience for me on both a personal and professional level. The initial research was done during my employment at the organisation, and the completion of the thesis was after this employment concluded. This was challenging in terms of scheduling interviews and gaining access to information. During the completion of my Master's degree I lost two grandparents, became engaged, planned a wedding, got married and my entire family tested positive for COVID-19—all of these hampered my research. Notwithstanding, my supervisor provided guidance and support throughout the process. He equipped me with the knowledge to effectively conduct a research study and increased my level of interest in pursuing my PhD.

6.6 Summary

This research aimed to explore the effect of the HRIS on the M&A of a selected financial institution in the Western Cape. The study further aimed to explore the reasons for HRIS integration failure before and after M&A. The case study was a merging financial insurance services institution. Fifteen participants were interviewed. At the beginning of the research it was unclear whether the newly-formed organisation found it challenging to integrate and maintain the HRIS during and after M&A in order to gain the potential benefits.

However, the research found that where integration fails, a large proportion of this failure can be attributed to the lack of integration. In addition to the integration challenges, the study identified many factors to be considered for successfully integrating an HRIS during M&A; of these, business process management, change management, communication, culture, HR, information management, product development and business-IT alignment are the main factors. This means that all M&A goals and the associated tasks and processes should be focused on business operations and the overall business strategy, with technology being implemented and utilised in the background with the sole purpose of meeting those strategies. Technology should be integrated and aligned within the organisation's operational structure.

While it may seem intuitive, it is important to consider the various steps necessary to align the many elements of an organisation. This includes the alignment of the various strategic capabilities of both parties. To reap the benefits of M&A, both parties need to ensure that they merge in a way that is strategically advantageous.

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APPENDIX A: EXAMPLE OF INDIVIDUAL CONSENT FORM

Cape Peninsula
University of Technology

BUSINESS AND MANAGEMENT SCIENCES, GRADUATE CENTRE FOR MANAGEMENT

INDIVIDUAL CONSENT FOR RESEARCH PARTICIPATION

TITLE OF THE STUDY: The effect of HRIS on the merger of a selected financial institution in the Western Cape.

NAME OF RESEARCHER: Mieshka Paulse

EMAIL: mieshpaulse@gmail.com

NAME OF SUPERVISOR: Dr A. De la Harpe

CONTACT DETAILS: 082 448 1058

EMAIL: andre@i2ifica.com

PURPOSE OF THE STUDY: The aim of the study is to explore the reasons for HRIS integration failure before and after M&As.

CONFIDENTIALITY: I have received assurance from the researcher/student that the information I will share will remain strictly confidential unless noted below. I understand that the contents will be used only for M Tech Thesis and that my confidentiality will be protected by creating a code for each learner.

ANONYMITY: My identity will be protected by not disclosing my personal details. I will be referred to as a research participant in the research study.

CONSERVATION OF DATA: The data collected will be kept in a secure manner. The researcher will keep data at his office and the offices of the supervisor, Dr de la Harpe. Data will be electronically stored and only the researcher and supervisors will have access to the data. The school may at any time be given access to the data or be given a report or information session if needed. The data will be collected and stored as per research method fully described by the researcher especially for audit purposes.

VOLUNTARY PARTICIPATION: I am under no obligation to participate and if I choose to participate, I can withdraw from the study at any time and/or refuse to answer any questions, without suffering any negative consequences. If I choose to withdraw, all data gathered until the time of withdrawal will be disregarded.

ACCEPTANCE: I agree to participate in the above research study conducted by Mieshka Paulse the Faculty of Business and Management Sciences, Graduate Centre for Management at the Cape Peninsula University of Technology, which research is under the supervision of Dr Andre de la Harpe.

If I have any questions about the study, I may contact the researcher or the supervisor. If I have any questions regarding the ethical conduct of this study, I may contact the secretary of the Faculty Research Ethics Committee email WaltersC@cput.ac.za

Participant's signature:_____

Date:15/10/2019

Researcher's signature: _____

Date: 15/10/2019

APPENDIX B: INTERVIEW GUIDE

Cape Peninsula
University of Technology

Dear Research Participant

Request for permission to conduct an on-site, semi-structured interview

You are invited to participate in an on-site semi-structured interview, conducted in fulfilment of a research project for a Master's Degree within the Faculty of Informatics and Design at the Cape Peninsula University of Technology (herein referred to as 'CPUT').

The research project aims to explore the reasons for Human Resource Information System (HRIS) integration failure during a Merger and acquisition (M&A). The research project is undertaken by Miss Mieshka Paulse, a registered Masters student at CPUT. An on-site interview/meeting shall be formally scheduled at a time most convenient to you. The duration of the meeting is not intended to exceed 60 (sixty) minutes.

Your participation in this study is entirely voluntary. You have the right to withdraw at any time and for whatever reason, without any penalty whatsoever. The information obtained from the questionnaire shall be treated with full confidentiality and shall only be used for academic purposes. Anonymity shall be maintained, as responses are not identifiable to your organisation. Furthermore, the research project has received ethical clearance from the CPUT's Ethics Committee and therefore has been found to not hold any significant ethical implications.

Enclosed is the semi-structured questionnaire, which shall dictate the structure of the on-site interview/meeting. It consists of about 30 open-ended questions the primary investigator (Mieshka Paulse) wishes to present to you. However, you have, at any time, the option to omit a question(s) you do not want to answer.

Copies of the completed questionnaire shall be shared with you electronically within one month upon completion. Written consent of your participation is required by means of electronically making such intentions known, that is, by replying to the mail in which this document was attached. Your participation in this research is greatly appreciated.

Sincerely,

Mieshka Paulse

Semi-structured questionnaire

RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?
Q1.1.1: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not? *Response:*
Q1.1.2: Do all the employees have access to the HRIS?   If yes, what level of access? If no, why not? *Response*:
Q1.1.3: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not? *Response*:
Q1.1.4: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus) *Response:*

Q1.1.5: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A?

No.	Factors (Use an X for choice)	Yes	No
1	Leadership		
2	Software and development		
3	Communication		
4	Change management		
5	Culture		
6	Employee turnover		
7	Performance appraisals		
8	Job satisfaction		

Mention other factors that your organisation went through in HRIS implementation?

Response:

Q1.1.6: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so?

If no, why not?

Response:

Q1.1.7: Is there effective team work and staff participation in your organisation to support the implementation process of the HRIS?

 If yes, why do you say so?

 If no, why not?

Response:

Q1.1.8: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (Ticking choice or use an X).

☐	High
☐	Medium
☐	Low

Why do you say so?
Response:

Q1.1.9: Did a new culture present itself after the merger?
If yes, why do you say so?
If no, why not?
Response:

Q1.1.10: What is your opinion of the new culture?
If yes, why do you say so?
If no, why not?
Response:

RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?

Q1.2.1: What strategies should be put in place prior to M&A?
Response:

Q1.2.2: What strategies should be put in place post-M&A?
Response:

Q1.2.3: What HRIS system was used prior to the M&A?

Response:

Q1.2.4: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below?

No.	Strategies (Use an X for choice)	Yes	No
1	Recruitment and selection		
2	Training and Development		
3	Recognition and Rewards		
4	Payroll		

What other strategies does your organisation accomplish?

Response:

Q1.2.5: How effective is the capturing, recording and retrieval of data from the HRIS?

Why do you say so?

Response:

Q1.2.6: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A?

 If yes, how do you know?

 If no, why not?

Response:

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?

Q.2.1.1: Indicate which of these modules are implemented by the HRIS of your organisation?

No.	Modules (Use an X for choice)	Yes	No	Not sure
1	Payroll			
2	Time management			
3	Benefit Administration i.e. retirement, medical aid			
4	Recruitment and selection			
5	Performance			
6	Employee self-service			
7	Analytics			

What other modules does the HRIS have?

Response:

Q2.1.2: Do the current HRIS modules suit the kind of business that your organisation operates in?

If yes, how?

If no, why not?

Response:

Q2.1.3: Which of the HRIS modules are frequently used by your organisation?

Response:

Q2.1.4: Does your organisation upgrade the HRIS and software development?

If yes, how often and why?

If no, why not?

Response:

Q2.1.5: How would you rate the contribution of HRIS to the continuity and success of your organisation? (Ticking choice or use an X)

☐ High

☐ Medium

☐ Low

Why do you say so?

Response:

Q2.1.6: How would you rate management satisfaction with the HRIS? (Ticking choice or use an X)

☐ High

☐ Medium

☐ Low

Why do you say so?

Response:

Q2.1.7: How would you rate staff satisfaction with the HRIS? (Ticking choice or use an X)

☐ High

☐ Medium

☐ Low

Why do you say so?

Response:

RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?

Q2.2.1: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A?

If yes, how?

If no, why not?

Response:

Q2.2.2: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?

Response:

Q2.2.3: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS?

If yes, mention? If no, why not?

Response:

Q2.2.4: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?

Response:

Q2.2.5: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?

Response:

Q2.2.6: What can assist you to overcome the integration challenges you are currently facing?

Response:

Q2.2.7: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?

Response:

Q2.2.8: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?

Response:

APPENDIX C: INTERVIEW TRANSCRIPTIONS

PARTICIPANT 1

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** The company uses Oracle PeopleSoft as our HRIS. PeopleSoft was first introduced to the company in 2005. It is an ERP solution that integrates human capital management, financial management, supplier relationship management, enterprise services automation and supply chain management.
Q.1.1.2	**Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** So when you talk about all employees we have uh commission based employees that don't have access because they are on a different system completely but definitely all permanent staff have access. The access is role dependent. So generally, you have your basic ESS system Uh where you can apply for leave, check your payslips and stuff like that. That will be for all employees. Then you get your different levels of management. Manager level access would be for, to view different uh reports and stuff like that with regards to their area. Then you will have the HR access which has got full access to all employees. **INTERVIEWER:** okay perfect **PARTICIPANT:** So generally, you have your basic ESS system **INTERVIEWER:** hmm **PARTICIPANT:** Uh where you can apply for leave, check your payslips and stuff like that. That will be for all employees. Then you get your different levels of management. Manager level access would be for, to view different uh reports and stuff like that with regards to their area. Then you will have the HR access which has got full access to all employees.
Q.1.1.3	**Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** So we do a lot of online training, uh where we send videos around to, to, to, if there are any changes to the system. But like uh, uh, you know when you are an employee you must ask yourself how often do you actually use the system. If you take a manager for example, that uh has to use it for reporting and stuff like that we, we, try and do one-on-one training with them or else they use the videos that they receive. But we normally deal with queries as they come along. So in other words, an employee will log on this month and he needs to do something although we send out a document to say this is how you do it, we understand that if people are not going to look at it they are not going to use it. Make sense? So when they use it we will deal with it at that time. New users get training as part of their induction and get a basic rundown of the system. **INTERVIEWER:** Okay, but uh like a new user, do they get training?

	PARTICIPANT: Oh yes, they go through it as part of their induction; they get a basic rundown on the system and whatever.
Q.1.1.4	**Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** So you are aware that our IT department here is quite huge **INTERVIEWER:** Hmm **PARTICIPANT:** They are responsible for all the (pause) uh security **INTERVIEWER:** Ya **PARTICIPANT:** So we haven't had any uh in I don't know how many years so I would say that it is working **INTERVIEWER:** Okay, so there is security in place **PARTICIPANT:** Yes there is information security in place. I'm not sure what kind. **INTERVIEWER:** Okay uhm okay. Can I move onto the next question? **PARTICIPANT:** Yes
Q.1.1.5	**Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A?** **PARTICIPANT:** When you uh, when you referring to Merger and acquisition are you referring to the Company A and Company B merger? **INTERVIEWER:** Ya, or whichever other merger in the business, there has been a few but generally yes **PARTICIPANT:** Uhhh, I just joined the Company at the time of that merger **INTERVIEWER:** Hmmm **PARTICIPANT:** I wasn't really involved in the whole merger. **INTERVIEWER:** Okay but in your opinion do you feel like any of these factors was influenced during the merger or was it not? **PARTICIPANT:** So leadership definitely because you must remember you have the leadership of two big companies coming together. Software and development would be as well, same thing, you would have your two sets of software and IT guys. **INTERVIEWER:** So is it a yes to all? **PARTICIPANT:** Ya, so all of these factors would have been affected by the merger. In other words job satisfaction, you don't even know, most people didn't even know if they had a job at that time. There was a decrease in job satisfaction as absenteeism and turnover increased which resulted in an overall low work drive. **INTERVIEWER:** Ya that's true. Are there any other factors that your organisation went through? **PARTICIPANT:** Naaa I think those, those were the main ones that you are looking at there as well

Q.1.1.6	**Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?**
	PARTICIPANT: Ah I suppose it does affect the size, we, we uh are seventy thousand people in this business well sixty thousand now obviously you will have your uh, issues with access because the people are all over the show, so in order words your remote areas, would be difficult to access the system like we do via the network easily [in audible] uh so if it is that you are not going to use it very often; it is just normal human behavior.
	INTERVIEWER: Hmm ok
	PARTICIPANT: Whereas in smaller companies, if you have a few people sitting in one little office then it makes it easier to use the system
	INTERVIEWER: Ya
	PARTICIPANT: Then it makes it easier to use it
	INTERVIEWER: To use the system?
	PARTICIPANT: Ya, but generally, generally, we don't have, we haven't had any issues with people complaining about access and stuff like that and it is being used quite throughout the business.
Q.1.1.7	**Is there effective team work and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?**
	PARTICIPANT: We, we, uhm, as you are aware we run a shared-service environment, where the system sits within our Human Capital Enablement team before the merger HR was not centralised.
	INTERVIEWER: Hmm
	PARTICIPANT: So we make sure that the system is always updated, that its running and that uh communication is sent throughout the business to make sure that people are utilising the system so in terms of their performance excellence, in terms of you uh, any sort of development that we do. We send out proper communication to the whole business to make sure
	INTERVIEWER: Ok, so it is effective?
	PARTICIPANT: Ya, our, our support is internal so we have all our development team sitting internally we don't rely on vender to make any changes to the system
	INTERVIEWER: And it's been effective that way?
	PARTICIPANT: Ya
Q.1.1.8	**Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?**
	PARTICIPANT: So there is a level of trust and If I had to give it would be medium. It is growing now because a lot more communication is sent to the business because it is a central system and its managed centrally so the communication has increased, the development has increased over the last two years so it is becoming a very useful system, tool that that [inaudible] we are equipping them with more information [inaudible] so that they can effectively manage it.
	INTERVIEWER: Perfect **PARTICIPANT:** So right now I will put it as medium but moving up

	INTERVIEWER: Hey? Medium?
	PARTICIPANT: Ya and its moving upwards
Q.1.1.9	**Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?**
	PARTICIPANT: When you talk about culture what are you talking about – the whole business as a whole?
	INTERVIEWER: Ya
	PARTICIPANT: So you must remember ==there was still this, this culture of the two companies working separately.== If you look at, at uh Cape Town, our Cape Town branch
	INTERVIEWER: Ya
	PARTICIPANT: It's still referred to as Company A cause Company A was based in Cape Town and in Centurion it was Company B
	INTERVIEWER: Hmm
	PARTICIPANT: Uhhh, we don't really, well I don't see the difference. I don't think Company B and Company A are any different. I can't answer for the rest of the business.
	INTERVIEWER: Hmm, but you feel like even after the merger the two, it was still the same culture?
	PARTICIPANT: Ya
	INTERVIEWER: Ok, so nothing changed? Everyone's values were the same, there wasn't any culture shock moving, like blending in with the different companies, everything was, was…
	PARTICIPANT: No no, we mitigated that so we looked at it so we don't just go once the merger took place just started moving and changing.
	INTERVIEWER: Ya
	PARTICIPANT: ==Everything stayed the same until we got use to it and then uh we slowly integrated the two companies together==
Q.1.1.10	**What is your opinion of the new culture? If yes, why do you say so? If no, why not?**
	PARTICIPANT: Uhm I don't think it's a new culture
	INTERVIEWER: hmm
	PARTICIPANT: We had to ==integrate two cultures==, but it ==never created a new culture==. ==Each company had its own culture==.
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	**What strategies should be put in place prior to M&A?**
	PARTICIPANT: Uhmm This is a difficult question
	INTERVIEWER: Hmm
	PARTICIPANT: But like I said, with this merger we didn't just go willy nilly and go and put PeopleSoft everywhere and go put this everywhere and that everywhere. We took a few, a long period of time; I think it was a couple of years before we actually started

	putting the system in place. We first need to put, ==make your employees feel secure and safe through the merger== and say this is a merger happening here but this is what we going to do to sort of uh implement things and this is the period we use. So ==effective planning and communication.==
	INTERVIEWER: Okay
	PARTICIPANT: [Inaudible]
	INTERVIEWER: Sorry, yes?
	PARTICIPANT: No No carry on
Q.1.2.2	**What strategies should be put in place post-M&A?**
	PARTICIPANT: Uhmm, we were always using PeopleSoft at that time. I think it was more on the Company A side that changed.
	INTERVIEWER: Hmm
	PARTICIPANT: So like I said I can't comment on Company A because I don't have access or never had access to that side of the business
	INTERVIEWER: Uhmm but when you were working on the system did you experience any issues that you felt like this should've been, we should have focused on something like this before we moved these people into the system or you know was there any issues around uhm
	PARTICIPANT: Like I said ==when we did this merger we just put everyone in the system. We gradually integrated it==.
Q.1.2.3	**What HRIS system was used prior to the M&A?**
	PARTICIPANT: So the company that I came from or we used E-business at the time and we had to merge into PeopleSoft.
Q.1.2.4	**Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?**
	PARTICIPANT: So we used ==all of those things. Recruitment and selection, training and development, recognition and rewards, and payroll.==
	INTERVIEWER: Hmm, is there anything else?
	PARTICIPANT: We uh, no I don't think so that should be it
Q.1.2.5	**How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?**
	PARTICIPANT: So at the moment it is ==effective==, we like I said uh because its ==centrally based== now ==we moved onto a new reporting system== that uh is quite effective so ==we get information as and when it's needed== and all ==our documents are scanned into the system== so under ==each employee there is a record of all that documents== that affects them personally.
	INTERVIEWER: Hmm
	PARTICIPANT: Ya so it's quite effective at the moment
	INTERVIEWER: And before?

	PARTICIPANT: Before, uh the ==administration wasn't as effective== as it is today
	INTERVIEWER: Ok
	PARTICIPANT: and uh, that time you ==only had a certain amount of reports that you could access== and you ==had to request and now you got full access to the system== so if you need a specific report its done almost immediately within a period of two days maybe
	INTERVIEWER: And is the report uh, accurate?
	PARTICIPANT: Yes like I said our data, data is doing quite well now because we managing it
Q.1.2.6	**Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?**
	PARTICIPANT: I wasn't part of the system that time, I was still using EBS that time but it hasn't changed much from what it was so it should be still secure.
RQ2: How can the HRIS be utilised to achieve organisational success during M&A?	
RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?	
Q.2.1.1	**Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics. What other modules does the HRIS have?**
	PARTICIPANT: So the only one that does not fit in here is Time Management
	INTERVIEWER: Okay, but yes to all besides time management?
	PARTICIPANT: Besides time management, time management is a system on its own
	INTERVIEWER: And what, so it's not part of the HRIS?
	PARTICIPANT: No
	INTERVIEWER: Okay, that's fine. Are there any other models?
	PARTICIPANT: [inaudible] hmm?
	INTERVIEWER: Are there any other models? That you guys use?
	PARTICIPANT: [long pause] No
	INTERVIEWER: Okay.
	PARTICIPANT: ==We do performance, we do self-service, we do analytics==
Q.2.1.2	**Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?**
	PARTICIPANT: Yes it does because ==we can manipulate it==, like I said a lot of our ==development is done in house==. If we need something done we can do it ourselves and we can manipulate the system however which way we want to. ==It is not a frigid system==
Q.2.1.3	**Which of the HRIS modules are frequently used by your organisation?**

	PARTICIPANT: We use all of the models. Employee self-service is standard, analytics, performance we only use twice a year we changed the way our performance is done now, recruitment and selection.
	INTERVIEWER: Hmm
	PARTICIPANT: Benefits, like I said that is part of self-service and payroll obviously is daily.
Q.2.1.4	**Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not?**
	PARTICIPANT: [inaudible]
	INTERVIEWER: Sorry?
	PARTICIPANT: I said same as the previous question, we we manage the development and all that and update and upgrade it to the way we want it daily.
	INTERVIEWER: Is it daily?
	PARTICIPANT: So for example if you take a virus now
	INTERVIEWER: Ya
	PARTICIPANT: We use the system to to report on the virus to do all of those things and that gets done within a couple of days.
	INTERVIEWER: To report on the virus?
	PARTICIPANT: Ya so we do Coronavirus constantly on the system, it is part of our analytics, part of that.
Q.2.1.5	**How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so?**
	PARTICIPANT: So it used to be medium but I think it's moving towards high now because people are becoming, getting used to the uh benefits that were put in place for them. Like I said the information there is pretty up to date.
	INTERVIEWER: Okay nice
Q.2.1.6	**How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so?**
	PARTICIPANT: Medium moving up as well like I said [inaudible]
	INTERVIEWER: Sorry I didn't hear that the call is breaking up a bit.
	PARTICIPANT: Medium but it's moving up towards high because they getting used to the system now.
Q.2.1.7	**How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?**
	PARTICIPANT: Also medium moving up to high because the system is much more stable now and there is much more information as well and they using better now not just using it to view payslips and apply for leave.
	INTERVIEWER: Nice
	PARTICIPANT: There is a lot of new stuff that they can do on there.

	INTERVIEWER: Okay so it's more user friendly.
	PARTICIPANT: Ya
RSQ 2.2: How do organisations utilise HRISs during M&As to achieve the benefit thereof in the financial sector?	
Q.2.2.1	**Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?**
	PARTICIPANT: Yes, in terms of onboarding new employees onto the system as well as process automation and reporting capabilities.
Q.2.2.2	**What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?**
	PARTICIPANT: Usability and scalability across our businesses. PeopleSoft enables the business to facilitate workforce management, manage Human Resources and talent management to mention a few - on one central system.
Q.2.2.3	**Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?**
	PARTICIPANT: So we deal with them on a one on one basis. We are currently going through an acquisition now and we are busy integrating those employees into PeopleSoft at the moment. Like I said, you have your basic meetings to find out what the needs are of that business because when you do a section 14 transfer you can't just say that you must do what we want. You need to understand the company that you acquiring and what is happening there and how do we integrate that into our business so it's a one on one basis.
	INTERVIEWER: Okay
	PARTICIPANT: As it happens
Q.2.2.4	**Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?**
	PARTICIPANT: Yes like I said, the system works for us because we can manipulate and develop the way we want to so it's not a rigid system where you just have to accept what's there.
	INTERVIEWER: Okay
	PARTICIPANT: So
	INTERVIEWER: Sorry do you want to add another point?
	PARTICIPANT: No no
Q.2.2.5	**What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?**
	PARTICIPANT: Automation of more HR processes, improving the e-Learning module and potentially the integration of other systems.
	PARTICIPANT: [inaudible] **INTERVIEWER:** Sorry?
	PARTICIPANT: We maintain our own system

	INTERVIEWER: Ya but is there any uhm anything that you guys are planning on doing in the future with the system.
	PARTICIPANT: No we don't plan on changing it so maintenance wise, <mark>we maintain our own system. We do maintenance regularly</mark>, it's not that we do it as and when we need it.
Q.2.2.6	**What can assist you to overcome the integration challenges you are currently facing?**
	PARTICIPANT: I think the only challenge I'm facing is <mark>accessing accurate information</mark> – the <mark>information is only accurate when the right information is being captured</mark> on the system. We can definitely <mark>put in more restrictive fields when capturing information</mark>.
	INTERVIEWER: Okay
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?**
	PARTICIPANT: So like I explained to you when we did the merger and that we don't just go and and and jump into the whole thing. <mark>It's not a one year or two year project ours took quite a while to merge successfully to get everybody into the business</mark>.
	INTERVIEWER: So the planning aspect is, important
	PARTICIPANT: Ya <mark>you need to sit down and plan properly before you just go</mark>
Q.2.2.8	**What structures or processes should have been put in place to ensure a streamline integration process during the M&A?**
	PARTICIPANT: Like I said, I wasn't really involved with any technicalities so I can't answer.
	INTERVIEWER: Oh okay, no that's perfect. Okay perfect so we finished the questionnaire. Can you still hear me?
	PARTICIPANT: Ya
	INTERVIEWER: Thanks so much for meeting with me uhm I know I have been a pest for the past few weeks [Laughing] but I need to push to get this sorted.
	PARTICIPANT: [inaudible]
	INTERVIEWER: Hey?
	PARTICIPANT: I wish you all the best
	INTERVIEWER: Thank you
	PARTICIPANT: When are you finished
	INTERVIEWER: Uhm so I just have a few more interviews to go and then I can start doing a data analysis and then hopefully by the end of this year I will be finished.
	PARTICIPANT: Oh ok cool
	INTERVIEWER: Ya [laughing] fingers crossed

PARTICIPANT 2

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	

RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** Yes, so ==PeopleSoft==, and I'm just adding there because people don't always know that it is an ==oracle system==.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** Yes, because if I take a handful of five tea ladies or something I'm not going to count them in they are anyway contracted into the company so I'll say yes. **INTERVIEWER:** Uhm and then what level of access? **PARTICIPANT:** Regarding the level of access, I've said self-service and information regarding like their personal information and their benefits and their rem so everybody can use self-service, and everybody can check information. **INTERVIEWER:** But in terms of like an HR person they would obviously have more? **PARTICIPANT:** Yes, so I didn't say that here but I don't know if you want or if it's the right time to say it, but I mean we got obviously our whole ==security set up on the system which tells you what can you view, what can you edit, what can you read, ya so and that depends on your role.==
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** So, I'd say not specifically, the whole basis is that we are supposed to ==build a system intuitively enough that we don't need guidance it's like picking up your cellphone where you should be able to, even though you've got an upgraded phone, it should be similar enough to figure it out. We do have a user guide and sometimes the HR people or the line managers do help with the training but overall, no, no formal training.== **INTERVIEWER:** Do you think that it would be, uhm advisable to start implementing a formal training program for new starters? **PARTICIPANT:** In a digital world, maybe just ==taking the user guide and putting it onto some e-learning==. It ==could be useful==. And I can't even promise that, that doesn't exist because it could and I don't even know about it. [typing] **INTERVIEWER:** [Laughing] uhm Has there been lots of queries on how to use the system or is it fairly straightforward? **PARTICIPANT:** Well there is actually a ==help desk sitting in the Human Capital Enablement area== and they do ==get consistent queries but it's more when people are using a practice== like now they need to load their goals on Performance Excellence and they want to know how. So it's more ==around the seasonal usage of the system==. **INTERVIEWER:** And in terms of like in HR person, would you think that they would need uh training on the information system? Because of the type of work or type of role they are in. **PARTICIPANT:** That's interesting because I haven't thought about what you're saying now, because if you take something like an e-Learning module, we will probably need an employee one, a line manager one, and a HC or HR one. Ya and a payroll one because I mean those are different sorts of overall functionalities. So maybe, maybe, ya according to role.

Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** There is, so I don't have all the details on that but if you're meeting with [Name omitted], I don't know if he agreed to meet with you, he will give you all of that information but there is an absolutely rigorous system in place both inside of PeopleSoft and at every point of integration so PeopleSoft talks to People Analytics, it talks to the Payroll Qlikview, it talks to the Met retail commission systems at every integration point there is security and there's embedded security right throughout, antivirus and so on as well. INTERVIEWER: So it's quite intense? **PARTICIPANT:** Ya its really intensive, never say never but it would be hard to hack it **INTERVIEWER:** [Laughing] Has there ever been instances where it has been hacked? **PARTICIPANT:** No not really, the one loop whole maybe was somebody posted a whole lot of learning and development stuff and it went to all our brokers who are not, well they are not employees but it wasn't like people's personal data or anything. **INTERVIEWER:** Oh Okay, but then what did, was there any procedures in place that prevented something like that from happening? **PARTICIPANT:** Ya cause what happens is, we've got people on our system that are not employees like the brokers. **INTERVIEWER:** Yes **PARTICIPANT:** Uhm, and one has to be careful when you push something through your system, you only push certain things to your employees so just categorising it correctly and making sure the security was better in place.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A? So the factors are leadership, software and development, communication, change management, culture, employee turnover, performance appraisals and job satisfaction. Mention other factors that your organisation went through in HRIS implementation?** **PARTICIPANT:** I project managed about four different mergers, it was the [Name omitted] merger, from [Name omitted] we took a group of people back so I've done about four to five mergers. So ya, Company A and Company B was the biggest one but there's been a number since then. So, I would say, Leadership, Communication, Change Management, Culture. **INTERVIEWER:** Okay, then do you mind elaborating why you chose that? **PARTICIPANT:** So, so I will okay I want to add something as well here but I chose those because I think, so let me give you an example we brought in a company called [Name omitted], when we brought them in they, [Name omitted] is another one, they entrepreneurial, they vibey, they are young. We are over rigorous. Now we bringing them in and we're asking them whereas before they just sent a one liner email now they must go on and look for overtime and and and, and so they irritated by the cultural differences more than a system issue so I'm just saying that Leadership plays a role uhm to set a positive tone for those changes and the communication, change management culture that's why I say it's on that level. I never had a case where somebody doesn't know where to click the button. **INTERVIEWER:** Yes

	PARTICIPANT: <mark>It's more why should I have to because we come from a very entrepreneurial background.</mark> I also said in <mark>mention other factors,</mark> I also said <mark>transferring accurate data at the point of a merger so you could have ten thousand peoples records you got to bring over, so here's the practicalities - the practicalities are I have to freeze this at a point in time,</mark> I'm bringing your leave balance across, what if I'm bring it across back but today you've just put in 30 days leave and then now it doesn't come across on the system change. **INTERVIEWER:** Yes yes **PARTICIPANT:** Uhm, how do we make sure the data is accurate because we talk about different things so, we bring a company in for example, that is on a provident fund only and we bringing them in onto a pension now how do we accommodate that on our system and and the data is huge, how do we bring it across in a way that's secure because, I can't even, [Name omitted] again will tell you, it's something HT something something terminology that you have to dump it into this void and then you got to pull it from that void but not in the cloud because of security so he'll talk more about the security but I think <mark>the transferring of accurate data at a point in time and getting that data in a format that works, we struggle with that. So, we will go and say PeopleSoft needs it in this format in order to do an upload. We don't capture manually ten thousand records, so we need it in a certain format that and then they don't have it in that format.</mark> **INTERVIEWER:** So do you think that's one of the biggest issues, making that data speak to the systems that you're using? PARTICIPANT: Its one of the issues, ya.
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?** **PARTICIPANT:** I said I don't really think so, uhm I think the only thing it does <mark>mean in a large organisation is that you have to cater for a variety of needs.</mark> So we've got salary people, we've got weekly people, we've got temps, we've got contractors, we've got invoicing contractors, we've got brokers so if you want to go put something online, like okay you can now all go apply for [Name omitted], how does it make sure it doesn't go to our contractors, to our brokers, so I think <mark>the size just means that you've got to be more careful in catering for a variety of needs.</mark> **INTERVIEWER:** Okay [typing] but do you think that it, the one that you, PeopleSoft is effective for the size of the organisation now? **PARTICIPANT:** Yes, ya.
Q.1.1.7	**INTERVIEWER: Are there effective teamwork and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?** **PARTICIPANT:** I've said yes, I've said yes because it's a no brainer in a digital age. I think there's not one person questioning whether we need this, it's just h<mark>ow do we do it in a way that's user friendly enough to cater for needs</mark> so I'm just saying yes. <mark>There is a shared goal and we also all realise we need people data to make decisions even more so in a merger. I mean when Company B and Company A merged you had duplicated roles and how would we know if we couldn't pull a report saying that these are all the Human Capital people,</mark> or ya. **INTERVIEWER:** But do you think that the report, you can't pull reports from PeopleSoft hey? **PARTICIPANT:** <mark>No but Qlikview pulls reports from PeopleSoft</mark>

Q.1.1.8	INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?
	PARTICIPANT: So I'm saying its medium
	INTERVIEWER: Hmm
	PARTICIPANT: I think it works well and I do think there used to be right in the beginning a lot more complaints, I very seldom hear it now so I think there's medium trust in the system the only reason I don't say that it's high is there's always questions around data and you, yourself will know that but ya it's as good as the data that's put into it.
	INTERVIEWER: [Laughing] and what do you think they are doing to mitigate that, you know the inconsistent data?
	PARTICIPANT: I think we've gone back into a formally federated module where we said Company A deals with Company A's stuff and Company B must deal with Company B stuff, so I think each division, the HC head and the leader of that division needs to prioritise data clean ups.
	INTERVIEWER: Okay
	PARTICIPANT: Consistently but you can't have an organisation wide view on it, it's too big.
	INTERVIEWER: Hmm, that's true. So basically, the true source of the data will be sitting with the HC heads. Okay perfect [typing] Do you think they would implement something to kind of try to sort out this problem because I know the data issue is quite big when you doing dashboards.
	PARTICIPANT: I'm busy with that in Company A but I can't talk from a group point of view I'm sure that in all divisions there's something that's being looked at but I think that one of the projects that's underway is that we trying to get the information in our finance system to talk to the information in our HC system because what happens now is that you go to the group executive level and thee finance manager will say we've got 18 000 people and the HC manager will say we've got 17 000 people like what the hell. [Laughing]
	INTERVIEWER: [Laughing] Yea that's always the case
	PARTICIPANT: I think it's just understanding why there are differences you can't always align it
	INTERVIEWER: Hmm, there will always be differences
	PARTICIPANT: Ya
Q.1.1.9	INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?
	PARTICIPANT: Do you know I first said yes but I'm going to change it to No.
	INTERVIEWER: Okay?
	PARTICIPANT: So, I thought about it after I wrote it down cause I thought so Company A's culture was perfectionist, hierarchical uhh ethical to an extreme like you, you never really felt that they were going to screw a client you know, uhm very structured, very careful.
	INTERVIEWER: Hmm

PARTICIPANT: And Company B was innovative. They often called them cowboys, very fast paced, do it, get it out there, if you make a mistake, pull it back, fix it, get it back out. So, they would say they get something into the market, pull it back, fix it and get it back out while we are still thinking about it. So, there were two very different cultures. We tried to build a Group culture; I don't actually believe it ever worked.

INTERVIEWER: Do you still think there is a split between the two companies?

PARTICIPANT: There is still a split between the two companies, well they have now agreed on the split so there's a formal split that's why I talk about the federated model, they've gone back to say Company A go back to being Company A, Company B go and be Company B and let's just build so it's a yes and a no question because I think where we've got to was we've tried to amalgamate and try to create a new culture we didn't succeed. We actually dissipated both cultures and that's when we started losing money. So we went back to saying go back to being Company B, let's be Company B, go be the cowboys you need to be, Company A go be what you need to be in your market and lets just have some golden threads that runs throughout from a leadership perspective.

PARTICIPANT: Okay

INTERVIEWER: So, I think that was a, that's the decision the CEO made when he came in. I think it was a difficult decision and it's proven to be the right one. If you talk now, we no longer [Name omitted] we're now [Name omitted], Company B, Company A Holdings.

PARTICIPANT: Okay

INTERVIEWER: Instead of [Name omitted]

PARTICIPANT: But the companies are still merged in a sense?

PARTICIPANT: They're still merged, this is how I play it out in my own head, it's like we're divorced and living in the same house [laughing]. Like we've agreed to some rules that work, uhm but we are going back to being full whole independent businesses.

INTERVIEWER: So do you if the, if there was more emphasis on like building the culture or you know whatever it is, do you think that the companies would work together?

PARTICIPANT: Shew, we've tried hey and coming back to my marriage analogy, you need someone you're actually going to get on with to start with [laughing]

INTERVIEWER: [Laughing]

PARTICIPANT: These cultures were so far apart I almost wanna go and say it was not a good merger.

INTERVIEWER: Oh wow

PARTICIPANT: It's too far apart, I, I don't see any middle ground, our products are different, our markets are different, our style is different, our pricing models, everything is different so if there's one thing that did work is that we integrated our HC data.

INTERVIEWER: [Laughing]

PARTICIPANT: Which was actually quite a miracle

INTERVIEWER: Ya, oh wow okay what do you think the other reasons for the merger not working could be or was in your opinion?

PARTICIPANT: Uhm, I just said that we tried to blend the two cultures which diminished both of them uhm ya I think we should've done that from the beginning. I think we should've said we have two different businesses, which are in different markets, we keeping our own brand, we keeping our own identity, we are not trying to be one

	Company but we will leverage off each other you know, that would have been a better approach it would have made the merger work better.
	INTERVIEWER: I personally think that when companies merge, I don't think they should force the cultures on each other and try to create this one group culture because at Takealot like I've seen it, when Superbalist merged with Takealot.
	PARTICIPANT: That's a big merger.
	INTERVIEWER: That brand is young, it's laid back. Takealot is more fast paced, get things done and its constant clashes and people leave because of that because the culture.
	PARTICIPANT: I mean you either have to come together and you take the best of one culture, the best of the other and you create a third culture together using that so everybody feels their strengths have been brought in or you keep it separate.
	INTERVIEWER: Ya
	PARTICIPANT: But trying to be both is what doesn't work.
	INTERVIEWER: Ya, it doesn't work or trying to bring the one company you know merging into the other.
	PARTICIPANT: No that's a takeover then you will lose people.
	INTERVIEWER: And I think that's what it feels like in most cases.
	PARTICIPANT: Ya ya, and you lose some very good people in that process.
Q.1.1.10	**INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not?**
	PARTICIPANT: So I'm saying I think now it's fine now that we've said let each be our own brand and leverage off each other's traits. We should've done that from the beginning, it's the best thing we've done.
	INTERVIEWER: Okay, and then just after the merger happened, how was the culture?
	PARTICIPANT: Confusing, nobody knew what it was and a lot of people in Company A said that it was supposed to be a merger but it felt like a takeover. Company B took over Company A, Company B bought Company A so although it was said to be a merger, it felt like a takeover and I think people felt you should've then just taken us over and said it was a takeover and told us to be like you and we would've left. Company B culture dominated, it felt like that for most people.
	INTERVIEWER: Oh okay
	PARTICIPANT: Most of the top leaders were Company B, most of the Company A leaders, I think there's not even one here that was here post-merger.
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	**INTERVIEWER: What strategies should be put in place prior to M&A?**
	PARTICIPANT: I'm now going to talk more from a HC system perspective here because that's where our focus is right?
	INTERVIEWER: Yes, yes
	PARTICIPANT: I said that uhm HC systems should form, HC as a whole including systems should form part of the due diligence. So we go in and we check out a company

	like when we bought out part of [Name omitted] and we started a - short term insurance branch, uhm when we went in, they should have taken us with them because we could have influenced a whole lot of stuff. When we get data, how we freeze things, whether they come on our benefits. If they don't come on our benefits, we have to rewrite a whole system so and we did that a few times and I think it was a stupid decision we should've been involved right from the front and converted benefits upfront. I did that with [Name omitted]. It worked beautifully; it's the best merger we ever had. **INTERVIEWER:** Okay, so being involved in that initial **PARTICIPANT:** Upfront, so part of the due diligence, should we or should we not be buying this company and if we do what are the terms and conditions and not when we bought it they about to implement and suddenly they give us one month to get everything onto the system in a mess.
Q.1.2.2	**INTERVIEWER: What strategies should be put in place post-M&A?** **PARTICIPANT:** Alignment of terms and conditions of employment including benefits because what also happens and we've got it now with [Name omitted] and we've got it with [Name omitted] there's weird things we had to try to do to fit their benefits into ours, now you got to try and remember oh ya, an [Name omitted] person, if they were from [Name omitted], but now they've moved and they sitting in another whole department and then you have to remember that they are provident and not pension fund. **INTERVIEWER:** So kind of putting them on a general… **PARTICIPANT:** Ya, alignment so benefits and terms of conditions of employment as far as possible.
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?** **PARTICIPANT:** So PeopleSoft was used by Company A, [Name omitted] can tell you what was used by Company B I don't know, uhm it was quite a big deal because it felt like a takeover of Company B to Company A and it was quite a big deal that we got the system. **INTERVIEWER:** Oh okay, do you think that they used a different system? **PARTICIPANT:** Definitely, but I don't think it was a very advanced system so ours won, the Company A system but [Name omitted] can give you that he was here, I wasn't here when that happened. He actually managed that.
Q.1.2.4	**INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?** **PARTICIPANT:** I've got yes on all of those **INTERVIEWER:** And then why do you say so and what other strategies does your organisation accomplish? **PARTICIPANT:** So I've just listed other things that we've got on PeopleSoft that are not listed there so I said things like Performance Excellence, pre-onboarding, talent management, uhm ya.
Q.1.2.5	**INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?** **PARTICIPANT:** Uhm I've said it's adequate because I do think it's working, it's working better than a lot of other companies. Keeping that data up to date and correct is a consistent challenge.

Q.1.2.6	**INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?** **PARTICIPANT:** So again I will tell you that [Name omitted] can tell you a lot more there, I would just say yes there is a full security set up on who can access and see what uhm and the security of data and POPPI and all of those things are all built-in. **INTERVIEWER:** Okay so there weren't any breaches or anything in the past? **PARTICIPANT:** Not that I'm aware of hey, I mean there was a hack of all our systems about 3 or 4 years ago but I don't think we necessarily went into that because it wasn't just HR that was affected.

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?

Q.2.1.1	**INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics.** **What other modules does the HRIS have?** **PARTICIPANT:** Okay so there is payroll, there is no time management, there is benefit administration, there is recruitment and selection, there is performance. You have employee self-service but there is also manager self-service. There is also some BI capabilities but it's not within the HRIS but there is the ability for it. We make use of the analytical functionality in certain aspects of the BI capability but the majority of the analytics is done via Qlikview where we go through ETL process where we extract , transform and you load the data to a data warehouse, and then Qlikview is basically the presentation layer that is put on top of that data and then people with secure access can then slice and dice their data and make business decisions from an analytical point of view. So the other modules the HRIS has is a learning management system, so we have employee value proposition, we have the voice of the employee, that is just a few others that I could think of. However, these additional functionalities was not developed prior to the merger.
Q.2.1.2	**INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?** **PARTICIPANT:** Not at this moment in time. I feel that it is critical to have accurate people data and secure people data. I mean especially being in financial services, I suppose in any company but I mean we would be very vulnerable to people if they do hack, there is a lot of destruction you can do.
Q.2.1.3	**INTERVIEWER: Which of the HRIS modules are frequently used by your organisation?** **PARTICIPANT:** I said all of them. **INTERVIEWER:** All of them that was mentioned before? **PARTICIPANT:** Ya and the others that I've mentioned previously. I don't think there is anything that I see on the system that people don't use.
Q.2.1.4	**INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not?** **PARTICIPANT:** Ya, every couple of years. [Name omitted] again can tell you more. I ran a project where we did an upgrade to PeopleSoft version 9.2 in 2016 that was the last big upgrade that I am aware of.

	INTERVIEWER: But they obviously run something every day?
	PARTICIPANT: <mark>Yes, in terms of system maintenance—this is updated regularly</mark>.
Q.2.1.5	**INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so?**
	PARTICIPANT: <mark>Medium</mark>. You know I'm saying <mark>that it's a good system that enables a smooth workflow and provides people with data that we can use to make decisions</mark>. I mean I do think it enables the business. <mark>It does bring continuity like if a line manager leaves like in the good old days they would leave with forms in their case or something on their laptop so it does mean no matter who comes and goes there is a consistent record across the business.</mark>
Q.2.1.6	**INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so?**
	PARTICIPANT: So I've said <mark>medium</mark>, the reason I rate medium <mark>most of the way through is PeopleSoft 9.2 is not a leading edge system, PeopleSoft is not a leading edge system. It's a good system, it's a solid system but it's not going to blow the lights out so that's why I won't say high</mark>. But I <mark>said feedback overall is positive, but there are continuous requests for improvement</mark> as you yourself will know. Can this go on the system, can you pull that, can you make that Self-service, can you do that. So I've said <mark>system improvements are done via the agile methodology but every single two weeks something new is on the system.</mark>
	INTERVIEWER: Okay good so it's constantly improving.
	PARTICIPANT: Constantly
Q.2.1.7	**INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?**
	PARTICIPANT: I'd also say probably <mark>medium</mark>. So what I've said here is <mark>people have different needs, so you won't always please every single person uhm so overall people are satisfied</mark> and I want to just specify <mark>there particularly with the mobile, having info at your fingertips it really makes a difference</mark>, you somewhere and you need to show them your payslip.
**RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?**
Q.2.2.1	**INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?**
	PARTICIPANT: <mark>So I've said yes, particularly around being able to pull data like I said after a merger you've got a lot of decisions to make,</mark> are you structured correctly, there are two different structures in your company, two different sets of people. You got to pull role titles, <mark>you have to be able to extract accurate data and there is so much data that enables you to manage a merger so yes the HRIS was able to contribute effectively and efficiently.</mark>
Q.2.2.2	**INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?**
	PARTICIPANT: <mark>Data-enabling decision making and the automation of HR processes.</mark>
Q.2.2.3	**INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?**

	PARTICIPANT: Absolutely, please ask [Name omitted]. I don't really know, I just know that there are a lot of policies, guides, lots of frameworks not just as fat as I know specific to mergers and acquisitions that would apply as well. But I think he can give you more detail around that.
Q.2.2.4	**INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?** **PARTICIPANT:** Satisfied.
Q.2.2.5	**INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?** **PARTICIPANT:** I think the biggest drive is to push information to the front. So you know, in the past you would have to go and rely on one person and sit and find 15 000 position numbers or you got to go and ask your payroll for information so I think it's really to push information and workflow right to the front and to allow the employee and line managers to be as much in control as possible.
Q.2.2.6	**INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?** **PARTICIPANT:** So, I'm saying good change management like we are busy now with another merger and that stays as upper most.
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?** **PARTICIPANT:** So I might be repeating something that I've said before but I think HR to be part of the merger and acquisition discussions up front and where possible to consider benefit alignment upfront so we don't have to customise because what happens is we have to customise the entire system then we go a year later through an integration then all that work that we've customised doesn't matter now we buying another Company And we got to start customising again it is a waste of energy.
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** **PARTICIPANT:** Again, just more focus on the change management. I really think from a system perspective we did the right stuff. One other thing, and I don't know where it goes so I'll just say it and you can think where to capture it. The one other thing I want to say is, we formed with [Name omitted] which is an example of a very good merger from a, from this perspective. We've formed a guiding coalition so I had their MD on board and he came to all the meetings, MD or not he came to every single meeting, I had their financial director on board, I had their Human Capital person onboard and the same on our side, not our MD but the right people on our side so that when we met we could actually make decisions so if I'm coming in saying can we please align and we take away this out of you pension fund and put that in and this is the legal implications and the MD could think it all through and go yes. Whereas before, it was done via a committee with no decision making, so that really helps. Getting the right people to form part of the meeting to discuss. **INTERVIEWER:** Okay perfect, so I think we've covered everything. I will send you a copy of the responses and things when I complete it. **PARTICIPANT:** It would be interesting to see, thank you, take care. **INTERVIEWER:** Thank you, I'll see you soon.

PARTICIPANT 3

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** Yes, Oracle PeopleSoft.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** Yes but it is dependent on your role within the organisation. For example, HR would have a different level of access to that of an employee - having the ability to view payslips, confidential information whereas an employee would have access to ESS.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** We don't have a formal training programme. We have developed the system to be very intuitive over the years so that little to no training is needed. I know that in some areas within the business HR would usually introduce the system to new employees with regards to navigation of the system.
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** Yes, all information that is stored on the HRIS is safeguarded. We have an in-house People Soft team that will conduct testing etc to prevent any hacking. The data is housed behind firewalls, and we have various controls in place to safeguard the information.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A?** **PARTICIPANT:** I would say yes to all. Leadership is important in terms of ensuring that the entire merger and acquisition runs smoothly, software and development, having a strategy in place to mitigate any risks, change management is probably one of the most important regarding having a plan in place for all the changes, from communicating to the business, ensuring roles and responsibilities are assigned, identifying relevant stakeholders, etc. The culture has also been impacted because we had two different cultures merging together. Uhm, employee turnover was also impacted where some jobs became redundant and then performance appraisals in terms of KPI's changing as business needs change and then finally job satisfaction is important because this impacts things such as performance, a merger would in some cases rock existing culture and norms, working conditions and morale. So, I believe that it was affected in terms of uncertainty, changes in management as well as the fear of downsizing and potential losing jobs.
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?**

	PARTICIPANT: In my opinion I do not feel that size matters. If you get the basics right in terms of business requirements and the system can provide this then you are able to deliver what the business needs.
Q.1.1.7	**INTERVIEWER: Are there effective teamwork and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?** **PARTICIPANT:** Yes, there was effective teamwork. Each team member knew exactly what was expected of them and what role they needed to play.
Q.1.1.8	**INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?** **PARTICIPANT:** Yes, I would rate this as medium as there would always be room for improvement.
Q.1.1.9	**INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?** **PARTICIPANT:** I don't think that a new culture emerged immediately, there were still two separate cultures, and we are trying to create a unified culture with some aspects of each.
Q.1.1.10	**INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not?** **PARTICIPANT:** A completely new culture has not yet emerged. I feel like there are still certain silos of cultures scattered in the business.
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	**INTERVIEWER: What strategies should be put in place prior to M&A?** **PARTICIPANT:** HR and IT to be involved as soon as there are discussions around merging and creating a change management plan as well as an IT integration plan.
Q.1.2.2	**INTERVIEWER: What strategies should be put in place post-M&A?** **PARTICIPANT:** I guess ensuring that all the boxes were ticked, all the employees are successfully integrated into the business and ya.
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?** **PARTICIPANT:** PeopleSoft was used and Oracle EBS.
Q.1.2.4	**INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?** **PARTICIPANT:** Yes, to all. The other strategies are onboarding, succession planning, performance management and learning and development.
Q.1.2.5	**INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?** **PARTICIPANT:** I would say that it could be more effective. We always face the risk of data being inputted incorrectly. **INTERVIEWER:** Okay perfect

Q.1.2.6	**INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?** **PARTICIPANT:** Yes, so when we migrate the data from the previous system to PeopleSoft it was done in a manner with high security.
RQ2: How can the HRIS be utilised to achieve organisational success during M&A?	
RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?	
Q.2.1.1	**INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics.** **What other modules does the HRIS have?** **PARTICIPANT:** All of the modules except Time Management. The analytics module is not within PeopleSoft itself but we use a plug-in called Qlikview for data visualisation and reporting purposes. **INTERVIEWER:** Great
Q.2.1.2	**INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?** **PARTICIPANT:** Yes, it provides the business with the tools needed to conduct various processes although we are always trying to improve the system to be abreast with technological changes such as AI etc.
Q.2.1.3	**INTERVIEWER: Which of the HRIS modules are frequently used by your organisation?** **PARTICIPANT:** So, I'd say ESS, Payroll, benefit administration and recruitment. The other modules are used when the need arises for example Performance reviews will be used once a year. **INTERVIEWER:** Okay
Q.2.1.4	**INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not?** **PARTICIPANT:** We upgrade as often as possible and when business requires. Uhm our inhouse PeopleSoft team always ensures that the system is where it needs to be.
Q.2.1.5	**INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so?** **PARTICIPANT:** High, we enable the business to be able to have a system that is user friendly and to assist with smooth HR processes.
Q.2.1.6	**INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so?** **PARTICIPANT:** High, the system is designed to do what it needs to do. I'm sure there are a handful of managers that don't really take the time to understand the full functionality of the system but those who do can uh understand like I said previously that the system is very intuitive. **INTERVIEWER:** Perfect, [Coughing] Excuse me, uhm next question

Q.2.1.7	INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?
	PARTICIPANT: I would say high. I think a few years ago, people were not very keen on using the system because it was very complicated, so we have designed the system to be so user friendly that no training is required. We have created a mobile version so that employees can access payslips and apply for leave on the go and I think that this was when lots of employees started using the system on a regular basis.
	INTERVIEWER: That's so cool! Okay moving on
RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?	
Q.2.2.1	INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?
	PARTICIPANT: Yes - I don't recall my department's efficiency and effectiveness being impacted during the merger.
Q.2.2.2	INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?
	PARTICIPANT: Generally, I feel that the HRIS enhanced employee engagement because employees now had the opportunity and information at their fingertips instead of going through various channels to get the information that they needed. The system also provided accurate data which assisted the organisation to make informed business decisions, being able to keep data in one place, reducing human error and just streamlining all HR processes to make work quick and simple.
	INTERVIEWER: Nice, next question
Q.2.2.3	INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?
	PARTICIPANT: I don't think there is a formal framework in place.
Q.2.2.4	INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?
	PARTICIPANT: Yes, the system is built around what the business needs at a given moment in time but there are lots of improvements to be made to have a more streamlined system.
Q.2.2.5	INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?
	PARTICIPANT: Possibly adopting new technologies, creating API's to different systems to enhance our current HRIS system. I think also potentially looking at artificial intelligence and ensuring all processes are efficient and effective.
Q.2.2.6	INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?
	PARTICIPANT: So uh change adoption, something that is not often spoken about. It is how you can change working in the organisation and how you get a better technology adoption. There are a lot of fancy HR technologies, but people don't use half the functionality. If you look at your cell phone you only use 10% of the features on there and you got all these apps you downloaded and you only use 5% of the apps, you know what I mean?

	INTERVIEWER: Ya, that's true
	PARTICIPANT: The trick is to have the apps that people use a lot and adopt that - all the other stuff will be in the periphery, and they will access it when they want to sort of thing. So, if you look at Willowbridge mall, your main attractions are Pick n' Pay and Woolworths. When you come to Woolworths, what happens? You walk out and you see @home, you see the Sushibox, you see this, you see that, you go to all the little shops. But you have got to have your anchor in the HRIS. If that works well, then all the little shops within the HRIS will fall into place.
	INTERVIEWER: Okay, perfect
	PARTICIPANT: So, change and adoption is what I think is really really key and what can assist you with challenges. We invest in it, it costs money to change management and to spend time to get people to adopt something. The adoption cost is the IT cost and what is the human cost in adopting an IT project.
	INTERVIEWER: So cost aside, one needs to be focusing on adoption and change?
	PARTICIPANT: Yes, very important
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?**
	PARTICIPANT: Change and adoption, spending some money on change management which will drive better adoption.
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?**
	PARTICIPANT: We work much more collaboratively. We are part of the merger project team. HR is always the last to be involved, even with the payroll. Get your HR IT people in early on the merger team. So 3 to 4 months before the merger actually happens. So when day one comes we've done change adoption, they're on the system etc. We've done data discrepancies, is another key thing you know – we have 5 levels in our structure and you've got 10 levels in your structure, what is a senior manager here, what's a transitional leadership role there, how do the two link
	INTERVIEWER: Job families
	PARTICIPANT: That's it, and can you build what you call a correlation table between what they have and what we have. Then you build a common language, a correlation language so our thing of senior manager equals your thing of this.

PARTICIPANT 4

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** Yes, it's Oracle PeopleSoft. **INTERVIEWER:** Okay perfect
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** Okay so yes they do have and they have access via desktop and via mobile. They obviously have access to their own personal information only (employees) and then managers can see a bit more and then you have super users that have more access. So depending on your access you can see different information/functionalities. **INTERVIEWER:** Okay, does the level of access depend on the position within the company? **PARTICIPANT:** Ya, it depends on your role, definitely on your role.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** So, the answer is yes, as part of the onboarding process there is some sort of training people get. We tried to develop the system so that it's super easy to use, so no training is really required. For example, if Facebook updates their app, they don't give people training so we sort of follow the same approach. **INTERVIEWER:** Cool
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** So yes there is, the information is definitely safeguarded. You can only access the system with a secure username and password. We do lots of security with SSL encryption. The data is behind a firewall so the IT security team will look at possible hacks so there are lots of controls and things like that. **INTERVIEWER:** Perfect
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A?** **PARTICIPANT:** According to me all of those factors in some way or the other play a role during the merger and acquisition. If leadership doesn't make it possible for you to get certain things that are required, then it will be challenging. If you don't have a proper software development implementation strategy in place whether it is agile or a waterfall method or whichever method the people want to use then that can have an impact. If there is not proper communication, we all know what can happen if people don't communicate effectively. Change management is something that we lack but is very important and culture change. Employee turnover and performance appraisals if someone is not happy with their appraisal which might also impact the merger and

	acquisition. Job satisfaction is not just applicable to a merger and acquisition but it does impact there as well. **INTERVIEWER:** Okay perfect **PARTICIPANT:** So I would say all of them, yes. **INTERVIEWER:** Okay
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?** **PARTICIPANT:** Ok, so I said no the size does not matter. It all depends on the practice required so whether you do something for two employees or five hundred employees it's the same work that is just my opinion. Obviously, the numbers add a bit more complexity but in terms of what you need to deliver and depending on what your requirements are whether it's two or thousands of employees, it's the same.
Q.1.1.7	**INTERVIEWER: Are there effective team work and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?** **PARTICIPANT:** So in my notes I wrote yes, we follow an agile approach where there is clear guidelines involved and responsibilities as well as what will be prioritise. We know exactly what we need to focus on so from that perspective we know exactly at a given point in time what it is that we need to deliver on.
Q.1.1.8	**INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?** **PARTICIPANT:** I think that in terms of usage and performance its high bearing in mind the other things they could not be satisfied with but with any system there is always something. The next person might have a different response. **INTERVIEWER:** What are some of the things that they aren't really happy about currently? **PARTICIPANT:** So at the moment where we stand with the system itself is that we are great with providing capabilities by administering a practice. If we take Performance Excellence for example, it is great because people (employees) can go and capture their goals on the system, they can do their ratings, they can do peer reviews etc but when it comes to the visualisation of the transactions when we need to give the practice owners or the manager a comprehensive report is where we are lacking I would say. **INTERVIEWER:** Okay perfect, are you guys planning on improving that or what kind of things are you guys going to put in place? **PARTICIPANT:** We have plans to improve but that is under construction, so we know what we want to do. It just needs to get prioritised going through the architecture to actually put us in a position to, to, to, you know, address that issue. **INTERVIEWER:** Okay
Q.1.1.9	**INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?** **PARTICIPANT:** So I would say in terms of the merger there were definitely two different cultures but the dominant culture always dominants but in some cases you do see pockets where in big teams they still have their culture but overall the most dominant culture will be dominant and that is a clan culture.

Q.1.1.10	INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not? PARTICIPANT: Of the? INTERVIEWER: Of the new culture? PARTICIPANT: I didn't write a response, So, like I said there are pockets that still have their own culture. If I look at my team we are not necessary, we did not necessary change our culture and our behaviour based on the merger but it kinder is tough when you need to integrate with other third parties within the business when they have that adopted culture so it's difficult to be part of the clan for instance if you not part of the clan then that makes it tough so you first need to go through a number of hoops or you somehow need to prove yourself that you are worthy to be part of or before they allow you to be part of that clan but ya you get used to it. INTERVIEWER: Okay perfect PARTICIPANT: I suppose maybe in a way we do the same
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	INTERVIEWER: What strategies should be put in place prior to M&A? PARTICIPANT: Ok so when you say strategies, which strategies are you referring to because to me that's kind of open ended. I mean you can speak about shareholders, you can speak about the take on of the employee data, the collaboration between the different entities that you are either merging with or acquiring so it's kind of difficult for me to answer that. INTERVIEWER: So if you look at the strategic question which states what strategies has the organisation used in HRIS integration during mergers and acquisitions so in terms of strategies. PARTICIPANT: Of the HRIS? INTERVIEWER: Ya in terms of integration PARTICIPANT: So I think ya, so I think in the past when there were mergers and acquisitions we shouldn't find out at the last minute, okay so this is now happening and so our priorities now need to shift because now there's this merger and acquisition that is taking place. So now we have put in place a process, that we are involved in the process in advance not waiting until you know, all the due diligence and approvals have been met so we can sort of plan before the time to make sure that we can then plan and prioritise work that comes with the merger. INTERVIEWER: Okay [coughing]
Q.1.2.2	INTERVIEWER: What strategies should be put in place post-M&A? PARTICIPANT: I think ya, so that's sort of an ongoing thing, Post-merger – so now that the people have been integrated to the HRIS but then maybe they will have new business requirements but that then follows a different approach because now post the migration to the HRIS we only take in work from those process owners because they sort of manage a practice. INTERVIEWER: Okay PARTICIPANT: So I don't necessarily have an answer but maybe the process owners need to speak to the relevant parties in that acquired company or whatever the case may be to develop a new business process going forward. Maybe something like that I would say.

	INTERVIEWER: So it's more like maintenance and updating current strategies?
	PARTICIPANT: Yes
	INTERVIEWER: Okay
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?**
	PARTICIPANT: PeopleSoft was used previously, and the other companies' data was administered with FNB. The system was Oracle EBS. E-business Suite.
	INTERVIEWER: Okay, next question
Q.1.2.4	**INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?**
	PARTICIPANT: Okay so it's yes for all of that but it's also other practices as well so I mentioned Performance Excellence, uhm role profiling should be on there, onboarding, succession planning, personal development plan. The whole HR life cycle – when the employee starts with the company until they leave.
Q.1.2.5	**INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?**
	PARTICIPANT: [Inaudible] Again this is my opinion - it is very effective because all capturing is monitored through our case management system with SLA's that are linked to them so when there are things that need to be done it gets logged with an SLA it gets routed to the appropriate administrator or the person that basically needs to fulfil the request, they then have a certain timeline.
	INTERVIEWER: Hmm mmm
	PARTICIPANT: Then we have audit reports and stuff that gets checked as well specifically from a payroll point of view so if we look at the last stats we had a 99.99% almost six sigma results with regards to accuracy. So, there is some stuff that creeps through but it's very limited.
	INTERVIEWER: What case management system are you using?
	PARTICIPANT: We use PeopleTrax – a local vender has developed it and it is integrated into the HRIS.
	INTERVIEWER: Okay cool
Q.1.2.6	**INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?**
	PARTICIPANT: I said yes, the integration of FNB data to us (PeopleSoft) at the time a big emphasis was made on securing the data so when the data was transferred it was done in a secure manner with little eyes on the data so only specific people with access were allowed to view and from there it was disseminated to the people who needed to migrate it to PeopleSoft.
RQ2: How can the HRIS be utilised to achieve organisational success during M&A?	
RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?	

Q.2.1.1	**INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics.** **What other modules does the HRIS have?** **PARTICIPANT:** Okay so there is payroll, there is no time management, there is benefit administration, there is recruitment and selection, there is performance. You have employee self-service but there is also manager self-service. There are also some BI capabilities so it's not within the HRIS but there is the ability for it. **INTERVIEWER:** So on PeopleSoft there is a BI aspect but you don't make use of it? **PARTICIPANT:** We make use of it in certain aspects of the BI capability but the majority of it is done via Qlikview where we go through ETL process where we extract , transform and you load the data to a data warehouse, and then Qlikview is basically the presentation layer that is put on top of that data and then people with secure access can then slice and dice their data and make business decisions from an analytical point of view. So, the other modules the HRIS has is a learning management system, so we have employee value proposition, we have the voice of the employee, that is just a few others that I could think of. However, these additional functionalities were not developed prior to the merger. **INTERVIEWER:** Okay, perfect, thank you.
Q.2.1.2	**INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?** **PARTICIPANT:** My answer there was yes so depending on what it is the modules are either configured to the way that the practice owner required or developed according to their specifications. So I would say that it speaks to the business requirements. But if business requirements change, we would need to configure the system to meet those requirements. **INTERVIEWER:** Okay
Q.2.1.3	**INTERVIEWER: Which of the HRIS modules are frequently used by your organisation?** **PARTICIPANT:** Some of them are just used annually, if we look at the annual increase process - that will be used once a year. If I look at Performance excellence towards the end of the year there is a sort of a spike where that is concerned but that's a really difficult one to answer hey. I mean payroll definitely, every month. Leave applications are daily, viewing of payslips are used frequently. I would say definitely time dependent but it's really tough to answer that one.
Q.2.1.4	**INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not?** **PARTICIPANT:** So the answer there is yes as often as possible. So the HRIS that we have actually comes with two sides so there's the uhm functionality part, where this is the functionality where we give the community but then there's also a tools part so as technology progresses with either artificial intelligence or you mentioned analytics and and and [Beeping sound], so the technology offer that Oracle gives enables users to make use of those capabilities so we can do that upgrades to the system from the functionality. So we definitely do upgrade as often as possible.
Q.2.1.5	**INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so?**

	PARTICIPANT: I say <mark>high</mark> because <mark>we only deliver on what the business wants</mark>. So, I would say <mark>yes it enables the business to basically do what they need to from a HR point of view.</mark>
Q.2.1.6	**INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so?** **PARTICIPANT:** So, this is my biased answer so I'm going to say <mark>high</mark> but if you ask maybe somebody else, they would say low or the next one might say medium but in my opinion I would say high. **INTERVIEWER:** Why do you say so? **PARTICIPANT:** Because again, <mark>we deliver on what the practice owners want</mark>. So the norm is if the people blame the system but I don't think that it's the system because the system does what the business wants and how they want it so if there is an issue then they always blame the system so maybe it's the practice and not the system. **INTERVIEWER:** That's a different way of looking at it [laughing]. **PARTICIPANT:** Ya, [laughing] <mark>we just develop what the process owners want</mark>.
Q.2.1.7	**INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?** **PARTICIPANT:** <mark>In general with the merger and acquisition there was a lot of uncertainty, doubt and negativity in one company. If I look at the other company the whole merger went our way where we kept People Soft and we integrated within the group so our experience is different with how it affected us. So it depends on how you were affected by the merger or the acquisition.</mark> <mark>So for my team I would say it's high</mark>, for <mark>other teams it might be lower, depending on how they were impacted.</mark> **INTERVIEWER:** Okay perfect
RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?	
Q.2.2.1	**INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?** **PARTICIPANT:** Yes so <mark>we were one of the first to be over the line with regards to the merger with getting the people onboard and paying them from one central system</mark>. So, from the HRIS perspective we were then obviously able to provide consolidated reporting with regards to employee expenses and where they were situated. But at the time the company still had two different financial systems so from an expert's point of view we could say it's on the system but from a financial system it didn't necessarily go the way that it should so it's kind of a tough one to answer because now you had different journal postings but when it came to headcount reports and those kinds of things, we consolidated it easily. **INTERVIEWER:** And is it one (financial) system now. **PARTICIPANT:** Yes **INTERVIEWER:** How long did that take for them to have one system? **PARTICIPANT:** I can't even remember. They did JDE migration where they consolidated accounts and cost centres from each company to have one set of journals. That was a couple years ago. In my opinion it went smoothly.

Q.2.2.2	**INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?** **PARTICIPANT:** okay so I would say definitely many benefits so the one big thing is obviously that there is one version of the truth, you have one HRIS system which is the authoritative source so people can't say that your data is wrong because we administer all employee data and the aspects that goes around it so the data that we in-house is factual so people can literally come to one source for their information so that is a benefit of having it consolidated. **INTERVIEWER:** Okay moving on
Q.2.2.3	**INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?** **PARTICIPANT:** So when you say policy and guidelines do you speak like a leave policy or do you specifically speak about the HRIS maintenance? **INTERVIEWER:** Ya so, uhm when the merger happened you know, was there anything that, was there a framework that uhm the company worked from to effectively integrate the system? **PARTICIPANT:** Okay I'm just thinking, so from an architectural point of view obviously we've done the architecture to make sure from the system point of view that the system has high availability in place with regards to the data and how it got there. It's a difficult question to answer because you can use different methods to basically fulfil the same thing. I would say at the time when we did it we obviously used the most effective one that would get the job done the quickest, the most accurate, 100% correct. So we used the method that was most effective. So you need to look at your resources and the skills of your employees before choosing a method that will be quicker. Those are all contributing factors. **INTERVIEWER:** Was there a formal framework or document? **PARTICIPANT:** So we had a project plan with specific tasks and who was responsible for the tasks so that was the guideline. We definitely had a scoping session where all of the tasks were identified that we needed to solve for and what that entailed so if you take the project plan as a document then it's a yes.
Q.2.2.4	**INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?** **PARTICIPANT:** I am satisfied because without the system I won't have a job [Laughing]. **INTERVIEWER:** [Laughing] Does it do the job for the business? **PARTICIPANT:** Same response to the previous question so we don't give business functionality that we think they need we develop and configure based on their needs so they basically tell us how and what they want. So I would say yes.
Q.2.2.5	**INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?** **PARTICIPANT:** So, I think the way that things are going is things must be able to be done in a simple matter/way. You don't want to have these busy screens or overload of information so the word that they use here is to dumb it down. **INTERVIEWER:** [Laughing] **PARTICIPANT:** Uhm, like less is more so minimal information that is only required to fulfil the task and then obviously adopting the new capabilities and technologies like artificial intelligence and ensuring process efficiencies are in place and maybe if I have

	to say possible code people out of work because if you ==automate stuff with making use of robotics== or whatever then maybe that is what they want because ==from a cost perspective it would make more sense for a robot to do something rather than having 50 people doing it== so maybe that will be an expectation.
Q.2.2.6	**INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?** **PARTICIPANT:** [Long pause] Ya so just sometimes when things, ==when business requires something that maybe from top down, they need to push that because if you try to do it from the bottom up then it kind of makes it difficult. So, get the buy-in from the guy on top.== They essentially want that piece of integration so they can drive it from the top down. ==The other stuff is all technology stuff where you maybe struggle to get something configured but that is normal stuff it's not major.==
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?** **PARTICIPANT:** ==Involve HR/IT team from the start. The sooner we know, the better we can plan, we can prioritise.== ==HR/IT to be part of merger related discussions but just communication needs to happen early not when the merger is done.== **INTERVIEWER:** Okay so we're moving onto the last questions.
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** **PARTICIPANT:** Initially the issue that we had was that one company did not have their own HRIS system – their data was managed with FNB. so you know how tight and secure banks are with data etc. so that was a challenge where ==we needed to get the appropriate approval and access== from FNB perspective to actually go to their offices and sit with their developers ==and the people that need to provide us with that data== etc., etc., but once those hurdles were removed everything else from there sort of... it's just the normal technical stuff, what does this mean blah blah blah but I would definitely say those things that I've mentioned with FNB. **INTERVIEWER:** So, it was streamlined integration besides that? **PARTICIPANT:** Ya we had 100% success rate when we paid the employees from company 1 via PeopleSoft, we had no issues. **INTERVIEWER:** So that concludes our interview, thank you so much for meeting with me. **PARTICIPANT:** Your welcome.

PARTICIPANT 5

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** We make use of PeopleSoft. We used E-business Suite prior to the merger.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** Yes, they do but it's obviously dependent on the usage of the system so employees will have access to their profile only and then like managers will have access to their employees' profiles and themselves and then you have the backend users which will be like the payroll people uhm like HR, the HR business partners, and then some divisional heads.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** Yes, definitely especially with the new starters so if they need to come in and obviously they are going to be utilising the system there is some sort of formal training that uhm gets rolled out for them by their respective line manager uhm alternatively it can be done by uhm the systems administrators who are responsible for maintaining the system - this will be more of a support team. **INTERVIEWER:** Okay, next question
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** Uhmmm in terms of making sure the data remains secure? **INTERVIEWER:** Yes **PARTICIPANT:** So there are obviously certain things like payroll information would be restricted and only be accessed once you have a password and there are only certain people that will have that access. Or if it is not password operated, access is restricted to the back end. So, for example if you are a divisional head for BI and you uhm want access to employee information you won't be able to see the information of uhm another division only your division if that makes sense.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A?** **PARTICIPANT:** Yes definitely, we were not using People Soft prior to the merger so there were a lot of things that you know came into play like unfamiliarity regarding the system itself uh and that caused obviously a lot of frustration and conflict uhm and with the two companies merging we obviously impacted the culture itself because there was a confusion and in saying that it obviously impacted employee turnover you had a lot of individuals leaving the organisation uhm I guess that the reason why they've also left was because of the lack of transparency uhm in terms of communication. So, there was a lot of factors came into play but from an HRIS perspective, I think what really stood out was the lack of integration so yes the one company was able to utilise People Soft and get

their work done <mark>whereas the other company they were not quite familiar with the system and it caused a lot of frustration</mark> uhm on their end.

INTERVIEWER: So, is it yes to all the factors?

PARTICIPANT: No so it will be <mark>Job satisfaction, communication, leadership and culture,</mark> uhm I think that's about it high level.

INTERVIEWER: Okay, next question

Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?** **PARTICIPANT:** Definitely, because <mark>with the organisation merging it obviously expanded in terms of head count</mark> etc and <mark>to create some structure and to easily</mark> uhm <mark>make data-driven decisions by just referring to the system to extract that information</mark> uhm it has made like a huge impact in terms of operations so obviously meaning that it was effective and then also like I mentioned just <mark>to organise the data itself and making sure that it is hosted and readily available when required as opposed to if there had to be no system in place you know everything would have been all over the show it would have taken forever for an organisation or for managers to make decisions because they don't have the information at their disposal</mark> uhm ya.
Q.1.1.7	**INTERVIEWER: Are there effective teamwork and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?** **PARTICIPANT:** Can you repeat that question again sorry? **INTERVIEWER:** [Repeats question] **PARTICIPANT:** Uhm I don't know if I understand your question correctly but I'm going to answer and you can just guide me. **INTERVIEWER:** Okay **PARTICIPANT:** So uhm the support that was offered in terms of the implementation is what you referring to? **INTERVIEWER:** Ya so basically like this question stems from what are the factors influencing the effective integration of HRIS during mergers and acquisitions. So, during the merger and acquisition, was there effective teamwork and staff participation to support the implementation process from one company to the other. **PARTICIPANT:** Ya so on one end so its two companies coming together and merging its not an acquisition right. So <mark>with the integration of the two companies what I have experienced was that from the one end well the one organisation was like keen and they had some change management plan in place</mark> etc. and they've had like team players that ran with <mark>making sure that everyone was trained etc.</mark> so on this system itself <mark>whereas the other organisation not so much.</mark> So <mark>holistically no</mark> but <mark>if I have to single out an organisation I'd say yes there were things in place to make sure things were supported in terms of the implementation process from the system.</mark> **INTERVIEWER:** Okay uh, the next question
Q.1.1.8	**INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?**

	PARTICIPANT: Uhm at this point in time I'll rate at medium considering everyone has not yet been fully exposed to the system so managers only use certain functionalities like checking employee profiles looking at grades etc. but if managers get more exposure in terms of what the system can enable them to do then I guess it will probably be ranked from medium to high uhm but at this stage I will rate it medium.
Q.1.1.9	**INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?** **PARTICIPANT:** Uhm so after the merger like there were still what's commonly known as uhm operating in silos so at this stage I can't really say if there is a new culture so everyone is still like set in their ways and uhm in terms of the culture itself you can see that the only way we are going to start seeing what the culture is currently is by bringing in new employees so then making sure that we introduce them to the new culture. But the employees that came from the previous organisations - they are still set in their ways and I won't say that it has presented a new culture it's more of like Confucianism. Like there are two cultures, do you understand? It's not like really one mutual culture. But I guess in the next few years or so we will have most of the older individuals no longer working there and the new people coming in then only you can reiterate or re emphasise what the new culture is like or should be like. **INTERVIEWER:** Okay so then the next question.
Q.1.1.10	**INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not?** **PARTICIPANT:** Like I said there isn't really a new culture. **INTERVIEWER:** Okay so then the next question.
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	**INTERVIEWER: What strategies should be put in place prior to M&A?** **PARTICIPANT:** So strategies that needs to be put in place is in my view in terms of - besides from just the whole system integration part but I think a change management plan should definitely be devised first of all and break it down and say look at this stage we will make sure that everyone is aligned to the new culture, at this date we will give everyone training on uhm the particular system. So the mistake that they've made was people came in right and some of them were familiar with the system and some not and they built on that instead of taking everyone fresh and taking everyone as new beginners pertaining to the system, to the culture and uhm not just build on to what one company currently has. So I definitely I'd say that, or the intervention that should have been done before the implementation of the merge is like a clear, concrete change management plan and uh having like a uh task team that drives that change management plan.
Q.1.2.2	**INTERVIEWER: What strategies should be put in place post-M&A?** **PARTICIPANT:** Post-merger – so from an OD perspective with what needs to be done is - so you have obviously first doing your research and then coming with the change which is the merge itself and then post that you need to do an evaluation and roll out and evaluation strategy to see what was you know the barriers, where are they falling short, what worked, what didn't work so it should be a continuous cycle and not just stop there and uhm kind of understand what are the roadblocks and what are we going to do to address those roadblocks. So definitely evaluation like strategies and rolling out initiatives to address the barriers that hinder us from achieving you know our ultimate vision and goal with the merger and also to prepare us for future mergers.
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?**

	PARTICIPANT: I know that one company was using PeopleSoft and the other was hosting their data through a third-party business and the system used was EBS.
Q.1.2.4	**INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?** **PARTICIPANT:** So, moving into an age where we need to be making data-driven decisions has assisted the organisation in making informed decisions and establishing certain metrics to ensure that we can make decisions and spend money based on the data that we have at our disposal, so I think in that regard the HRIS has made things much more effective from an HR perspective and obviously if you get the basics right in terms of the metrics for HR process you can clearly see the impact that HR has in terms of the achievement for business objectives - so yes to all.
Q.1.2.5	**INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?** **PARTICIPANT:** So we have system administrators and analysts so they deal with working on the system if you need complex reports etc. Uhm which is more for management or HR because I guess employees won't really need reports unless it's for like for leave viewing purposes. Uhm so, it has been very effective in that regard considering that we have designated people at hand uhm in terms of capturing information. So, we have a case management system which is linked to PeopleSoft - queries will be logged and routed to an administrator with an SLA so any information that is inputted will be vetted for accuracy. And then extraction of information - obviously what you put into the system is exactly what you get out but if there are any anomalies identified they normally uhm have it rectified immediately.
Q.1.2.6	**INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?** **PARTICIPANT:** So, the HRIS system itself won't tell you that you are not allowed to share this information. What we normally do from an HR perspective is that we make individuals that utilises the system and that may accidentally be exposed to confidential information we have them sign what's called a confidentiality agreement so anyone that is exposed to confidential information uhm they will be faced with disciplinary action uhm so it's not like a physical form that gets sent out but more like a disclaimer. Before they use the system of sign up there's like T's and C's that apply. So yes, there are different levels of access per user and each user has their own secured username and password.

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?

Q.2.1.1	**INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics.** **What other modules does the HRIS have?** **PARTICIPANT:** Can you just repeat that question again please? **INTERVIEWER:** [Repeats question] **PARTICIPANT:** All the above, except for time management because that is obviously done by biometric systems or the tracking of line managers. PeopleSoft is not linked to our biometrics system. **INTERVIEWER:** Alright, perfect thanks. Are there any other modules that the HRIS has?

	PARTICIPANT: The other modules are <mark>Learning and development</mark>, I can't think of anything else oh and <mark>management self-service</mark>.
Q.2.1.2	**INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?** **PARTICIPANT:** Uhm yes definitely, considering that the organisation is the <mark>business module of the organisation is very uhm structured</mark> in that <mark>data and information is always accurate.</mark> So, I guess <mark>PeopleSoft accommodates that need from the business</mark> and therefore I will say that <mark>the HRIS is very effective</mark>.
Q.2.1.3	**INTERVIEWER: Which of the HRIS modules are frequently used by your organisation?** **INTERVIEWER:** Uhm these are the modules we've mentioned previously in question 2.1.1 so that will be Payroll, Time Management, Benefit Administration, Recruitment and Selection, Performance, Employee Self-Service and Analytics. **PARTICIPANT:** The module that we don't use? **INTERVIEWER:** Is frequently being used. **PARTICIPANT:** So definitely <mark>analytics</mark> uhm <mark>the function or module that deals with employee data</mark>, uhm and <mark>the benefit administration as well as payroll, recruitment and employee self-service.</mark> Those are the <mark>modules that are mainly utilised.</mark> <mark>Performance</mark> management only <mark>gets utilised like once or twice a quarter</mark>.
Q.2.1.4	**INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not?** **PARTICIPANT:** I'm <mark>not entirely sure</mark> but <mark>I do think it happens as often as it needs to.</mark> I can say that <mark>in terms of a process and UX design</mark> perspective the system does get <mark>upgraded so that the look and feel is</mark> uhm <mark>modern and sophisticated.</mark>
Q.2.1.5	**INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so?** **PARTICIPANT:** Uhm like I've mentioned before at this point in time I will say medium because <mark>it is currently addressing the different needs that we have within the organisation from a systems point of view</mark> but <mark>as technology improves and we are faced with more complex business issues uhm it will require more updates in terms of robotics, AI etc. If the system cannot keep up with business needs then I think the rating will move from medium to low.</mark>
Q.2.1.6	**INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so?** **PARTICIPANT:** <mark>From a management utilisation perspective of the system I'll say medium</mark>. Holistically as you single them out you'll have management teams that are familiar with the system and those who are not. The team that is familiar will be very satisfied and the team that is unfamiliar and that has not spent enough time on the system has not realised how the system can address their needs. I will most likely rate their satisfaction low.</mark>
Q.2.1.7	**INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?** **PARTICIPANT:** Staff satisfaction – I will rate this <mark>medium</mark> - I say medium because obviously <mark>it allows for them to do basic ESS tasks such as checking payslips, applying for leave etc. The system allows them that visibility and quickly provides the information that they need</mark>. So, I would say medium in their level of usage, so they are satisfied.

RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?	
Q.2.2.1	**INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?** **PARTICIPANT:** Towards the department what? **INTERVIEWER:** The departmental activities. **PARTICIPANT:** Uhm from an HR perspective if you look at it from a departmental yes because obviously during the merger we needed to see like who are the individuals if we are going to need to embark on retrenchments, what data are we going to use etc because that was our mandate from the beginning uhm operational departments I cannot comment - the only thing that I can confirm is that the departmental uhm they achieved a consolidated view can't really say how that correlates to their business objectives.
Q.2.2.2	**INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?** **PARTICIPANT:** High level benefits – the ability to have a consolidated view, having the ability to use information to make decisions more swiftly and most importantly making sure that hosting accurate information of all employees in a secure manner. There is one point of reference and not like going to various systems or consulting different data sets so decision making is obviously more much more swift and making sure the decisions made were based on information or rather accurate data that you had at your disposal. **INTERVIEWER:** Okay, next question.
Q.2.2.3	**INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?** **PARTICIPANT:** So, we have a framework in place, it's not really a framework it's more like an SOP. So, like I've mentioned before we got certain system administrators and if they experience any anomalies, they will know what needs to be done and will inform the business accordingly. On a weekly basis all HR business partners are required to vet their information on the system and identify and rectify their anomalies themselves.
Q.2.2.4	**INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?** **PARTICIPANT:** I am quite satisfied. I think what they can just do maybe is to add more functions in terms of performance management and linking this with analytics. If an API was created between learning and development and performance management so if I identify in the performance review that this person lacks uhm data analysis skills or lets say computer skills. It will eventually direct them to the e-Learning portal that has various courses available and have the individual complete it then and there and if you on the employees profile on PeopleSoft you can see whether the person has completed the recommended courses. I guess something like that could be built but would need to get the buy-in of the process owner which will need to give the green light for configuration.
Q.2.2.5	**INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?** **PARTICIPANT:** I can't really comment but I would say just improving on the basic processes and making sure that it is effective and efficient for the end user and also possibly implementing robotics and artificial intelligence as well. I think just having the system fulfil the business needs as effectively and efficiently as possible also ensures that any future integration is streamlined.

Q.2.2.6	**INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?** **PARTICIPANT:** Better planning and regular training on the utilisation of the system.
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?** **PARTICIPANT:** Adapt processes and systems to fit current and future needs of the organisation and reduce duplication of workflows as well as vendors.
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** **INTERVIEWER:** Like if there is another potential merger what kind of structure or process would you have put in place. **PARTICIPANT:** I think having a structured change management and system integration plan. Making sure there are processes in place and timelines that need to be abided by and not just uhm free styling in terms of making sure people understand the system and utilise the system. So having a change agent that partners with business unit leaders and having everyone exposed to regular training and exposure to the system.

PARTICIPANT 6

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** So yes they do and that's PeopleSoft.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** No, that would only be permanent employees and uh contractors that are directly employed with the company. **INTERVIEWER:** Uhm perfect, and then do you know the different types of access levels? **PARTICIPANT:** No, I don't, I don't. But I do know that uh you get user access -so this is what I know. You get user access and then you get an additional function which is used by IT for the PeopleSoft uhm password resets and then you get the HR function which deals with recruitment, payroll and employee benefits so uhm that is about the different levels that I am aware of. And then also management has a certain level as well. So, your access level will be dependent on your position within the company.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** I'm not sure to be honest with you in terms of, of PeopleSoft, specifically. I'm not sure, I would assume that they're doing training during induction. And then also, I do know, informally, every department, their team leaders or maybe the senior colleagues will show them how the system is used when they become permanent uhm or if they need to do anything. I know that there is communication that goes out on how to do certain things for example, if you have to load your KPI's for performance reviews or if you wanna do your salary checks or your IRP5, they will show like little steps on how to do it. So, I think that is as far as I know in terms of training. **INTERVIEWER:** Okay, so there isn't like when you meet a new starter, someone will actually set up a meeting a take them through the system? **PARTICIPANT:** I don't think so, but there are manuals on how to use the system.
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** I would assume that there is since it is such a sensitive system and environment being used, but I'm not specifically aware of what exactly is put in place, but I do think it is. I know with uhm to access individual accounts that are synced to their (employees) domain accounts, which is what they use to log into the to the profiles, so only the user will know uhm be able to access to that so yeah, as far as I know.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A?** **PARTICIPANT:** So uhm, do I have to answer yes or no? **INTERVIEWER**: Yes

PARTICIPANT: Okay so in leadership, I would say, to be honest I would actually say yes so uhm during the merging process there were a lot of uhm because of the duplication of jobs there was a lot of jobs that were lost and there was a lot of confusion happening and even at the management level they also were at risk in fact management were the first people to be at risk uhm so there was a lot of managers that kind of became aware of their own situation and not providing leadership for their departments and their teams because of their job risks. There were also a lot of managers that lost their jobs, I know at the time the merger was happening, my call centre manager at that time lost her job so uhm there wasn't any effective leadership and uhm even when you had questions leadership also only knew the bare minimum so there was not proper information and communication. It wasn't a consistent information sharing process with proper facts and keeping the employees consistently updated. The business could have implemented a change management process especially, and know that they got such a large company and because it was two massive companies merging into one uhm but I felt that yeah, communication and change management it wasn't very successful and that then impacted the culture because now you taking two different cultures and even until today the and I mean this started what, around 2012 and uhm even until today the cultures are still – and especially, I can bring this in is with this role that I'm doing now having not be based in Cape Town, having gone to Durban, to Centurion, I can see the cultural differences. It is still not aligned, there is still so much - you actually feel like you are stepping into a different company. You can see that the cultures aren't quite the same and then you have the Durban branch, and they have different cultures, they are exposed to a different way of work as well so yes there is still a lot of room for improvement regarding the culture.

INTERVIEWER: Do you think that it will ever be aligned? Or should the cultures just be kept separately?

PARTICIPANT: I would like to see the culture aligned. It would be better because of people like myself that travel, and departments that have to work together and that have to represent as one unit to the client and this should have minimal impact on the user, so if the culture is aligned it's better. So, I would think that it would be much better, when and how long it will take, I don't know, and I don't even know if it will ever happen because of the different locations.

INTERVIEWER: In terms of Job satisfaction?

PARTICIPANT: So, I think in terms of Job satisfaction the merger actually raised a lot of panic because there were lots of people being retrenched. There were complete departments that were being retrenched because of the duplication so like employee benefits for example there was already one in Company A so they, you know people as much as 50 to 60 people lost their jobs at once. That started to create panic and uh so people were looking and starting to apply for jobs like crazy. You seeing the panic happening, you seeing this happening to you colleagues uhm one thing I must add though is with it also came a lot of job openings so a lot of and that is how I was able to go into from the call center to IT it was because of the merger it was through that merger process.
So there were both, it was a catch 22 there were opportunities within the company and there was a loss and you know what I must say and this was very dissatisfying almost every area other than a call center that you moved into, you were at risk because you weren't safe for a certain period until this merge was finalised it took a couple of years uh you were at risk of losing your job. There was no job security during the merger, and then also up until recently like two years ago there were even talks of moving certain departments and to relocate and even that was unsuccessful because the same people that moved locations moved back to their initial location. But look it was a trial and error this wasn't such a big thing uhm I feel like a lot of things was not planned or thought through properly and they just kind of rushed it as well.

INTERVIEWER: So, if there was proper planning do you think it would have had a better impact?
PARTICIPANT: Yes, yes, I think that they were more worried about uhm because when the company merged on the JSE, it put us at a higher level of competing to compete with

	other companies in the financial industry so I think that they were so focused on the market because that was the core thing that kept being pushed in our faces - and okay cool, but how is this affecting your people? Employees? It's like they were so focused on that and the ROI the whole actual merging process wasn't that successful in my opinion and I think it had more of a negative impact than positive. Ya, I think, maybe now, after a few years we can start seeing the opportunity, the exposure and growth. But the way it was done to me, felt too rushed.
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?**

PARTICIPANT: Uhmmm, no I think that it's fine. I haven't had any problems it's just the one thing is uhm at certain times I feel like the system isn't very dependable so it will crash when there is an overload of users on it so maybe get something that's more stable, or that you know - for example, November is when we have Performance Reviews so you know that employees are going to be using the system more often so then it will crash so maybe just putting provisions in place for that and uhm a little more training, there was a lot of things that changed on the system and I think that's also due to the merging and trying to align but there was no training so people got accustomed to a certain look and feel and then they change it and then they don't kind of provide training. They inform but they don't train, so uhm maybe in that angle or other than that I think it was fine, it's not a complicated system to use, especially from a user perspective. I mean even looking at the different access levels, it wasn't that complicated. I just feel like more training should be provided and stability.

INTERVIEWER: Do you think employees with basic user access are aware with all the functionality on the system?

PARTICIPANT: No, I don't think so, I think they just use the basic.

INTERVIEWER: There is so much more though, so many tabs and functions we just avoid because we don't know what it's used for and uhm currently I also feel like our careers web page isn't that user friendly. [Beeping sound] |
| Q.1.1.7 | **INTERVIEWER: Are there effective teamwork and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?**

PARTICIPANT: Not that I'm aware of. We could still do the basics, employees could still access the basics uhm the most part but it's not look the merge is done but there is still constant changes happening with the company finding itself, there's a lot of changes and especially from an IT perspective, branding, rebranding etc. When syncing of the domains to PeopleSoft, there are a lot of issues up until today, this is now going on for a few years now it's quite long where people are not understanding, and the syncing we constantly look at how to train them but I think it was fine.

So data was not changed in the information, there would be the same user names, people with the same name and surnames, incorrect user name because of the same user name being added, the syncing not being done correctly for a user profile and then in terms of integrity and security, there was not a big breach but I can log into my profile and then your information would pop but because it wasn't synced properly or rolled out or integrated properly and that is very dangerous, so we then have to warn people like myself that can access various profiles to say that please do not log into your profile, and it's a fault on IT on PeopleSoft because that was not done properly because I can now access your payslip, I can now do things on your profile and that is very sensitive information so now we have to trust that user and uhm it it, puts that user at risk because it's not that users fault. So, what if that user was not aware of it and they just kind of went to check. |

Q.1.1.8	**INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?**
	PARTICIPANT: Uhmm yes, but I would say medium. Again, coming back to the things that I've mentioned - stability, uhm security around it because there are those faults uhm and then the working of it so it's not, it's simple for the basic things but it's not as informative on how-to and it's not always user friendly. There are also instances where information can pull through incorrectly for example, ID numbers, cellphone uhm it can be incorrect user information it can be uh sometimes the information being loaded on from an HR perspective is incorrect so uhm ya sometimes the information on the system is not always 100% accurate and there is a lot of uhm space for error, it can be human error. So, the system itself that I've seen doesn't have anything to safeguard it from this because its humans working on it and making the changes so human errors occur more often than it should in this kind of application or this kind of system. There should be more processes in place to eliminate human error.
Q.1.1.9	**INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?**
	PARTICIPANT: I think it's a yes and a no to a certain extent especially with the older staff, uhm they were less willing to adapt which is natural - older people are like that uhm and then especially those that stayed within the Company A business area so they would keep their culture and the same with Company B but then between the two mergers there was definitely a new culture that was created, we had new values that were created for us and stuff and there are starting to have some, there are similarities and differences as well. I think teamwork would be a difference, some are more willing than others, some work well together and then others work against each other. Integrity was one of our values were nicely aligned but I think on the most part communication would be more different than similar, and diversity is one that is nicely aligned also and there's some sort of acceptance and integration between the two companies, it's not fully there, there's still room for improvements. But I can see in certain departments a good exchange of information. There are still lots of people holding on to the old culture but I think also with the influx of new people coming into the business with their background and values because a lot of people who are in the company has this horse view - they have to secure their jobs by holding onto information but the new people, they are more open and bring different and fresh ideas and they more willing to share. If I look at my department, my manager and her boss - they come from outside companies and their way of securing their jobs is by letting their employees flourish.
Q.1.1.10	**INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not?**
	PARTICIPANT: I feel like now, there is more room for growth before it was so uhm hierarchical like we used to be a very flat structured and I think to some extent we still are, or we still operate that way even though now we are starting to implement again a hierarchical structure because we now have for example my department we have a team leader, department manager, an onsite manager, a boss and he has got a boss. So, we starting to get that hierarchical thing back again but implementing the culture with that hierarchical system might actually be better. It's not a top-down approach, it's starting to become more of an open conversation, you know? **INTERVIEWER:** Yeah, okay so more open communication? **PARTICIPANT:** Yes
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	**INTERVIEWER: What strategies should be put in place prior to M&A?**

	PARTICIPANT: Uhmmm
	INTERVIEWER: In terms of the IS integration
	PARTICIPANT: Uhm definitely some <mark>more communication in terms of training, of how to use the system, how it will impact the end-user, the employee,</mark> uhm <mark>what changes to be made. Like an induction on the actual system,</mark> I felt like that <mark>would have been more useful especially because one company was not familiar with the system.</mark>
	INTERVIEWER: And in terms of the back-end system?
	RESPONDENT: So that is a bit of a difficult one, uhm so I'm not sure where it goes wrong but <mark>something should have been put in place for data security and then also looking at the people's names and surnames and corresponding that with their domain user names,</mark> when creating their domain user names, they should have checked that there were no duplicates so maybe things like that from my knowledge.
Q.1.2.2	**INTERVIEWER: What strategies should be put in place post-M&A?**
	PARTICIPANT: Uhmmmm
	INTERVIEWER: Any issues that you are currently facing?
	PARTICIPANT: I would still say <mark>have a system stability plan because there are more users being put onto the system.</mark> Uhmm, so definitely that. So, <mark>making sure employee information is correct.</mark>
	INTERVIEWER: So, is the duplication and things still and issue?
	PARTICIPANT: Yes, <mark>duplication of data is currently an issue</mark>, so we were still using our employee numbers so then there was a requirement from the business to sync to eliminate all the different passwords that is currently where that happens.
	INTERVIEWER: So, were they trying to make the log in more secure?
	PARTICIPANT: Yes so, <mark>they were trying to make the login more secure - it's called a single sign on, SSO. So, when you sign onto your domain so you log onto your laptop or your PC and you click on PeopleSoft it will automatically open up. This should have been done at the initial stages of migrating data to the system.</mark>
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?**
	PARTICIPANT: I only know <mark>PeopleSoft</mark>.
Q.1.2.4	**INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?**
	PARTICIPANT: Yes, to all.
	INTERVIEWER: Is there any other strategies?
	PARTICIPANT: So, <mark>there is e-learning</mark>, control to own profiles (user control) basically <mark>ESS</mark>.
Q.1.2.5	**INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?** **PARTICIPANT:** I think it's <mark>good from my experiences</mark>, look it's <mark>not a perfect system and there are still a lot of issues.</mark> The <mark>system has</mark> uhm <mark>a lot of clicking and copying a pasting, too many clicks</mark> so I feel like that part. But <mark>from a user perspective it is very simple</mark>, I think

	from a HR perspective there is a lot of work being put into it, it can be more synchronised and more automated.
Q.1.2.6	INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not? PARTICIPANT: Yes, however there is some room for error. There would be rare cases but this won't happen constantly. I just feel like there shouldn't be anomalies at all because of the sensitivity of the data.
RQ2: How can the HRIS be utilised to achieve organisational success during M&A?	
RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?	
Q.2.1.1	INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics. What other modules does the HRIS have? PARTICIPANT: All of the models are implemented by the HRIS besides time management. The additional modules implemented that I can think of would be e-Learning and Manager Self-Service which allows managers to have immediate access to employee information and initiate employment-related actions. Not sure if there are any additional modules.
Q.2.1.2	INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not? PARTICIPANT: Yes, uhm because it's effective, because of the functionalities that are needed by the business.
Q.2.1.3	INTERVIEWER: Which of the HRIS modules are frequently used by your organisation? PARTICIPANT: From a HR perspective It would be payroll, recruitment, and benefit administration. From an IT perspective it would be the PeopleSoft Password reset functionality and then from a user perspective it would be Career page, ESS and e-Learning, employee benefits.
Q.2.1.4	INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not? PARTICIPANT: Yes, I think that they do, they have to because they need to keep up how they do it, I don't know because we don't get involved in that part because IT does not support PeopleSoft they have got their own support team.
Q.2.1.5	INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so? PARTICIPANT: Medium, but there is still lots of room for improvement. The system does enable the business to keep a proper record of employee information although it does not contribute to any profit for the business.
Q.2.1.6	INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so? PARTICIPANT: Also medium, for the same reasons I've mentioned earlier regarding the stability of it and user friendliness of it.

| Q.2.1.7 | INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?

PARTICIPANT: Same, same as above. Medium. PeopleSoft was chosen as the system that was going to be used after the merger so staff in Company A was not really impacted as we were already familiar with the system and its capabilities. |
|---|---|
| **RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?** | |
| Q.2.2.1 | INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?

PARTICIPANT: Yes, it was effective during the M&A. From an IT perspective our service desk has the functionality to reset passwords so the only thing that I feel - the contractors that are from vendors they don't have the access but they still need to service the users so what they do is they will go to the colleagues that have access which makes it a time consuming process. They can't give them the access, they can't be loaded onto People Soft because they are not on our payroll. |
| Q.2.2.2 | INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?

PARTICIPANT: To be honest with you from my experience both after and before the merger there are no benefits. It's pretty much the same for me, it's just a different look and feel but it's the same because after the merger I pretty much knew how to use the system. Okay maybe the fact that we have more user control now than in the past. |
| Q.2.2.3 | INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?

PARTICIPANT: I would assume so but I'm not sure, it is not publicly documented. |
| Q.2.2.4 | INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?

PARTICIPANT: I would say that I'm satisfied. I don't really have anything else to compare it to, I haven't used another system so I can't compare it. |
| Q.2.2.5 | INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?

PARTICIPANT: To make it more stable, to provide better training on how to use the system and inform different types of functions and access levels that we can – what are those different tabs for, what can we still do uhm yeah and make it more user friendly.

INTERVIEWER: Okay, noted. |
| Q.2.2.6 | INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?

PARTICIPANT: Training – pretty much the same as the above. To also provide better support to users on PeopleSoft. |
| Q.2.2.7 | INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?

PARTICIPANT: Identifying commonalities in data and the approaches to sharing data to reduce errors, standardising data across the business. Understanding the various systems used within the business and how each system integrates with each other. |

Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** **PARTICIPANT:** A thorough change management plan, better communication, transparency, uhm more change management sessions with staff, providing more support for example counselling – there wasn't a lot of that happening. There wasn't any visible support, because the merger started to have impacts on people's lives, their mental health, finances, their job security uhm I also feel like HR was thrown into the business side of the merger to try and get it done as soon as possible instead of providing support for the users/employees. So uhm there was also a break in the relationship up until today with employees and HR as well. So maybe bringing in more organisational psychologists. There is a lack of trust now.

PARTICIPANT 7

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?**
	PARTICIPANT: So yes, and its PeopleSoft uhm as the Human Capital Management System and then yeah so it's being referred to as the ERP which is the Enterprise Resource Planning system so yes.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?**
	PARTICIPANT: Yes, they do so it's Employee Self Service, Manager Self Service and then obviously you've got super user access as well for the different HR practices.
	INTERVIEWER: Does the, is the level of access role dependent as well?
	PARTICIPANT: It is, yes.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?**
	PARTICIPANT: Okay so before the merger and I want to go back into history following the merger we had training manuals for everything. So yes, it's precisely that, it's a manual with a lot of pages and we found that people actually, they never look at it. But if you look at the technology trends nowadays, you actually want your functionality to be intuitive so that the end users do not need to follow and go read a manual to actually do something. So that's the way that we've designed it also at the moment. We don't want people to have a laborious process and a system process that they don't understand and eventually get annoyed with the system and not use it. So, if it's intuitive you actually can use it without having to question something or a manual or someone.
	INTERVIEWER: Okay yes, and what about currently?
	PARTICIPANT: So, we actually spent a tremendous amount of time in the last year, especially on the self-service portion uhm to make it precisely that - reduce the number of clicks so that if you actually do something it's two or three clicks and the transaction is over and done with. The issue with your normal HRIS or your ERP systems is that the way that they designed it doesn't necessarily lens it towards that, most of the time it lens you towards a 10 or 12 step process and in some cases even longer. So, we actually customised to make the user experience to actually make it a digital experience to make the UI and UX components so that the people can say that yes, this is a good experience, I want to make use of this system.
	INTERVIEWER: Okay so in your view, new employees don't need training?
	PARTICIPANT: No
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)**

	PARTICIPANT: Okay so, so there is a couple of things in here uhm firstly we've got a company information security policy so we follow that policy uhm with regard to how we divide our domain access uh our own access is regulated through specific roles within the system so if you are a recruiter you would have recruiter role uhm if you are payroll you would have the payroll role and those roles are then - its controlled by the actual process owners so they would tell us listen we want this group of people to have access to that and this group of people to have access to that uhm so, so the kind of access and what you have access to is one aspect and the other aspect is also who you can see because you can have access to something but you can only see 10 people, the rest is also limited.
	Again, it needs to be signed off by, in HR's case by the executives uhm and then when it comes to the actual process owners by the process owners like uhm a Head of Payroll for payroll uhm Head of Organisational Design for OD - so you have that process guaranteed in terms of signing off uhm I think it's pretty effective although in certain cases it's a little bit reactive which we are looking at, at the moment to make it a little bit more dynamic.
	INTERVIEWER: In terms of software, and computer viruses?
	PARTICIPANT: So we - PeopleSoft has got its own built-in security model but on top of that we've got our own firewall and we actually piggy back on the services provided by I&O (IT), from an IT security perspective. Uhm it always is, I mean there are always threats along the way but the provider of PeopleSoft Oracle actually provides us with patches of upgrades on a continuous basis, security patches, specifically that actually safeguards our environment but it is a continuous effort.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A?**
	PARTICIPANT: So, I marked all of them yes.
	INTERVIEWER: Okay
	PARTICIPANT: There's no question in my mind about it, it obviously depends on what lens you look at it or through what lens you look at it but uhm the merger was massive, it affected everything. However, I do feel that if we had more of an effective change management plan or strategy in place, the company would have been able to focus on top priorities, engage and empower employees, and reduce disturbances in the workplace.
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?**
	PARTICIPANT: I would say that it does uhm but it all depends on how mature your processes are. So, for HRIS if you want to like PeopleSoft for example, if you want to use the full functionality that is provided you need to have maturity across all your different HR practices in order to sweat the asset uhm obviously the more mature the HR community and HR processes is the more you can use the HRIS. uhm if it's a small company you can probably get away with not having an HRIS but for a company like ours you actually need to have one.
	INTERVIEWER: And is it effective for your business?
	PARTICIPANT: Uhm it is effective for the business most definitely but there are lots of things that we can still unlock uhm in the system that again talks to the maturity of your HR environment.
	INTERVIEWER: So, it's business dependent?
	PARTICIPANT: Yes

Q.1.1.7	INTERVIEWER: Are there effective teamwork and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?
	PARTICIPANT: Yes, we've got a dev ops environment that is completely agile and our way of work is also completely agile and then in that process we also get the respective process owners, the HR process owners to take part in the process so in other words - you get all of them together in one meeting and we actually together determine what is the priorities we're going to have for our next sprint and then your sprint of the development is going to be done. So together as one cohort, we decide what are the priorities and what we are going to focus on.
Q.1.1.8	INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?
	PARTICIPANT: I said that the trust is probably round about medium. Uhm so, so, we need to remember that we develop based on what the process owner wants and so for example, in a performance management or performance excellence case they would say I want you to design x y and z and this is the way I want you to deliver it. I think that the component that we are missing is that we are not looking from the outside in so we are not saying to your average Joe listen how do you want this to work?
	INTERVIEWER: Hmm
	PARTICIPANT: It's not always practical but I think there is an aspect to that, if we do that then you would probably have a high trust in the HRIS as opposed to a medium trust in the HRIS. The other thing is also for certain functionalities, like for example, performance excellence, people actually need to understand the practice before they can use the functionality the way it's been designed and uhm you sometimes get to a stage where you realise but listen this person doesn't know anything about what we trying to achieve for performance excellence yet wants a user functionality. So, we changed a little bit of a step in there to say, specifically for super users like recruiters and so forth we say you need to go through the training first before we actually going to allow you to use the functionality. It's not always possible but I mean that's what we try to do.
	INTERVIEWER: [Laughing] Yeah, yeah, but that makes sense.
Q.1.1.9	INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?
	PARTICIPANT: Alright, so this is a big one. So, the aspirations were there to have one culture for the group but I think they – it was completely underrated of how different the cultures in the different businesses are. If you look at Company B I think there was a very strong specific culture and in the Company A world it was – I don't want to say a free for all kind of culture but it was, it was a lit bit all over. Uhm, the aspiration to have one culture in my mind never really got off the ground - yes we have one set of values, one set of perspectives but how it was executed in the business although I think the aspiration was to say we will created one culture, it never did and I think even at this point in time we still don't have one culture uhm and maybe it's not possible but from a values perspective at least everybody is prescribing towards the same values so uhm one culture in my view is really really difficult to get, you have two big diverse companies like Company A and Company B merging.
There was a lot of progress, lots. I mean we've had the occupational health benchmark factor done, they're going to do it again now so overall I think all the businesses are concentrating quite high on making sure that yes we growing in the same direction, we want to address the problems we're seeing from a culture perspective but but a lot of times culture is a perception- and it's difficult to change a perception of somebody that's been here for donkey years.

Q.1.1.10	**INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not?**
	PARTICIPANT: I think it's fair, I think it's the right thing for this business. Uhmm I think what makes it difficult from a HR perspective is that we've had 6 different operating modules for HR since the merger so regardless of how HR tries to drive a specific process, every time you've got a new operating module, you change gear, you actually go back. You have to start the process and the journey again so personally I think the executive of this business does not realise what role HR really needs to play in this business as a strategic department, we are not there yet we're getting there. But again at the same time it's not something that happens overnight in any case. It's something that takes a long time, so it's a slow journey.

RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?

Q.1.2.1	**INTERVIEWER: What strategies should be put in place prior to M&A?**
	PARTICIPANT: Okay so this is, this is uhm - I've got my own idea about this. I don't believe that it is really possible for a business of this size to have had a strategy for HR specifically prior to the M&A. The first thing that we realised when we actually started the discussions after the merger was approved was that we have vastly different HR practice labels and to get those two together from a strategic perspective is also a challenge. Again, it was a matter if you had a couple of drivers and executives - they all had their own opinions uhm from a HR perspective and in a fair amount of cases it wasn't even an HR perspective it was sometimes an executive from the outside shooting in to say this is what I want to do from a strategic perspective but the intention was always good. I think it's a matter of we saw that we needed to have one HR strategy to for the business uh but it was really difficult if you sitting with a situation we had where uh on our side we had job grades and on their side they didn't have any job grades then you had uh accountability levels that were different so you had alignment that needed to take place there and although there was agreement when it comes to the execution that is the difficult part where start saying no I don't want that and then it starts changing your strategy back again. So, I don't know if I answered you, it's a difficult thing to have for a business of this nature an upfront and agreed upon strategy.

Q.1.2.2	**INTERVIEWER: What strategies should be put in place post-M&A?**
	PARTICIPANT: It is crucial for HR to have a strategy that is being executed properly. Your strategy should talk about every aspect of HR. Uhm so for any and every practice within HR uhm I'm referring to recruitment, your talent management, you uh succession planning...all of those things. There needs to be a strategy. I'm not talking about a 50 page document but I think there should be at least guidance from a strategic perspective identifying what it is that the business wants to achieve because that again forces what you want to achieve from an operating perspective. And….it can be an aspiration that you work towards but at least there is a matter where you start a journey and you eventually get to where you want to be from a merging perspective.
	INTERVIEWER: And in terms of the HRIS – is there any specific plans that should be in place?
	PARTICIPANT: So, so it ties back to what I said much earlier is that your HRIS eventually uhm is only uhm, assisting in driving what you want to achieve from a HR perspective.
	INTERVIEWER: Hmm okay
	PARTICIPANT: So, we cannot implement the bells and whistles of the HRIS if your maturity of your HR is not close to that. So, it is a matter of saying, okay you need to continuously check in with your practice weaver into your operations and how the system can support that at the end of the day.

	Once you've got a strategy and you say listen, this is what we want to achieve and obviously it flows back to how you want to design and configure your HRIS but your HRIS - it is critical that it supports what the business wants to achieve because if there is a gap in there then nobody will use the system. In our case I think there are lots of examples where that actually is happening.
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?** **PARTICIPANT:** On the Company A side it was PeopleSoft and Company A it was Oracle E-business Suite. **INTERVIEWER:** Do you know why businesses decided to opt for PeopleSoft and not E-business Suite? **PARTICIPANT:** Yeah so, it was - there's actually lots of reasons but the predominant reason was that PeopleSoft was embedded into the organisation from an HR perspective in Company A. In Company B they used E-business Suite as it was rolled out for the First Rand Group uhm in other words FNB and Company B, Westbank and all those businesses and they were on E-business Suite I think for about 12 months at the time that we merged so look there was…this was a big thing and there was proposals on both sides, the pros and the cons and eventually it comes down to uhm the usability, the impact on the business if you should change either way, the actual cost thereof, uhm PeopleSoft was much cheaper than E-business Suite would have cost us and the time for implementation. **INTERVIEWER:** Oh okay. **PARTICIPANT:** We were forced to implement within the shortest possible time frame and if we had to do E-business Suite uhm we didn't have the skill that could do that from a technical perspective so it would have taken us probably about 1 and a half or 2 times longer than what it did take.
Q.1.2.4	**INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?** **PARTICIPANT:** So, from purely from a technical perspective yes it does uhm and then if I want to add there. I mean talent management is actually a...you looking at organisational effectiveness and organisational design it can be included in there from a strategic perspective uhm your benefits obviously as well then our digital strategy for HR as well because we've got a very specific digital strategy where we say we want to digitise all our processes uhm and get rid of paper all over. Uhm and that is a fairly big strategy but again we cannot technically drive that strategy in the absence of the practices being part of that. So its automation, its process enablement uhm process simplification uhm all of that so so…effectively you want to remove any barriers that exists with paperwork in between, you want to make sure that the process is so streamline that any tom dick and harry can make use of the system without having a comprehensive background on what it is that we want to achieve.
Q.1.2.5	**INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?** **PARTICIPANT:** Okay so, we keep on saying that the problem is between the chair and the actual keyboard uhm so it's easy from a technical perspective it really is. I think the way that we're requiring capturing to be done and the recording and retrieval thereof is, is uh…it's not necessarily as simple as we would want it to be. We are moving towards that objective. Uhm, but it's not a complicated process most definitely not. The way that we are also starting to do our retrieval of data and the actual reporting of that is we are also making it much user friendly for the end user and we are starting to make use of Qlikview which gives you an enormous ability to make the data look good.

INTERVIEWER: Is Qlikview a plug in to PeopleSoft?

PARTICIPANT: No, it's not, it's a completely different system. We take the data from PeopleSoft and then there is a transfer process. We call it an ETL, you actually pick up your data from PS, you transform it and then load it to a separate database from where we are reporting. That then forms the basis on how you are actually doing your reporting from a Qlikview perspective. So, Qlikview is just an application or tool that allows you to do reporting in a user friendly way but I mean to make it look good.

INTERVIEWER: What do you think is the biggest challenge for the capturing, retrieval and recording of data?

PARTICIPANT: No, I think there's two problems from my perspective - the one is that if the functionality is properly used otherwise if you put the emphasis back on the person that wants to join your organisation or the employee being responsible for their own data then your data accuracy will be much higher. Uhm so, and I think there are a lot of businesses that actually miss that portion completely if you use the actual recruitment model properly then eventually the data that you load as an applicant to the business is the data that is recorded on the system eventually for you as an employee so the more inaccurate the data is that you record the more the inaccurate our reporting will be as well.
So, there's a lack of using the functionality properly, the second thing is that there is a big lack of getting all the required information at the appropriate time. Uhm which means that you will forever and a day actually have an inconsistency in your data because when is business going to go back and correct the data so what we doing is that we actually starting to make the mandatory fields much more which means that you cannot get past a specific screen if you don't capture x, y and z uhm... and in that way you're enforcing the fact that you need that data, but you can still capture garbage. I don't think the process is really tedious uhm but it can be more simplified and it can be made more seamless.

INTERVIEWER: I see – are there any like monthly data clean ups?

PARTICIPANT: Forever and a day.

INTERVIEWER: So, who's accountable?

PARTICIPANT: The business units are accountable, because we're back to a decentralised model the business units are responsible for making sure that their data is correct on the system. Uhm we obviously help with making sure that the mandatory fields and everything is captured and then we do validation on certain fields where we can. In other words, for an ID number for example, we can do what is called a modelist 13 calculation and you can say but listen this ID number is not correct, sorry we are not accepting it. Uhm then for addresses we're actually using the full SARS format in terms of how addresses are captured and that's sometimes complicated because from a regulatory perspective there's specific things that we need and whether you think it's appropriate or not we actually need to report on certain things. And then I think from an end-user perspective sometimes complicates it.

Q.1.2.6	**INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?** **PARTICIPANT:** So yes, and I think it links back to the question I answered about the security previously. Uhm...within PS there are two levels of security. The one is what you can see and the other is who you can see, so the group of people that you can see. Even prior to the merger that is something that we're really really strict about so if you're working in a business like Company A for example the HR executive needs to sign off that you can only see that data. Uhm, the added benefit that you have is that it is stored in a SQL database and that actually means that it's difficult to get to the data uhm because it actually sits behind the application. If you have direct database access obviously your data is compromised but

	that we manage even more stricter. There are very few people that have got database access, so I think it's done pretty effectively uhm...yeah.
RQ2: How can the HRIS be utilised to achieve organisational success during M&A?	
RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?	
Q.2.1.1	**INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics.** **What other modules does the HRIS have?** **PARTICIPANT:** So, we've got payroll, we don't have time management, benefit administration yes, recruitment and selection yes, performance yes, employee self-service yes, manager self-service you can add there and obviously the analytics and self-service reports that you have. Under benefit administration you can add leave, uhm...there is a whole heap of other things that we've also added uh to our I want to say the front end, your loading or your landing page in terms of functionality but you can't really call it a model I mean in Company A for example we've got a fias model that we've built specifically just for them uhm and then we've got a pay for performance system that we also built for Company A and Company B for example. So, there are a lot of additional stuff that we've built and customised but that speaks to a specific business need within the business. You can also add to this list, learning and development. That is not on PeopleSoft, it is not on the HRIS, that is actually a completely different ERP. You wouldn't know it from an end user perspective, but it is two completely different systems. **INTERVIEWER:** Is it a plug in to PeopleSoft? **PARTICIPANT:** No, the integration is done through PS technology and the actual - it actually integrates it automatically but its seen as the same system for the end user so if you click on a button in or on the landing page on PeopleSoft and say I want to look at my learning reports or whatever you actually going into another environment which is the learning management system of PeopleSoft again uhm so its two completely different ERP's that we're linking seamlessly so the end user doesn't know any knowledge of two different systems being used. In your traditional world, HRIS only provides for the recording of learning – so if you look at how we need to report on training uhm the traditional learning and development and training recording systems does not actually cater for that. The other thing is also and it is a big thing is that you want to drive learning content to your people so that's where and the actual learning management system is helping but it's not state of the art uhm but the LMS is there so that you actually deliver the content also to the end user so the end user can do the training online once completed it actually records it on the database automatically and it is on record and it also adds automatically to the reporting requirements of the business. The demand for more learning uhm or how you deliver the learning content is very high so I think what the PeopleSoft LMS provides from a functional perspective is not necessarily the level of where you want to deliver content to but always there's a costing aspect to say but can the business afford another set of technologies and we are looking at that at the moment.
Q.2.1.2	**INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?** **PARTICIPANT:** Yes, uhm….I don't believe that you're going to get an HRIS that talks 100% ever to what an organisation wants to be delivered through an HRIS so you're always going to have a different set of business rules that is not catered for the system and what we do in that regard is actually just customise the system. We build on top of – it needs a specific strategy that we have, we are aware that if we need to go buy different systems it's going to cost us much more than what we are paying at the moment so you need to on the one side sweat your asset which I think we are doing 100% correctly, the stuff that we customise is more specific to our business but not

	necessarily specific to a practice. Uhm from a practical perspective I think the HRIS delivers the functional requirements that are there.
Q.2.1.3	INTERVIEWER: Which of the HRIS modules are frequently used by your organisation? PARTICIPANT: All of them. All of those that I've mentioned are frequently used by the business. Some parts of the business make use of certain functionality a little bit more, but the functionality itself is built and configured on whether the organisation needs not necessarily what the specific business within the organisation needs are.
Q.2.1.4	INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not? PARTICIPANT: Yes, we do, way too little. INTERVIEWER: [Laughing] PARTICIPANT: It is way too big of an exercise. It's a massive exercise so..the reason why it's actually complex in our case is when we have to upgrade is because of all the customisations. So technically speaking, you are going to have to go rebuild everything that you've customised on the application on the newer version as well. To give you an example, the previous upgrade we've done in 2016 it took us...10 months to do it. INTERVIEWER: To do one upgrade? PARTICIPANT: Yes, and then at that point in time you actually holt the entire business because you need to make sure that your version that you have uhm as your base in terms of your upgrade stays the same and doesn't change uhm because if that changes you actually move your target continuously in terms of what you need to deliver.
Q.2.1.5	INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so? PARTICIPANT: Okay so, I'm gonna go with low and the reason why I'm saying that is it also ties back to certain things that I've mentioned in the beginning is that if you look at the levels of...maturity within the HRIS you start with your normal transactional stuff, then you go into the higher level where you actually start to get value out of your data and then you go into higher levels where you start to do predictive analytics and all of those kind of things. So, we are not 100% at the predictive analytics stage but that's where you would want to be, you always want to be in a position where you start making use of your system for succession planning, pipeline and all of those kinds of functionalities that sit in the system automatically. Uhm...and we are not there yet so that's why I would say low and the aspiration is definitely to get to high uhm but again it's a journey and from a HR practice perspective it's going to take some time to actually get there.
Q.2.1.6	INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so? PARTICIPANT: I would again say medium. Uhm and for the same reasons that I said earlier in the sense that you never going to get to a perfect world in terms of your satisfaction for this kind of business and the size of the business because every division within this business needs are different. Again, the functional requirements that we provide is based on what the specific process or practice owner wants us to deliver on and not again what management necessarily wants out of the system. INTERVIEWER: Do you think that management should be involved?

	PARTICIPANT: Honest answer from my side is I think <mark>if you do involve them there's not sufficient support for a specific HR practice in this business in terms of standardisation uhm...too often you find that if a specific executive member says listen I want this to happen. It's going to happen regardless of what the practice is,</mark> so that in itself makes it really really difficult to involve business because management - if management uhm goes according to which foot they get out of the bed with in the morning, then your HRIS will never be able to answer that, never.
Q.2.1.7	**INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?** **PARTICIPANT:** So, it increased overtime. Uhm.. so I would say m<mark>edium because we're making the functionality much more intuitive, we're making the design much more uhm from a UI and UX perspective better and then we're decreasing the number of clicks</mark> considerably. So, <mark>from an employee self-service and a manager self-service we're really trying to say let's make the experience a good one so that you want to come back to the functionality.</mark>

RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?

Q.2.2.1	**INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?** **PARTICIPANT:** So I would say, and I don't know if in-between is an answer but <mark>the HRIS when we merged it was a like for like installation so what Company B had on the system we actually had to implement exactly like that or better on the HRIS so it was like for like</mark> meaning that <mark>the business continued exactly on the same lines then thereafter it was a benefit alignment process</mark> where we said okay well now <mark>we've got two different worlds that we're implementing on the HRIS let's start to look at getting those two together and the only way that you could achieve that is to say we need to have benefit alignment.</mark> So that the benefit structures of the different businesses actually talk to the same thing. Uhm and <mark>then only can you start looking at where you can start standardising your processes so we continued with the efficiency and effectiveness that Company B had on the previous system, and it took a while before we could actually make it a better experience.</mark>
Q.2.2.2	**INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?** **PARTICIPANT:** So, <mark>it's a one-stop solution for all staff,</mark> the <mark>costing definitely came down</mark> considerably, it was <mark>much more expensive with the other system that Company B used,</mark> uhm and your <mark>support staff was much less, or the support staff that you required technically was much less.</mark> Uhm, and...yeah I guess that was about it, I mean at the end it was a matter of <mark>the nature of the functionality that Company B used on the E-business Suite was really limited compared to how much functionality we can roll out on the Company A side so, it took us a while to get the total group to agree on one process that you deliver from a PeopleSoft perspective</mark> where it was sort of a practice in let's say the old Company A but <mark>Company B still had to get used to the practice.</mark> Uhm...if that answers your question, I mean it was, again it's a journey it's not something that happens overnight.
Q.2.2.3	**INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?** **PARTICIPANT:** Okay <mark>so we certainly don't have a policy to talk about the integration for each of the integrations and the acquisitions that we've done and the mergers that we've done</mark> you actually go and say and <mark>determine what is your project plan and what is your approach because it greatly depends on how mature the services are that they using on the other HRIS</mark> uhm <mark>what process do they have that is implemented over there, how much data it is that you</mark> need to convert uhm and then <mark>the complexity of the data and whether we can actually make provision for the data on our side.</mark> <mark>From an integration perspective</mark> uhm most definitely, it is a situation of uhm you need to <mark>compare</mark> the two apples with one another, and then you going <mark>to identify how you're</mark>

	going to get the one onto the other and yeah it depends on the size and how big the effort is going to be for the integration to be done. From a maintenance perspective, yes - we've got clear maintenance. Uhm server maintenance is done on a monthly basis and database management is done on a weekly basis [inaudible] we've also got an automation process running so yes, we have.
Q.2.2.4	**INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?** **PARTICIPANT:** Most definitely, I think what we're paying for our HRIS compared to what you would be paying to get another system is chalk and cheese. I mean it's probably about 10 times more than what we are paying at the moment if you want to go for a different solution and we've gone through those exercises to actually do that so we really sweating the asset uhm of cause you will always have HRISs that is better than the one you have but there is a price linked to it. Uhm...and then it also again, comes back to the maturity of your organisation and the strategy that we have is more to look at maybe in the future if we can afford it to look at niche kind of applications to say okay for Performance Excellence there is this brilliant product that we can us from the market, lets see how we can integrate it into your HRIS. From a transactional perspective, but yet it delivers on what the requirements are for performance excellence the same would count for recruitment and talent management and all the other things. Over time you're going to get there to say that you probably have PeopleSoft as a transactional system and you've got all the different applications that you use and integrate with that, that actually talks to the requirements of a specific HR practice. **INTERVIEWER:** And that's in the future? **PARTICIPANT:** We are actually starting with that exercise.
Q.2.2.5	**INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?** **PARTICIPANT:** Okay so the maintenance will continue the way it is at the moment and actual integration into line of business systems is just going to increase so we are certainly going to increase our uhm authoritative source that we have from an employee data perspective throughout the business and manage it from a – I want to say from a PeopleSoft perspective but more from a data perspective. In other words, what I mean is that if someone is terminated on PeopleSoft then it automatically runs through all the line of business systems so that your access is terminated and we don't create security risk and breaches with the employee still having access to a specific line of business or system after they have left. So, those are the kind of integrations that we're looking at, at the moment. And in fact, there are a lot of them already. **INTERVIEWER:** Oh really? What was implemented? Do you mind mentioning? **PARTICIPANT:** Yeah yeah. So active directory – we've implemented that already, uhm..then we actually have integrations with the security system and to lots to the line of business systems, the integration already exists as well so uhm…where access is controlled by AD - your active directory, it's easy but if you look at certain Company A and Company B [inaudible] systems where it's not linked to your AD account so in most of those systems – yeah this is confidential but I mean the system actually don't know what your employee number is because that is not a field that needs to be captured on that system for you to have access. So we also busy with a project it's a group project where we saying okay we need to standardise that because there is a big risk in that, you have access to a system after you've left but you actually terminated from the group at the end of the day so there's lots of line of business systems where we are still busy with that but then there's are underlying processes that needs to be managed first uhm but the most obvious ones that is linked to AD it actually is a pretty simple and easy exercise.

Q.2.2.6	**INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?** **PARTICIPANT:** This is a purely technical response I'm going to give you, we sitting in a position where we can integrate in a world class uhm format and uhm design to any system and service across the business but there's lots of outdated technology and systems which doesn't always allow you integrate in that specific way so that's a challenge in itself because you've got legacy systems but there's way and means around it. So, I mean wherever there is a challenge we actually choose to say how do we overcome this and how can we actually the business case as opposed to say that you know from an integration system perspective it can't be linked to that. We try to overcome it with getting uhm...a workable solution - eventually you might get to a proper way of integrating but as soon as you have a workable solution in place then at least you can go one notch higher with your functional integrations. Its old systems where your integration abilities are not that easy. I mean with integrations, we're choosing web servers to integrate with other systems uhm and if the other line of business systems cannot manage and work with web servers then we going to an older style of integration what we want to achieve from an integration perspective is to actually switch on a process and you forget about it so you don't have to worry about it - its automated it runs, it doesn't have to have high maintenance.
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?** **PARTICIPANT:** We have a post project review – so you actually go through the review to see what worked and what didn't and what we would do differently. So, every time that you go into a new exercise, you actually have to go through the learnings of the past and what you know you can achieve better. We actually took that into consideration with how we are going to tackle the project again - a new project but it's a difficult process. I mean every specific one has different nuances of what needs to be achieved. Every M&A is different but it does help. I mean we're sitting in a situation now where we actually changing our payroll engine and uhm this morning we had a committee meeting where We were asked why we are so confident and how many times has this team done it. So, I said well it's the same team that's actually been doing it for the last 10 years and that gives a lot of assurance in a sense to its people that understand the environment.
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** **PARTICIPANT:** So, the one thing if I could change is we actually should have done benefit alignment upfront - medical aid and pension fund etc. If you had done that upfront it would have made the whole exercise easier for your integration because the way that we've done the merger in terms of the like for principal was to say we've got different business processes that we had to support for different business it has an effect on your support, maintenance and the actual functionality that can be unlocked, the standard functionality if there is different processes that you need to support. So, overall, you wouldn't want that exercise to be easier. We've tried to get certain acquisitions and forced them through the benefit alignment exercise prior to doing the integration then your project is longer, although from an integration and systems perspective it's easier. Uhm, I think the other thing is also, for this specific first merger - you had people on different planets that did not want to meet in the middle, there was lots of resistance and even though from a strategic perspective we agreed on a lot of occasions that this was the way we were going to do things going forward, you have people walking out of the room and still doing their own thing and not worrying about the practice and strategy was. So, if one could say, this is our strategy, this is how we are going to implement it, let's look at how we're going to measure this - to see if the business is actually going according to that strategy and that's difficult. In HR it's never done but you'll measure the success of a strategy depends on how well you can measure it afterwards. So, lots of things we could have done differently but benefit alignment most definitely. I think maybe, and this is a sensitive one - is being truthful about what the merger actually was whether it was a merger or whether it was an acquisition. In the Company A world it felt like...it was a

situation of us feeling like you know what, we're being taken over and in the Company B world they certainly thought that, that was what was happening so uhm then it's difficult to believe that it's actually a merger because a merger is bringing two entities together and then integrating those two entities into one new entity. ==Understanding what is the best of both worlds and you put that on the table as a strategy and that will result in immediate buy in which helps with transition. With two forced entities being forced into one - you are always going to have issues.==

We had an external contractor that provided for the data that we had to migrate to our side, we had group risk involved, assurance the entire way. ==In the whole process group risk was involved. It took us 9 to 10 months to actually do the migration of data and it was a tedious process because getting risk involved in the process always makes it longer but at least it gives you the assurance== so in the end we were comfortable that there were no data leaks, that the data was converted properly, in fact the other the day someone asked me about the history of an employee and I could go back to 1982 and this is what happened and then he said wow he didn't know that we done the exercise that well. In hindsight we transferred the correct data, appropriately, so that we as a business could from a legal perspective actually answer queries and stuff that we had to.

PARTICIPANT 8

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** Yes, <mark>Oracle PeopleSoft</mark> as our central HRIS system.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** <mark>No not all employees have access to PeopleSoft. The various access levels are Employee Self Service, Manager Self Service, super user access for HR</mark>. The access also varies in terms of your role within the business.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** Yes, <mark>we do have training in place for the system</mark>. We have o<mark>n the job training</mark> which is usually <mark>conducted by the line manager or HR</mark>. The <mark>PeopleSoft team has improved and designed the system so that little to no training is needed</mark>.
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** <mark>PeopleSoft has its own security model</mark> and I'm sure there are <mark>also various firewalls in place as well</mark>.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A?** **PARTICIPANT:** So yes, to all. **INTERVIEWER:** Okay, why do you say so? **PARTICIPANT:** The merger definitely impacted all those areas.
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?** **PARTICIPANT:** Uhm...yes – <mark>organisations should constantly measure and examine the cost and benefits and how the system of choice</mark> will <mark>provide positive returns because the business will always be growing and will need to keep up with the latest tech trends</mark>. In my opinion, <mark>I feel that a good information system is a relevant component of the current business environment</mark>. Also, <mark>PeopleSoft reduces geographical gaps within the business</mark>. **INTERVIEWER:** Would you say the current system is effective for your business? **PARTICIPANT:** Uhm <mark>it is effective for the business but there are lots of things we can still improve</mark>.
Q.1.1.7	**INTERVIEWER: Are there effective teamwork and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?**

	PARTICIPANT: No, I don't think there was effective teamwork and participation. After the merger we did not receive proper training on how to use the system. We were just expected to read a manual without any assistance or guidance.
Q.1.1.8	**INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?** **PARTICIPANT:** I would say it's Low. I don't think Managers receive sufficient training around new processes on the system or understand the various functionalities that are available as a manager.
Q.1.1.9	**INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?** **PARTICIPANT:** I don't think a new culture presented itself immediately but over the past few years a new culture has emerged.
Q.1.1.10	**INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not?** **PARTICIPANT:** Uhm...I think that the new culture created more synergies and encouraged teamwork across the group. I think all employees are making an effort to adapt to the new culture which is a high-performance driven culture that is data driven and solutions focused.
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	**INTERVIEWER: What strategies should be put in place prior to M&A?** **PARTICIPANT:** Okay, so in my opinion I would say that a successful integration is accomplished through different strategies. So, I think that you need to consider which system is optimal, communication is vital, uhm planning because this should be done before any integration of any kind takes place. I also feel that there should be an effective change management plan in place, creating awareness and educating users on the new system, also creating e-learning or training manuals for the new system and I think uhm, having a solid integration plan that that that, includes all parties involved and IT to make sure it goes smoothly. **INTERVIEWER:** Okay, interesting. **PARTICIPANT:** You also have to determine which system you are going to keep, what data is important and how much integration is needed in terms of data etc. It is also crucial to understand the differences between the companies' IT maturity levels.
Q.1.2.2	**INTERVIEWER: What strategies should be put in place post-M&A?** **PARTICIPANT:** Post-acquisition integration is a complex and time-consuming process with numerous factors to consider - In my view I would first look at how mature the HR processes are and whether there is an effective HR strategy in place and then using the system to generate satisfaction among the business and also to create a shared vision among the employees. Uhm, what is also important is to have support services available and to have a platform that encourages feedback for improvement on various processes on the system.
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?** **PARTICIPANT:** Company A used PeopleSoft and Company B used Oracle E-business Suite.
Q.1.2.4	**INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection,**

	training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish? **PARTICIPANT:** Yes, <mark>it does implement all the strategies listed</mark>. You can <mark>add talent management</mark>, <mark>off-boarding and onboarding new employees, employee benefits.</mark>
Q.1.2.5	**INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?** **PARTICIPANT:** This <mark>depends on how the data was stored on the previous HRIS system</mark> uhm <mark>if it was captured incorrectly the transference of this data would be incorrect</mark> however, <mark>overall the capturing is effective</mark>. There are <mark>checks in place to ensure data is captured correctly.</mark> **INTERVIEWER:** Checks as in data audits? And who is responsible for this? **PARTICIPANT:** Yes – <mark>the business unit or HR would be responsible to ensure the data is accurate.</mark>
Q.1.2.6	**INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?** **PARTICIPANT:** Yes, <mark>all information was easily accessible during the merger</mark>. All <mark>information was treated with confidentiality and privacy.</mark> Only <mark>specific individuals were authorised to view personal information.</mark>
**RQ2: How can the HRIS be utilised to achieve organisational success during M&A?**
**RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?**
Q.2.1.1	**INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics.** **What other modules does the HRIS have?** **PARTICIPANT:** <mark>All modules except time management.</mark> **INTERVIEWER:** Okay, are there any other modules being implemented? **PARTICIPANT:** Uhm...yes so, we do also have E<mark>-learning, Manager and Employee Self-service</mark> uhm you can also add <mark>workforce planning</mark> and yeah – I think that is about it.
Q.2.1.2	**INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?** **PARTICIPANT:** Yes, definitely. <mark>The system is not very rigid</mark> – we usually <mark>build our own personalised processes into the system</mark> uhm Performance Excellence for an example. We <mark>created an entire process where employees could request feedback from various individuals within the business, submit goals and scorecards etc.</mark> **INTERVIEWER:** Nice **PARTICIPANT:** [Coughing] Excuse me – uhm, yes <mark>but I do think that there will probably always be better systems which will come at a price</mark> so I think we are <mark>getting value for our money.</mark>
Q.2.1.3	**INTERVIEWER: Which of the HRIS modules are frequently used by your organisation?**

	PARTICIPANT: <mark>All of the modules are frequently used by the business</mark> although <mark>some modules are used more frequently in certain areas of the business.</mark>
Q.2.1.4	**INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not?** **PARTICIPANT:** <mark>Yes as far as I am aware</mark>, although I know that <mark>it is a strenuous process so it does not happen often.</mark>
Q.2.1.5	**INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so?** **PARTICIPANT:** <mark>High</mark> because <mark>PeopleSoft contributes to crucial functions of the business.</mark>
Q.2.1.6	**INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so?** **PARTICIPANT:** I would say <mark>Medium</mark> – when <mark>new processes are introduced to the business, I think managers should at least be trained.</mark>
Q.2.1.7	**INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?** **PARTICIPANT:** <mark>Medium</mark>, there is <mark>always room for improvement</mark> but I think <mark>over the years employees are realising the value of the system.</mark>
RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?	
Q.2.2.1	**INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?** **PARTICIPANT:** Yes, as a HR personal it <mark>helps me perform most of my day-to-day duties</mark>, this <mark>frees up a lot of the time spent on admin</mark> and <mark>creates time for one to focus on strategy and implementation of new ideas.</mark>
Q.2.2.2	**INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?** **PARTICIPANT:** Hmm benefits, okay I would say the <mark>mobile self-service option has created a high employment engagement and sense of empowerment.</mark> Employees no longer need to depend on HR to retrieve payslips etc. which also <mark>frees up lots of time for HR</mark>, uhm I think that <mark>collaboration between different business units has improved.</mark> Yeah, and with PeopleSoft we only <mark>have one true source of data to help with analytics and reporting</mark> so that the organisation can <mark>make informed data-driven decisions.</mark> Lastly, another benefit would be <mark>easy access to information, speed of data retrieval and the automation of recurring tasks.</mark> **INTERVIEWER:** Yeah, so basically allowing the business to focus on strategic initiatives. **PARTICIPANT:** [Laughing] Yes, correct.
Q.2.2.3	**INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?** **PARTICIPANT:** I <mark>don't think that there is an official policy or guideline</mark> in place but <mark>there was probably a framework or SOP developed at the project planning stage.</mark>
Q.2.2.4	**INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?**

	PARTICIPANT: I think there are better and more advanced systems than PeopleSoft. However, PeopleSoft can take care of all HR processes and unify employee data in a single system. Over the years we've made it more user friendly for employees to update and access personal information. We've plugged in analytics programs such as Qlikview for our reporting and we continue to update the system as per business needs. **INTERVIEWER:** Nice, next question.
Q.2.2.5	**INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?** **PARTICIPANT:** I think that the maintenance plans will probably remain in place but with regards to the integration - I want to say that we would like to link the system to various other systems and have one true system with all the other great functionalities.
Q.2.2.6	**INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?** **PARTICIPANT:** Understanding the other business systems used in the business and how we can integrate these systems. PeopleSoft has an API limitation, so it does not integrate to all new applications easily.
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?** **PARTICIPANT:** Understanding how different systems within the organisation are able to communicate with each other. To successfully integrate a system there needs to be constant communication and standardise data between businesses i.e. employee codes, positions **INTERVIEWER:** Alright, next question.
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** **PARTICIPANT:** We should have done benefit alignment upfront – medical aid and pension fund so that all employees were on the same page, business decisions must be made on an understanding of a unified set of data that is accessible across the organisation. I think also just being transparent and communicating to all employees appropriately.

PARTICIPANT 9

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** Yes, Oracle PeopleSoft.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** Yes, all employees, except for independent contractors.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** There is no training specific to the system that is provided at a group level. However, each department is responsible to have this training form part of their onboarding and induction process.
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** Yes, once an employee is onboarded and hired on our payroll system, only then will they have access to this HRIS.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A? So the factors are leadership, software and development, communication, change management, culture, employee turnover, performance appraisals and job satisfaction. Mention other factors that your organisation went through in HRIS implementation?** **PARTICIPANT:** Yes to all.
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?** **PARTICIPANT:** Yes, the size of the operation definitely plays a role. Understanding impact, adoption and change management is key in implementing an HRIS. Having key stakeholders onboard and having them aware of such implementation is extremely important.
Q.1.1.7	**INTERVIEWER: Are there effective teamwork and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?** **PARTICIPANT:** This varies from Business Unit to Business Unit. I will however say that our organisation is driven by several values, one being teamwork. For our organisation, collaboration is extremely important across teams and allows for flexibility of working on various systems and projects across business. There are the minority few who have the preference of working independently, this does and should not however have any impact on the implementation of an independently driven HRIS system.

Q.1.1.8	INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so? PARTICIPANT: Medium. There are quite a few anomalies and additional system upgrades that are slowly taking place to better support and digitise various applications, making it easier and more efficient to have technology at the tip of your fingers.
Q.1.1.9	INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not? PARTICIPANT: Being in HR, I have been on the receiving end of a lot of emotions that were still quite high, even four years down the line. Several staff currently feel that it was not a merger, but rather a "takeover". They feel that a lot of HRIS and benefits adopted by one company have dominated in choice and preference based on the implementation and adoption across the business.
Q.1.1.10	INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not? PARTICIPANT: I would say that when our organisation merged, the difficulty has been and still is integrating the culture of two very different organisations into one. Many would agree that although a new culture has been instilled, it is one that is very different to what they were used to.
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	INTERVIEWER: What strategies should be put in place prior to M&A? PARTICIPANT: Firstly, doing a dipstick to understand what employees would prefer before forcing a decision onto them. This approach will ensure that staff feel that they are being acknowledged, that their opinion matters, that they are informed and consulted.
Q.1.2.2	INTERVIEWER: What strategies should be put in place post-M&A? PARTICIPANT: Effective change management and constant communication. Take staff on this journey with you. Do not keep them hanging, guessing and creating perceptions that are not there.
Q.1.2.3	INTERVIEWER: What HRIS system was used prior to the M&A? PARTICIPANT: We used Oracle EBS prior to the merger.
Q.1.2.4	INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish? PARTICIPANT: Yes, as well as benefit administration, position management, SLA tracking, reporting/analytics and the retrieval of any employee data.
Q.1.2.5	INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so? PARTICIPANT: It has been quite effective and houses a lot of information. It is easy to use and quite simple.
Q.1.2.6	INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not? PARTICIPANT: Yes, specific levels of access are driven by the users' extent to which their role requires them to have access to confidential and private information. Logging

	onto the <mark>system requires a username and password and linked to my employee number allows the system to confirm the level of my access on the backend.</mark>

<table>
<tr><td colspan="2">RQ2: How can the HRIS be utilised to achieve organisational success during M&A?</td></tr>
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<tr><td>Q.2.1.1</td><td>INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics.
What other modules does the HRIS have?

PARTICIPANT: <mark>So yes to all besides time management.</mark> The <mark>other modules include PeopleTrax which is a case management system, uhm position management and PeopleConnect which is a layout of all hierarchical structures and an employee directory as well as an e-Learning module.</mark></td></tr>
<tr><td>Q.2.1.2</td><td>INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?

PARTICIPANT: Most <mark>definitely.</mark> The <mark>system houses quite a number of modules.</mark> I do think that <mark>there is room for some system enhancements or improvements that can allow for much better flow and consistency.</mark></td></tr>
<tr><td>Q.2.1.3</td><td>INTERVIEWER: Which of the HRIS modules are frequently used by your organisation?

PARTICIPANT: In my opinion I would say it would be <mark>Payroll, Recruitment and Selection as well as benefits and various administrative tasks.</mark> Modules such as <mark>Performance reviews are only really used about twice a year.</mark></td></tr>
<tr><td>Q.2.1.4</td><td>INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not?

PARTICIPANT: I'm not sure.</td></tr>
<tr><td>Q.2.1.5</td><td>INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so?

PARTICIPANT: <mark>Medium.</mark> As stated previously, <mark>there is room for improvement. Sometimes the system kicks out errors, especially when there are too many users online at the same time. Also, the system requires a bit of more consistency.</mark></td></tr>
<tr><td>Q.2.1.6</td><td>INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so?

PARTICIPANT: <mark>Medium. Specifically with Performance Excellence, there are several complaints – not user friendly.</mark></td></tr>
<tr><td>Q.2.1.7</td><td>INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?

PARTICIPANT: <mark>Medium. Certain modules like e-recruit can be a bit burdensome – time consuming and complicated.</mark></td></tr>
<tr><td colspan="2">RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?</td></tr>
<tr><td>Q.2.2.1</td><td>INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?</td></tr>
</table>

	PARTICIPANT: Post the merger, I can say that ==the system has allowed for efficiency and effectiveness, but again, there is room for improvements and enhancements.==
Q.2.2.2	**INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?** **PARTICIPANT:** ==One platform, one reporting tool and one integrated system whereby all information is housed and can be accessed== (based on access rights).
Q.2.2.3	**INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?** **PARTICIPANT:** Not too sure about this.
Q.2.2.4	**INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?** **PARTICIPANT:** ==I do not think an alternate system is required around performance.== I do think that they ==simply need to uncomplicate a simple system so that it is more user-friendly and not complex and burdensome to use.==
Q.2.2.5	**INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?** **PARTICIPANT:** ==Continuous digitisation and simplification.== Having the ==system available via your mobile phone and accessible at the click of a button.==
Q.2.2.6	**INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?** **PARTICIPANT:** ==Measuring what employees find complicated and identifying what small implementations can solve for a more successful HRIS.==
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?** **PARTICIPANT:** ==Keep staff at the forefront of everything you do and implement.== They are ultimately responsible for ensuring they keep the ship moving. So, ==help staff to help themselves easily access information and navigate a system to better carry out their jobs. Communicate the change more and get input from the start.==
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** **PARTICIPANT:** ==Outsource a company to assist in measuring employee opinions and views. Get buy in and budget to properly deliver on a quality service. Ensure proper due diligence is followed to determine any updates, data that are needed for a smooth transition.==

PARTICIPANT 10

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** PARTICIPANT: Yes, Oracle PeopleSoft.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** PARTICIPANT: Yes, but not all employees have the same access levels. It differs in terms of your role in the company – what you are allowed to view or do on the system and also in terms of your level within the business.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** PARTICIPANT: Yes, during induction there is training on how to use PeopleSoft. **INTERVIEWER:** Does training happen throughout the business? PARTICIPANT: Yes, HR usually conducts the training within their business units. There is e-learning and manuals.
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** PARTICIPANT: Yes, I think that we have a fairly good IT team that oversees the security of the system. There was one instance where we had a virus and one system crashed so we were offline for about three days but since then it has been fixed and there have been good implementations in terms of security.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A? So the factors are leadership, software and development, communication, change management, culture, employee turnover, performance appraisals and job satisfaction. Mention other factors that your organisation went through in HRIS implementation?** PARTICIPANT: Over the years there has been a lot of emphasis on culture and communication. There has been a lot of drive on getting a unanimous Company A and Company B culture – creating a common culture.
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?** PARTICIPANT: No, I don't think the size of the business determines the effectiveness of a system - streamlining processes and having accurate data readily available is what makes a system effective.
Q.1.1.7	**INTERVIEWER: Is there effective team work and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?**

	PARTICIPANT: <mark>Yes, there has always been sufficient support and we have a help desk that assists with any queries.</mark>
Q.1.1.8	**INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?** **PARTICIPANT**<mark>:</mark> <mark>I would say yes</mark> but I don't think high, I'm going to say <mark>Medium because you are always going to get push back.</mark> For example, during performance appraisals, it was not really user friendly.
Q.1.1.9	**INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?** **PARTICIPANT:** I do think so – <mark>all employees are living the new combined culture however; the older employees still have their own baggage and silos.</mark>
Q.1.1.10	**INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not?** **PARTICIPANT:** I think <mark>the culture is better and very inclusive</mark>. I like the fact that <mark>a lot of the values we have, speak to my values. The older employees do seem reluctant to the new culture. Employees with longer tenure and who were present before the merger experiences the comfort of existing routines.</mark>
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	**INTERVIEWER: What strategies should be put in place prior to M&A?** **PARTICIPANT:** I think <mark>there should have been more engagement with the employees.</mark>
Q.1.2.2	**INTERVIEWER: What strategies should be put in place post-M&A?** **PARTICIPANT:** There <mark>are lots of new things that are being implemented.</mark> The fact that there is a <mark>single sign on, mobile access</mark>. I think <mark>there should be continuous communication with the business.</mark>
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?** **PARTICIPANT:** The <mark>system that was used was Oracle EBS prior to the merger but</mark> Company A utilised PeopleSoft prior to the merger.
Q.1.2.4	**INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?** **PARTICIPANT:** <mark>Yes, to all as well as Performance Management.</mark>
Q.1.2.5	**INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?** **PARTICIPANT**<mark>:</mark> <mark>I don't think it is as effective as it should be</mark> uhm, because remember years ago we still have employees working before computers [laughing] so their <mark>information is not necessarily correct so many years ago the company use to write up contracts so if you're looking for that employees contract you might not find it.</mark> So yeah, <mark>some of the things fell through the cracks. So right now, I think it's effective because of PeopleTrax, our case management system.</mark>
Q.1.2.6	**INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?**

	PARTICIPANT: Yes, definitely. I don't know of any instances where there was a confidentiality breach.

<table>
<tr><td colspan="2">RQ2: How can the HRIS be utilised to achieve organisational success during M&A?</td></tr>
<tr><td colspan="2">RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?</td></tr>
<tr><td>Q.2.1.1</td><td>INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics.
What other modules does the HRIS have?

PARTICIPANT: All of the modules besides time management.</td></tr>
<tr><td>Q.2.1.2</td><td>INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?

PARTICIPANT: Yes, all the modules are effective and the business upgrades processes where needed.</td></tr>
<tr><td>Q.2.1.3</td><td>INTERVIEWER: Which of the HRIS modules are frequently used by your organisation?

PARTICIPANT: I would say payroll is being used frequently, recruitment is used often, performance management is used every quarter only and self-service.</td></tr>
<tr><td>Q.2.1.4</td><td>INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not?

PARTICIPANT: Yes they do but I have no idea how often it is being updated. I know there is a period during the year where there is a freeze – this is when IT uploads the increases and those things.</td></tr>
<tr><td>Q.2.1.5</td><td>INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so?

PARTICIPANT: I think it's High because it is an important tool, you know all your employee information is hosted on the system, the system is used to pay employees, it used for people to apply for jobs, to track performance so it's very effective in terms of the employee life-cycle.</td></tr>
<tr><td>Q.2.1.6</td><td>INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so?

PARTICIPANT: I would say Medium - management is sometimes reluctant to the changes being implemented on the system. I think it's a mindset story, they need to embrace the change.</td></tr>
<tr><td>Q.2.1.7</td><td>INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?

PARTICIPANT: I think staff in general are happy, so I'd say High - the system is being used often and the mobile app is very useful.</td></tr>
<tr><td colspan="2">RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?</td></tr>
<tr><td>Q.2.2.1</td><td>INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?</td></tr>
</table>

	PARTICIPANT: I think the <mark>system was fairly effective and efficient during the M&A.</mark>
Q.2.2.2	**INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?** **PARTICIPANT:** <mark>Knowledge transfer, streamlining and automating processes, adapting more agile operations and capabilities.</mark>
Q.2.2.3	**INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?** **PARTICIPANT:** Yes, the <mark>Company does have a framework for integration and maintenance. I don't know what it's called.</mark>
Q.2.2.4	**INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?** **PARTICIPANT:** Yes, I am quite <mark>happy with the system</mark>.
Q.2.2.5	**INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?** **PARTICIPANT:** I guess <mark>implementing more processes around AI</mark>. <mark>Enhancing the employee experience on the system, reducing the number of clicks.</mark>
Q.2.2.6	**INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?** **PARTICIPANT:** Probably <mark>data integrity, I think the individuals who are capturing should put checks and things in place.</mark>
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?** **PARTICIPANT:** I think <mark>proper change management, communicating with the business and keeping employees informed, always being transparent.</mark>
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** **PARTICIPANT:** <mark>Identify integration and automation processes early on. Ensure that all systems and operations are fully integrated and functional in a timely manner.</mark>

PARTICIPANT 11

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** Okay so yes we do, and the HRIS is called Oracle PeopleSoft.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** Uhm so from my knowledge, all employees have access. So as employees, they would have self-service and then management has a different level as well as HR. So, I would say it depends on your role within the organisation.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** Yes they do, our HR does the training especially when there are new enhancements that are implemented on the system, it's more on the job training, there are presentations in terms of guidance as well.
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** I think there is, I know that we get informed quite regularly in terms of system upgrades that take place especially with cyber admin so I do have an awareness that the system is constantly updated in terms of security and make employees aware in terms of what it is that is being done.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A? So the factors are leadership, software and development, communication, change management, culture, employee turnover, performance appraisals and job satisfaction. Mention other factors that your organisation went through in HRIS implementation?** **PARTICIPANT:** Uhm, I would say obviously change management yes, uhm, leadership as well, software and development to a certain extent because there were changes on the system that took place there uhm, communication in my mind there is always room for improvement so I wouldn't say that it was the best but it wasn't like poorest either so it is in between. Culture as well, I'm not sure that employee turnover was impacted, uhm performance appraisals not immediately no – obviously we changed uhm the process. The job satisfaction is very difficult to comment on, there was some decrease in job satisfaction because of all the change that was happening.
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?** **PARTICIPANT:** I think it's working, I don't think it's working successfully uhm again I'm always of the view that we could do certain things differently uhm and enhance. I know that the business is constantly working on improving uhm in terms of implementation obviously certain things take longer than others but yeah it is always a work in progress. It does however work with the size of the business; on the other hand I think what we are

	using now seems to be working and I haven't used another system so I don't have anything to compare it to.
Q.1.1.7	INTERVIEWER: Is there effective team work and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not? PARTICIPANT: Because I know that the business adopted Company A's system, I don't know what system Company B used. So there was effective team work and staff participation when we implemented the system across the business.
Q.1.1.8	INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so? PARTICIPANT: I would probably go with High, because to management it seems to be working and providing the tools that they need obviously again there are more enhancements that could be made to make the system better but I also think that is the reason why we are still using the system.
Q.1.1.9	INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not? PARTICIPANT: I do think it did uhm you know it came out in different ways obviously and again I believe it is based on which business were you situated and how does it present itself so for example, if you sat in a pure Company A business and a lot of for example Company A business moved into Company B business then you adopted that culture and if you sat in a Company B business where there was no Company A culture coming into the business then you kept your culture. I do believe that it was dependent on which business you were situated in and what came together and merged. In my view, there was not a common merged culture it was more the one culture would be absorbed into the more predominant culture. If I have to define the culture, there are certain ways each business would have done certain things in the Company A space for example Company B comes in and now we're blending or merging together. I think Company Bs culture was so dominant that we adopted it to do things the way Company B was doing things, changing management etc was also a factor. It was a difficult thing to accept but you know it's business as usual - you have to swim or sink.
Q.1.1.10	INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not? PARTICIPANT: I think the culture is still very different if you had to look at the companies in isolation. I mean we split the companies in terms of branding etc. because each company has its own target client base. I feel like in terms of values you would adopt the culture and values depending on which business unit you are based in. I don't think that there has been a common culture, if you do however change businesses you have to adapt to whatever culture is in that business.
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	INTERVIEWER: What strategies should be put in place prior to M&A? PARTICIPANT: If the right people were included upfront, it would have made a difference but I don't think enough or the relevant individuals were included in the merger related discussions.
Q.1.2.2	INTERVIEWER: What strategies should be put in place post-M&A? PARTICIPANT: I think back then it was a lot about not effectively communicating to employees. I felt that everyone should be informed with anything regarding the merger, not only the people that were directly impacted by the merger. We tried to create one

	unified brand but it did not work, after a few years the brand split into Company A and Company B and the businesses are operating as separate entities.
Q.1.2.3	INTERVIEWER: What HRIS system was used prior to the M&A? PARTICIPANT: I used PeopleSoft in Company A, I'm not sure which system was used in Company B.
Q.1.2.4	INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish? PARTICIPANT: In my view, recruitment, and selection yes, payroll yes, uhm training and development yes but not everything is on there mostly used for awareness, recognition, and rewards - to a certain extent yes because that's where we do nominations for performance takes place right uhm it's not fully functional on PeopleSoft. INTERVIEWER: Are there any other strategies? PARTICIPANT: No, that's basically it. I suppose if one goes and researches other things Oracle PeopleSoft can do, there would be more things. The business is probably not utilising the full system.
Q.1.2.5	INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so? PARTICIPANT: I think that it's pretty accurate. I haven't really experienced any issues. A system is as good as the people capturing or using it so for example if there would have been any enhancements that weren't testing properly, you're obviously going to get issues but if things were tested and approved then things would go well. So again, it's just as good as the people that needed to do what they were supposed to do.
Q.1.2.6	INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not? PARTICIPANT: I can't say that there have been any issues. If there would have been I don't think that the rest of the business would have been informed but I doubt it. I mean again, the system was able to provide confidentiality, privacy and security during the merger.
RQ2: How can the HRIS be utilised to achieve organisational success during M&A?	
RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?	
Q.2.1.1	INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics. What other modules does the HRIS have? PARTICIPANT: Yes to payroll, no to time management, benefit administration - look I don't know like I don't know about the benefit component because I think a lot of things has changed so I can't comment on that, recruitment and selection yes, performance that is also a yes, employee self-service yes and then analytics I do think so again my knowledge of the analytics part was in my previous role and I haven't it used it since then.
Q.2.1.2	INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not?

	PARTICIPANT: It is effective for now. I know that there are other huge businesses out there that are also using Oracle PeopleSoft. So, I think a lot of companies will make use of it, again - it is to which extent are you going to use the system. Although if I think about technological capabilities, I don't think the system will be able to keep abreast with all the changes in comparison with other more advanced HRISs.
Q.2.1.3	**INTERVIEWER: Which of the HRIS modules are frequently used by your organisation?** **PARTICIPANT:** All of the modules.
Q.2.1.4	**INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not?** **PARTICIPANT:** Look I think they do but I can't comment on how often the upgrades are done. I think it's important for the system to be upgraded why - because that's how you ensure the business stays up to date.
Q.2.1.5	**INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so?** **PARTICIPANT:** I would rate it high. In my opinion, if we are not going to use this system, how are we going to pay staff, know how many employees are employed at the business at a specific time and maintain accurate employee data. We have to use the system and we have to make sure the system is effective in order to automate and enhance certain components on the system. Again, I think there are lots of things that the business can improve on the system such as certain functionalities but these things take time. We can definitely do some enhancements on recruitment and selection.
Q.2.1.6	**INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so?** **PARTICIPANT:** I wouldn't go with high – I think for certain levels of management it works well for others they still believe in manual process but you know what – the more we push back that will force them to embrace the change because you know at some point your leadership has to take accountability for doing what they need to do whether it's approving leave on the system, or locating something on the system. I would say medium because there is a lot of push back from certain areas. The push back should come from the business to enforce using the system and reducing all manual processes.
Q.2.1.7	**INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?** **PARTICIPANT:** Uhm, I don't think that the staff is familiar with anything else. This is the employee's that has been with the company prior to the merger. I would say it is what we use, and everyone makes it work whether they like it or not. I would say high, the system is easy to navigate.
RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?	
Q.2.2.1	**INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?** **PARTICIPANT:** Yes, I was using the system from an employee perspective during the merger, it was effective - it was business as usual. However, I don't think the system was for Company B as Company B was adopting Company As systems so I would say Company B staff would have been impacted because they would be adopting a new system and would have to get familiar with the system and try to make it work for them.

Q.2.2.2	**INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?** **PARTICIPANT:** The benefit in my view, is that there is one central system. If you look at the payroll department - this department was centralised because you can't have two separate systems for payroll; it was never going to work
Q.2.2.3	**INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?** **PARTICIPANT:** I think there would be, I don't think its public knowledge, if it is, it would probably be in the IT space.
Q.2.2.4	**INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?** **PARTICIPANT:** Again, I think in my view Oracle PeopleSoft is not a bad system. I think a little bit of enhancements on certain processes and ensuring we are using the system to its full capacity.
Q.2.2.5	**INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?** **PARTICIPANT:** Always ensuring the system is aligned to business requirements. I think we can also utilise more modules which are not being used on the system and eliminate all manual processes, everything should be standardised and automated across the business.
Q.2.2.6	**INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?** **PARTICIPANT:** I doubt there are any challenges at the moment that I can mention.
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?** **PARTICIPANT:** Ensuring that there is transparency and effective communication in place. There is so much value in keeping employees informed, they know what to expect, you know what to do and how to adjust etc.
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** **PARTICIPANT:** Communication, change management, transparency.

PARTICIPANT 12

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** Uhm yes it would be Oracle PeopleSoft.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** I'm not sure but I think everyone has access depending on how you use the system.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** Not that I am aware of – new employees don't really get any training maybe if you need to use advanced features maybe that's when employees will receive training. **INTERVIEWER:** Okay so there is no formal training in place? **PARTICIPANT:** Not that I am aware of.
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** Uhm there is anti-virus for every device that we use as long as it is linked to the company's domain.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A? So the factors are leadership, software and development, communication, change management, culture, employee turnover, performance appraisals and job satisfaction. Mention other factors that your organisation went through in HRIS implementation?** **PARTICIPANT:** Yes, different levels within the organisation would have had different experience when it comes to these factors so uhm leadership was important in the change management aspect, I think they did the best they could given the tools and the time that they had but then part of me thinks that it could have been done much better. It felt like they were learning as they were going, it's like they didn't know what would happen if the two companies would merge. They were just taking things out of their hat and were not prepared and with regards to software and development - different businesses had different accesses to PeopleSoft and used the system differently. When the merger happened, the role changed and we were supposed to know how PeopleSoft works and how to recruit people on the system. My opinion is that during the merger they could have come up with better software and development. Communication was horrible, leadership has a challenge when it comes to communication - they sort of keep the information and then they share the information when they feel it is the right time but at the same time it is important to be transparent from the beginning so that it makes the whole process easier and people know what is coming and are better prepared for it. Change management wasn't great either, I mean if you mess up on communication then change management will definitely be impacted. You need to communicate to employees about the change and how it could possibly affect them and the time aspects as well you can't tell employees tomorrow that they can't have a job.

	Culture – there was a culture shock like we might have been merged into one company but we did things differently so Company A was more family orientated and when we merged we sort of felt like we were the step children. I guess we got used to it. Employee turnover was high because of the uncertainty. I mean given the communication when they came and said we have to cut people by half and obviously you wouldn't know if you're affected or not. People started looking for new jobs. Performance appraisals became more complicated and less fruitful - because of the merger the job satisfaction was impacted so people were exhausted and unmotivated. When it came to salary increases it wasn't about how Company A was performing it was the entire business so as much as we said Company A outperformed if the other business did not it would have impacted the performance appraisals as well.
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?** **PARTICIPANT:** Uhm I think it would – so if the business is bigger, you need to find effective ways on how you manage information, how you recruit, how to retain employees. So, you would need a system that will be very efficient and convenient.
Q.1.1.7	**INTERVIEWER: Are there effective teamwork and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And if no, why not?** **PARTICIPANT:** I am of the opinion that employees do not want to use the system because they feel that it is outdated. So, I don't think there was teamwork and staff participation in place because this would be where the executives and managers would come together and think about a better system and make the whole process better. It was more of a this is what I tell you and this is what you will do type of situation.
Q.1.1.8	**INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?** **PARTICIPANT:** It depends on the department. The majority of managers don't really use the full functionality of the HRIS system and there are problems as well like managers cannot bulk approve leave, they have to do it manually. So, they don't have confidence in the system. I will rate it Low.
Q.1.1.9	**INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?** **PARTICIPANT:** I would think there was an ideal culture that the business wanted - it was a whole culture of family and doing things together. This ideal culture was what management and executives dreamt of and they did present it to the rest of the business. But adopting that culture was a little bit challenging because it's easier to say that we are one family and let's do this together rather than actually implementing or influencing this culture. There was more informing the business of this new culture rather than living the culture and values.
Q.1.1.10	**INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not?** **PARTICIPANT:** Look it's still a long way to go uhm because if you look at it I am in learning and development in Company A and I don't even know who is in Company B learning and development so ideally if this new culture was a culture that was being embraced then me as an L&D person, I should be able to know who is L&D in Company B - like becoming like one family so it's not there and there is a long way to go. It's not like a long term thing or having smaller goals to implement the new culture so that they can get to the point for one culture or identifying any issues. I don't know if we'll ever have that culture, but I hope that we do.

RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	**INTERVIEWER: What strategies should be put in place prior to M&A?** **PARTICIPANT:** Mergers are complicated so I guess planning would be one of the strategies and transparency/communication as well because I believe that if you are working with a lot of people, for people to gain trust you need to be transparent and show that you have their best interest at heart. You need to show the business that you are also vulnerable and be honest instead of pretending that everything is okay because that expires at the end of the day. In turn employees will not be happy. So, I think planning, transparency, honesty, and research actually. Research is very important about how previously companies dealt with mergers and acquisition, identifying possible impacts etc.
Q.1.2.2	**INTERVIEWER: What strategies should be put in place post-M&A?** **PARTICIPANT:** Change management, change is constant and if we're looking at systems - they are upgraded constantly. In this world digitalisation is a big thing. If you look at HR, HR in 2014 is completely different to HR today. Post-merger – training is very important so that employees are equipped with the knowledge to use systems and things and still transparency you know is very important. Keeping employees interested in work and understanding what actually motivates employees is also important and in that same way you are able to retain employees and reduce employee turnover and sort of like you gain the trust of the employees. I think if you work towards rebuilding the trust with the employees, keeping that transparency and integrity employees will tend to trust you.
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?** **PARTICIPANT:** PeopleSoft was used by Company A, Company B used Oracle EBS.
Q.1.2.4	**INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?** **PARTICIPANT:** Yes to all. Maybe you can add BI as well for the data management.
Q.1.2.5	**INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?** **PARTICIPANT:** I think it's not that effective because not everyone is doing it. If everyone is using it then it's easier and effective. If some people uhm are not using the system as intended then it's not effective. For example, when you capture you need to capture everything on the document and then if only two people capture that information then it won't be effective because the data that you retrieve from the system is not accurate. I think it's not user friendly to be honest. There are a lot of things, there are naming convention issues, you have to save it in multiple places, there is no convenient place to dump it. I don't think it's effective at all because not everyone is doing what they are supposed to do. I wouldn't really go to PeopleSoft to check how many people got married this year for example because as much as people would change their marital status not everyone uploads the necessary documentation. Payroll does not upload it because they say they don't have time so that means that my data is flawed.
Q.1.2.6	**INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?** **PARTICIPANT:** The thing with the system or any other system is dependent on an individual to physically scan in a document and take it and shred it. I think that the confidentiality and privacy is already compromised so now I really can't say that there was confidentiality provided by PeopleSoft; it was more of confidentiality of the people

	who were working on the system during the merger and not everyone has the same access on PeopleSoft - you wouldn't be able to see who was retrenched and who wasn't if it wasn't part of your role.

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?	
RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?	
Q.2.1.1	INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics. What other modules does the HRIS have? PARTICIPANT: Payroll yes, time management, no, benefits and administration, yes, recruitment is a yes, performance is a yes, employee self-service yes as well as analytics. I'm not aware of any other modules.
Q.2.1.2	INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not? PARTICIPANT: No not for the learning and development department. I mean learning and development requires much more up to date systems you know. So, I don't think the HRIS suits the business.
Q.2.1.3	INTERVIEWER: Which of the HRIS modules are frequently used by your organisation? PARTICIPANT: I think they use all of them. The modules are required to be used for the business to run.
Q.2.1.4	INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not? PARTICIPANT: I think they do, so I guess when PeopleSoft releases upgrades we also upgrade.
Q.2.1.5	INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so? PARTICIPANT: Medium with all the modules that we mentioned from payroll to analytics - there is always a problem on a monthly basis if we had a better system then I think we would be running smoothly. PeopleSoft creates more problems for payroll than actually resolving issues, at the end of the day payroll is exhausted and they end up not liking the system and for Team Leaders it becomes a second job. So, systems are supposed to make your life easier but it makes it more hectic. It adds additional work, so I believe that you can't really give credit to PeopleSoft for the continuity and success to the organisation. The data that PeopleSoft presents is so inaccurate - how are you going to continue and be successful.
Q.2.1.6	INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so? PARTICIPANT: Low, because it's never simple. Payroll would say today is the cut off for approving the overtime and then it cuts off a day before tomorrow or the day before the actual date that is communicated and like I said that then creates a problem for payroll because once you have communicated information they would then have to go back and reopen the system if things are not being picked up by the system and then people don't get paid at the end of the day so there is a ripple effect. So that is one example, so if that happens - employees and managers are not happy.

Q.2.1.7	INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so? PARTICIPANT: Low, employees don't like PeopleSoft. I have never heard anyone saying I love PeopleSoft. [Laughing]
RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?	
Q.2.2.1	INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not? PARTICIPANT: No, we hardly used PeopleSoft.
Q.2.2.2	INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A? PARTICIPANT: I guess recruitment and selection wasn't done the same way prior to the merger. It was more manual.
Q.2.2.3	INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not? PARTICIPANT: They could, I wouldn't know because maintenance is not part of my department. I have never seen it, because all policies/manuals are available on the intranet.
Q.2.2.4	INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why? PARTICIPANT: I think the business needs to move with the times and maybe understand their business needs you know. I love PeopleSoft when I'm using it for University because it's user friendly, it's nice to work with, I know where to get my results and I never have any issues with it. I have used PeopleSoft before at university but then when I moved here I was like – PeopleSoft is not this complicated. I think maybe they need to find a system that actually works well for this specific business to manage the number of employees. I would recommend the business uses a different system.
Q.2.2.5	INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS? PARTICIPANT: The people that manage the business are very scared of change.
Q.2.2.6	INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing? PARTICIPANT: I think it's dependent on the executives, they need to see it from our perspective and try to walk in our shoes so that they can implement a better system or make it better. I'm afraid that it is dependent on management. I wish we had a better learning management system – where employees can go on the system and apply for a bursary and then have a requisition generated from that information – that is not there so it's all manual at this point – the only way that we could get that is for management to do something about it. PeopleSoft is very tedious, we need a system that is less tedious, too many clicks.
Q.2.2.7	INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future? PARTICIPANT: I don't think the issues that employees or the business are experiencing now is related to the merger. I think it's related to the choice of the system.

Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?**
	PARTICIPANT: I think <mark>training if employees were trained before the merger. They were supposed to be trained in anticipation for the merger so if you're going to introduce recruitment and selection to these people who haven't used it, train employees on the system and process.</mark>

PARTICIPANT 13

Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** Yes, our organisation makes use of an HR system uhm the name of the system is Oracle PeopleSoft.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** Okay so all employees that are currently on our payroll system do have access to PeopleSoft. Uhm their level of access depends on their roles and their profiles. So, if you are an employee, you'll have self-service access, if you are a manager, you will have your self-service and manager access, then you will have your specialist roles which will be like your uhm if you are a recruiter, you will have recruiter access with the other different accesses. If you are a learning management system administrator you will have that particular access. So, with each practice you will have a specific role, even payroll will have their own specific access.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** Okay, yeah that is a very broad question in a sense that from an employee perspective there used to be training however, uhm recently the Human Capital Assistants will have an induction where they will actually train new employees that's being on boarded into the company and just give them a basic understanding on how PeopleSoft works for logging leave etc. For the specialist field there is uhm online training, like e-learning which will be like your recruiter will do online elements and the administrator will also do and most times they will actually – because PeopleSoft, the LMS in particular is very rocket science [Laughing] so uhm, a lot of them will require training whether it's like a classroom intervention or a VC so that they can understand the process. There is no formal training and I think that in most cases but because an employee – I wouldn't say limited but the functionality depending on what they want to do. So, in most cases employees will only use the PeopleSoft for applying for leave, or updating their information on the system uhm etc. etc. and their access is quite limited uhm on the system for that matter. There will be people that will go on the system and there will be people that don't so I think maybe from a user experience it's not important to them as long as they can apply for their leave etc. There is other functionality that we are busy incorporating but it depends on what the business wants and then what business wants. We obviously do an analysis, we see what we can incorporate on the system.
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** I know that currently we have uhm McAfee. What they are basically doing is penetration testing so just to see if a hacker should hack into our servers are they able to penetrate the PeopleSoft system for that matter. So, there are things in place but that is more from an IT perspective, so IT will be more in control because obviously they will need to access the servers in order for them to access the HR system.

Q.1.1.5	INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A? So the factors are leadership, software and development, communication, change management, culture, employee turnover, performance appraisals and job satisfaction. Mention other factors that your organisation went through in HRIS implementation?
	PARTICIPANT: Yes, I definitely think that all. Culture had to change, our employee turnover as well went from a large amount of people to a smaller amount as mergers tend to result in job losses for employees in redundant areas in the combined company and this impacted job satisfaction because of the lack of security. Uhm, I think, in that case I would say yes to all.
Q.1.1.6	INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?
	PARTICIPANT: I definitely think so because obviously as business expands it requires a lot more data or information from the HRIS and with that comes more development, there comes more uhm requirements from a HR system because uhm yeah as the company grows, it grows with data management and all of those things and the only time how the company can acquire that data management depends on whether the HR system is up and ready to provide for the output to the data management system. For example, when the organisation introduced the Learning Management system in 2014. So, there was a lot of data that needed to be inputted into the system so what you put in is what you get out, you know?
	INTERVIEW: Yes
	PARTICIPANT: So, the business realised that there will be a request for a data warehouse and that is where we had to look at what is relevant especially for SETA report so what do SETA reporting need from the HR system to provide to the BI warehouse so that they can take that information and supply to the SETA because previously the business used an Excel spreadsheet. SETA came back and said listen, you are going to need a system that can house all of this information.
Q.1.1.7	INTERVIEWER: Are there effective teamwork and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?
	PARTICIPANT: Okay so because PeopleSoft was being used before the merger, the employees knew what PeopleSoft was about. However, I can from personal experience that there was effective teamwork and staff participation because if you don't then the system won't be effective. We looked at the benefits and drawbacks of the system etc.
Q.1.1.8	INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?
	PARTICIPANT: I would think that initially, maybe after the merger there was a bit of uhm distrust especially considering the data integrity and since then we when we became aware of it, and we put a lot of security measures in place in order to secure the system. For example, even with the BI team, there was a lot of data integrity and now that we released the POPI Act and cyber security and all of that stuff, so the employees are now aware of it. However, initially after the merger, when people request reports they would give all the information and then the data management team stepped in and said guys we are not supposed to supply this type of information, on this level to any employee so that is when security measures were put in place, and we started asking questions around, who are you, what do you do, and why do you need this information. This was probably on a much lower scale before the merger. There wasn't much awareness but once we implemented the POPPIA that is when employees were aware that they can't do this or can't do that, you know that type of thing. So, there is now more of a procedure and process involved in providing important information.

	I would say that there is a high confidence now.
Q.1.1.9	**INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?** **PARTICIPANT:** A new culture has definitely emerged after the merger. It is definitely a more performance-driven culture that we have now. We had more of a family-orientated previously. So now it's more business focused, constant change in terms of technology even from a PeopleSoft perspective, we designed the Mobi app so that employees can have access to apply for leave, payslips on the go.
Q.1.1.10	**INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not?** **PARTICIPANT:** In certain aspects it still feels like Company A and Company B are separate entities. So, if you ask any person who do you work for? They will either say Company A or Company B, you know that kind of thing. **INTERVIEW:** [Laughing] Yeah **PARTICIPANT:** The new culture is okay, so from a personal perspective I work between the two companies, I work with Company A and I work with Company B. The Company A culture is a bit different to the Company B culture in certain aspects uhm but like I said because I work with both of them there are positives and negatives working with both of them so I'm in the middle. I think the values are binding the two companies, I definitely think – yes okay because of our branding, we were one brand and then we had to split again because the clients could not distinguish who is who, you know. Company A caters more for the lower to the middle class whereas Company B covers for the middle to upper class client so clients needed to identify which brand they can rely on or go to.
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	**INTERVIEWER: What strategies should be put in place prior to M&A?** **PARTICIPANT:** All of Company A was on PeopleSoft right **INTERVIEW:** Okay **PARTICIPANT:** So, Company B were not all onboard and as time went on the business realised that we need to get these employees on the system. **INTERVIEWER:** So this was after the merger? **PARTICIPANT:** Yes. From a Company B perspective I feel that the business should have communicated this. The business should have looked at ticking all boxes and constantly communicated to employees.
Q.1.2.2	**INTERVIEWER: What strategies should be put in place post-M&A?** **PARTICIPANT:** For a company that comes on board post-merger – the business should be time conscious to allow the other company to understand the system and requirements. You have to do a proper analysis outlining data criteria. Also change management, for employees to understand the system etc.
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?** **PARTICIPANT:** PeopleSoft as far as I know

Q.1.2.4	INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish? PARTICIPANT: Yes - other strategies would be Performance Management, Employee Self-Service, Long-Service, e-Learning, Off-Boarding, Analytics and running queries.
Q.1.2.5	INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so? PARTICIPANT: Its dependent on the person that is capturing [Laughing]. INTERVIEWER: [Laughing] So true. PARTICIPANT: I think our system is effective, especially if you know what you're doing and you know how to look and retrieve the data. What you put in is what you're going to get out - if you put in more, you're going to get out more; you know that type of thing. So basically, it will only be ineffective when employees using the system have a lack of training or with human error. But as far as I know, it is accurate.
Q.1.2.6	INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not? PARTICIPANT: As far as I know, the HRIS has been able to provide confidentiality, privacy and security of personnel information of the employees during the merger.

RQ2: How can the HRIS be utilised to achieve organisational success during M&A?

RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?

Q.2.1.1	INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics. What other modules does the HRIS have? PARTICIPANT: Yes, to all besides Time Management. Additional modules would include E-learning and Manager Self-Service.
Q.2.1.2	INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not? PARTICIPANT: I would say currently yes but as business requirements changes in the future then I would say no because uhm technology advances you obviously need to be kept updated and sometimes your technology that you're using now may become absolute in the next few years. The LMS is limited functionality from PeopleSoft so it's configurable to a certain extent but we are also dependent on Oracle PeopleSoft to provide us with updates [Coughing]. It is a very tedious process.
Q.2.1.3	INTERVIEWER: Which of the HRIS modules are frequently used by your organisation? PARTICIPANT: All of the modules.
Q.2.1.4	INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not? PARTICIPANT: Yes, I know there are upgrades and batches done but not sure how often.

| Q.2.1.5 | **INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so?**

PARTICIPANT: I'm going to say high uhm in a sense that when you look at the continuity because our HR system can be configured based on business requirements so whatever business requires – we implement on the HR system so even now that we have a total rewards system where you can actually have all of your information from your health from your retirement, your pension fund all of that in one go so depending on business requirements we can actually cater for that. So, I would say the continuity of the system depends on business requirements then for that matter and based on that – if we can contribute business requirements through continuity then I think that's where you get the success for the organisations. |
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| Q.2.1.6 | **INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so?**

PARTICIPANT: Uhm, we work a lot from the process/product owners and I think that we always get good feedback in terms of what we implement – so I'd definitely say it's High. |
| Q.2.1.7 | **INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so?**

PARTICIPANT: Uhm, from a staff perspective I would also say High because I'm not going to say Medium and the reason why I say that is because our system or any HR system is dependent on your IT infrastructure and I deal a lot with this where we think that it is a system issue and its not, it's actually an IT issue and that is why I would say from a staff perspective - I know already what to do so but I think it would be High if everything works together as one in unity then I think that you will have a good staff satisfaction so it's currently high. |
| **RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?** | |
| Q.2.2.1 | **INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?**

PARTICIPANT: I would say that there weren't any issues with the HRIS at the time, so the HRIS was able to contribute to the efficiency and effectiveness of the departmental activities during the merger - it was a very fluent transition. |
| Q.2.2.2 | **INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?**

PARTICIPANT: There are lots of benefits like looking at long-service awards, you can have a look at your confirmation of employment – it's not manually done, lots of automation was done. There are a lot of things that you can do - you don't have to go to the traffic department for your license, you can do it online. Total reward statement – you now have a holistic view of all of your benefits in one package. There are a lot of benefits that came from the integration. |
| Q.2.2.3 | **INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?**

PARTICIPANT: From a maintenance perspective – IT does a server maintenance once a month so they are in control from a server perspective to actually do the maintenance, ensuring all the data is there etc. so they usually run the show when it comes to that. From an HR perspective, because our process runs on a daily basis and depending on what type of process you're looking at – monthly, weekly, daily process that's running, so we would just make sure that those processes are running so that every transaction that gets captured will be there. |

Q.2.2.4	**INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?** **PARTICIPANT:** That's a difficult one [Laughing] Well, look – once you get used to a system you kind of don't change the system yes you can do this and that. I think that I'm satisfied with it. However, there could be, there are possibly better systems out there and as mentioned earlier technology keeps on moving so yes it might be relevant and awesome right now but a year or two years down the line there will probably be something better.
Q.2.2.5	**INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?** **PARTICIPANT:** That's also a tricky one [Laughing] the questions are getting more and more complicated. I think that we've learnt so much from our previous integrations and mergers. I think that we already know what to look for whenever there is onboarding, or new companies come on board. There could be new requirements going forward. I don't think that there is anything in the future that we haven't catered for unless something comes up – maybe the government sends out a new policy that we have to adjust to.
Q.2.2.6	**INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?** **PARTICIPANT:** Our challenges, especially when people are on different domains then it's hard for them to get onto the HR system because they obviously have to bypass certain servers and URL's and stuff like that. I definitely think by identifying uhm the access to the HR system would be something that will help the business to avoid those challenges. It is usually a massive task - so functionality can work on the system but if it doesn't work across domains then you are going to have an issue and it can be an HR system issue when it doesn't correlate to the current domains. I am currently experiencing issues with employees, they are not on the domain but they have access to the system however certain functionalities does not work – the employees cannot even access the LMS for that matter because they get blocked. We do testing and everything is working fine but it's because of their domains or their software that's loaded so those are probably things that you have to look at. So I definitely think that, that is a challenge that organisations can look at when integrating systems.
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?** **PARTICIPANT:** The first thing that comes to mind is – identifying what the companies processes are, the two companies that are merging and from there coming to a consensus for one process.
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** **PARTICIPANT:** Having a solid change management plan in place. There should have been more collaboration. From a practice perspective each business had their own practices and once the merger happened the business now needed to create one process. There should also be effective communication to the employee. There should be lots of openness and fairness in the merging process.

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Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **PARTICIPANT:** Yes Oracle PeopleSoft.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **PARTICIPANT:** Yes, all employees have employee self-service level access. Managers has Manager self-service where management can view direct reports profiles for approving leave etc. and then the HR Department has access to all departments in their respective areas as well as running required reports.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **PARTICIPANT:** Yes, through the onboarding process. Although it is a very high-level training just to familiarise employees with the system because the system is very intuitive so little to no formal training is needed.
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **PARTICIPANT:** All computers have antivirus. However, the HRIS can be accessed on any computer, domain, and electronic device.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A? So the factors are leadership, software and development, communication, change management, culture, employee turnover, performance appraisals and job satisfaction. Mention other factors that your organisation went through in HRIS implementation?** **PARTICIPANT:** Communication, change management, performance appraisals and employee turnover. Performance appraisals is impacted as you need to be cognisant on when the M&A occurs so either prior to the performance rating/review stage of after. You would then have to adjust the process accordingly and take into account the new employees that have no history or knowledge of the current process or system. Employees generally see change as a threat which results in an increase in employee turnover because of the uncertainty about the future direction of the organisation and uncertainty about personal job security.
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?** **PARTICIPANT:** Yes, the HRIS should be able to adapt to the various operational changes within the organisations.
Q.1.1.7	**INTERVIEWER: Is there effective team work and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?**

	PARTICIPANT: Yes, there is an <mark>HR analytics team and the whole HR team at large who are always prepared to test any new functions being implemented.</mark>
Q.1.1.8	**INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?** **PARTICIPANT:** <mark>Low</mark>. This is due to the fact that <mark>the system often does not perform at an optimum level. Many features aren't used on the system.</mark>
Q.1.1.9	**INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?** **PARTICIPANT:** <mark>No</mark> not really.
Q.1.1.10	**INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not?** **PARTICIPANT:** <mark>New culture is the same as the company that had the most employees as they moved over to their offices.</mark>
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	**INTERVIEWER: What strategies should be put in place prior to M&A?** **PARTICIPANT:** <mark>Ensure that change management is implemented, ensure that both companies are trained on systems, know about values and change.</mark>
Q.1.2.2	**INTERVIEWER: What strategies should be put in place post-M&A?** **PARTICIPANT:** <mark>Constant change management and communication. Ensuring all employees are aligned in terms of new process and systems.</mark>
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?** **PARTICIPANT:** <mark>PeopleSoft</mark> was used and another system called <mark>Oracle E-business Suite.</mark>
Q.1.2.4	**INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?** **PARTICIPANT:** <mark>Yes</mark>, as well as <mark>Legislative reporting.</mark>
Q.1.2.5	**INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?** **PARTICIPANT:** Quite <mark>effective and easy</mark>. The <mark>reports are grouped according to the discipline - capturing and changing data is recorded live</mark>, which <mark>ensures accuracy.</mark>
Q.1.2.6	**INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?** **PARTICIPANT:** <mark>Yes</mark>, only the <mark>HR and finance department has access to view employee data and payroll information.</mark>
RQ2: How can the HRIS be utilised to achieve organisational success during M&A?	
RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?	

Q.2.1.1	INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics. What other modules does the HRIS have? PARTICIPANT: All of the modules besides time management – this is done via biometric systems and is not captured on the HRIS. Other modules would be Management Self-service.
Q.2.1.2	INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not? PARTICIPANT: I do not think all the modules suit the business. Not all modules on the system are being utilised efficiently and effectively. This could possibly be around lack of training and being unaware of all the functionalities that the system offers. Although I should add that before the merger even less functionalities was used. Many processes has been streamlined after the merger for example, the ESS module user interface has improved as well as the payroll functionality – employees can now view more than just a payslip.
Q.2.1.3	INTERVIEWER: Which of the HRIS modules are frequently used by your organisation? PARTICIPANT: Recruiting, Reporting and Payroll.
Q.2.1.4	INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not? PARTICIPANT: We do but not very often. I think the last update was around 2016.
Q.2.1.5	INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so? PARTICIPANT: High, full dependence of employee data and payroll is on the HRIS. Although, it does depend on the accuracy of the data being captured on the system as HR decision making stems from this data.
Q.2.1.6	INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so? PARTICIPANT: Low – Management do not have full confidence in the system. Specifically, the User Experience of the system. There is still a lot of push back from management to do things via the system instead of doing things manually.
Q.2.1.7	INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so? PARTICIPANT: Medium, after the merger the system was upgraded in terms of the user interface and system navigation.
RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?	
Q.2.2.1	INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not? PARTICIPANT: Yes, capturing and transferring of employee data prior to the Merger. Ensuring the accuracy of benefits and Tax calculations of employees not being affected.
Q.2.2.2	INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?

	PARTICIPANT: <mark>Centralisation of payroll function</mark> as well as <mark>ensuring that the audit and clean data on the system</mark>.
Q.2.2.3	**INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?** **PARTICIPANT:** Yes, <mark>we do have an integration and maintenance plan</mark>. We do <mark>server maintenance on a monthly basis</mark> and <mark>database management is done on a weekly basis</mark>.
Q.2.2.4	**INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?** **PARTICIPANT:** Yes, the <mark>system is not only effective for payroll purposes but the entire HR value chain as well.</mark> I think the <mark>user interface could be more intuitive, better integration between systems and real-time reporting.</mark>
Q.2.2.5	**INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?** **PARTICIPANT:** The <mark>HRIS is expected to integrate with other HR systems in order for one central input and maintenance of data to transfer to all systems being used in the business.</mark>
Q.2.2.6	**INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?** **PARTICIPANT:** <mark>API access of the systems,</mark> <mark>coordination between the stakeholders of the systems within the business.</mark>
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?** **PARTICIPANT:** <mark>Ensure that all data prior to the merger is kept for future reference. Prepare the system for any anomalies or payroll components that the companies might have that the current company does not have.</mark>
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** **PARTICIPANT:** <mark>More time to get the HR department prepared in terms of ensuring the system is able to accommodate payment structures as well as change management.</mark>

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Question	Response
RQ1: What are the reasons for ineffective HRIS implementation in organisations during M&A?	
RSQ 1.1: What are the factors influencing the effective integration of an HRIS during M&A?	
Q.1.1.1	**INTERVIEWER: Does your organisation make use of an HRIS? If yes, what is the name of the HRIS? If no, why not?** **RESPONDENT:** Yes, the organisation makes use of Oracle PeopleSoft.
Q.1.1.2	**INTERVIEWER: Do all the employees have access to the HRIS? If yes, what level of access? If no, why not?** **RESPONDENT:** Yes, all employees that are paid through our payroll have access to PeopleSoft. The level of access would then be dependent on your role within the organisation except for independent contractors, these employees does not have access to the system.
Q.1.1.3	**INTERVIEWER: Does your organisation conduct any form of training to equip the users on how to make good use of the HRIS? If yes, how? If no, why not?** **RESPONDENT:** Yes uhm, adequate training is provided to all employees pertaining to the use of the system and also when there are new functionalities on the system.
Q.1.1.4	**INTERVIEWER: Is there effective information security in place to safeguard the HRIS? If yes, what kind? If no, why not? (e.g. software against computer hacking and anti-virus)** **RESPONDENT:** Yes, there is software protection installed and the system is password protected.
Q.1.1.5	**INTERVIEWER: Identify the critical factors that your organisation experienced throughout the integration process of the HRIS during M&A? So the factors are leadership, software and development, communication, change management, culture, employee turnover, performance appraisals and job satisfaction. Mention other factors that your organisation went through in HRIS implementation?** **RESPONDENT:** All factors were experienced throughout the integration process of the HRIS.
Q.1.1.6	**INTERVIEWER: Does the size of your organisation and its operations determine the effectiveness of the HRIS? If yes, why do you say so? If no, why not?** **RESPONDENT:** Yes, it does determine the effectiveness of the HRIS because in my view there would be more users on the system. The business would need to streamline more HR processes for employees to be able to access various information. For example, the mobile app was developed so that employees would not depend on correspondence from HR to retrieve documents such as confirmation of employment letters, IRP5's, payslips etc.
Q.1.1.7	**INTERVIEWER: Is there effective team work and staff participation in your organisation to support the implementation process of the HRIS? If yes, why do you say so? And If no, why not?** **RESPONDENT:** Yes, the HRIS works integrated with staff participation which supported the implementation process.

Q.1.1.8	**INTERVIEWER: Does management have confidence and trust in the HRIS in terms of usage and performance? If yes, what is the level of trust? (High, Medium, Low). Why do you say so?** **RESPONDENT:** I would say ==Medium==, but it would ==depend on what area of the business these managers are located.== I ==don't think that all managers are aware of the functionality on the system.==
Q.1.1.9	**INTERVIEWER: Did a new culture present itself after the merger? If yes, why do you say so? If no, why not?** **RESPONDENT:** Yes, ==a new sense of culture has developed after the merger== took place. A more ==modern approach to business and operations began to develop within the organisation==.
Q.1.1.10	**INTERVIEWER: What is your opinion of the new culture? If yes, why do you say so? If no, why not?** **RESPONDENT:** My personal opinion regarding the new culture is ==overall positive as adapting to changes in the industry as a whole is being facilitated by the organisation.==
RSQ 1.2: What strategies have organisations used in HRIS integration during M&A?	
Q.1.2.1	**INTERVIEWER: What strategies should be put in place prior to M&A?** **RESPONDENT:** ==Getting IT and business on the same page early. Data is what drives decisions throughout the organisation so it would be important to identify commonalities and discrepancies with the data and then aligning to the current data set.== I would also say ==there should be sufficient planning in place for the integration of the system, determine which system will be adopted and create a roadmap detailing who will be involved==, which tasks need to be completed and outline a timeline for completion. Lastly, I think that a ==communication plan to the business should also be created to outline various milestones.==
Q.1.2.2	**INTERVIEWER: What strategies should be put in place post-M&A?** **RESPONDENT:** I would say that ==success factors should be clearly defined which will be a guide to all integration efforts== for example ==ensuring culture integrations, emphasising communication, retention plans and alignment of strategies.==
Q.1.2.3	**INTERVIEWER: What HRIS system was used prior to the M&A?** **RESPONDENT:** ==Oracle PeopleSoft== was used by Company A but I'm not sure which system was used by Company B.
Q.1.2.4	**INTERVIEWER: Does the implementation of the HRIS assist your organisation to accomplish the following strategies listed below? Recruitment and selection, training and development, recognition and rewards, and payroll. What other strategies does your organisation accomplish?** **RESPONDENT:** Yes, the ==implementation of the HRIS allowed the business to accomplish all the strategies.==
Q.1.2.5	**INTERVIEWER: How effective is the capturing, recording and retrieval of data from the HRIS? Why do you say so?** **RESPONDENT:** It is very ==effective==, we also ==started using Qlikview for reporting and visualisation.==
Q.1.2.6	**INTERVIEWER: Has the HRIS been able to provide confidentiality, privacy and security of personnel information of the employees during the M&A? If yes, how do you know? If no, why not?**

	RESPONDENT: Yes – so PeopleSoft has various levels of access and the data is also stored in a SQL database which makes it harder to get access to the data unless you have direct access to the database but I do think that the security around access to the database is very strict.
RQ2: How can the HRIS be utilised to achieve organisational success during M&A?	
RSQ 2.1: What are the HRIS modules needed in the financial sector to have an effective system in place?	
Q.2.1.1	INTERVIEWER: Indicate which of these modules are implemented by the HRIS of your organisation? Payroll, time management, benefit administration i.e. retirement, medical aid, recruitment and selection, performance, employee self-service, analytics. What other modules does the HRIS have? RESPONDENT: All modules are implemented by PeopleSoft. The system also has modules for e-Learning and Manager Self-Service.
Q.2.1.2	INTERVIEWER: Do the current HRIS modules suit the kind of business that your organisation operates in? If yes, how? If no, why not? RESPONDENT: No, the current HRIS modules do not suit the business. I'm sure we can explore more functionalities on the system as well or streamline more HR processes. If I look at the recruitment ATSs that are currently available our recruitment functionality just does not compare. There have been some upgrades around the recruitment module on PeopleSoft but there is so much more that can be done.
Q.2.1.3	INTERVIEWER: Which of the HRIS modules are frequently used by your organisation? RESPONDENT: All of the modules are frequently used by the business. I would say that some modules are used more frequently than others such as recruitment and payroll.
Q.2.1.4	INTERVIEWER: Does your organisation upgrade the HRIS and software development? If yes, how often and why? If no, why not? RESPONDENT: Yes, we do but I don't think we upgrade often as it is a very time-consuming process, and I would assume costly too.
Q.2.1.5	INTERVIEWER: How would you rate the contribution of HRIS to the continuity and success of your organisation? From high, medium to low and why do you say so? RESPONDENT: High, I think after certain processes were automated, the user interface was upgraded and the mobile app was introduced - this increased the usage of the system. The data available on the system is valuable to make data driven decision making for example, identifying attrition rates based on the number of resignations, identifying gender discrepancies. HRIS is also a very valuable system within an organisation as it helps administer the organisation.
Q.2.1.6	INTERVIEWER: How would you rate management satisfaction with the HRIS? From high, medium to low and why do you say so? RESPONDENT: Medium because there are always improvements to be made to certain processes and the system.
Q.2.1.7	INTERVIEWER: How would you rate staff satisfaction with the HRIS? From high, medium to low and why do you say so? RESPONDENT: Medium, I think that staff satisfaction definitely plummeted after the introduction of the mobile app. The system became more user friendly, and employees became more familiar with its functionality.

RSQ 2.2: How do organisations utilise their HRIS during M&A to achieve the benefit thereof in the financial sector?	
Q.2.2.1	**INTERVIEWER: Was the HRIS able to contribute to the efficiency and effectiveness of your departmental activities during the M&A? If yes, how? If no, why not?** RESPONDENT: Yes – everything was operating normally.
Q.2.2.2	**INTERVIEWER: What are the benefits that you could identify your organisation has been able to achieve with the integration of an HRIS during the M&A?** RESPONDENT: Employee self-service definitely improves employee empowerment and engagement, data analytics assists the organisation to make more informed decisions, assists with quickly recruiting new employees, reduces paperwork, helps the organisation to keep up with any compliance regulations and it improves operational efficiency as it simplifies how the business tracks, updates and reports on employee data.
Q.2.2.3	**INTERVIEWER: Does your organisation have any form of policy, guideline or framework in place for effective integration and maintenance of the HRIS? If yes, mention? If no, why not?** RESPONDENT: Yes, I'm sure the organisation has policies for integration and maintenance.
Q.2.2.4	**INTERVIEWER: Are you satisfied with the HRIS or will you recommend that your organisation acquire an alternative system for effective performance, and why?** RESPONDENT: Yes – PeopleSoft provides the tools for customising and automating processes to match existing business processes. However, certain processes such as Performance Excellence can be improved.
Q.2.2.5	**INTERVIEWER: What are the future expectations of your organisation with regard to the integration and maintenance of the HRIS?** RESPONDENT: Uhm, probably integrating PeopleSoft with various systems such as an applicant tracking system for recruitment and also streamlining our current processes.
Q.2.2.6	**INTERVIEWER: What can assist you to overcome the integration challenges you are currently facing?** RESPONDENT: I think the biggest issue that we're experiencing now is the failure to consider moving to the cloud. This will reduce any potential future integration and security risks.
Q.2.2.7	**INTERVIEWER: What can help you overcome the merger-related impact on HRIS integration processes as a lesson for the future?** RESPONDENT: Involving all relevant participants from the start of the project and essentially having a solid plan of action in place. Not rushing the process, be prepared for a culture shift and change.
Q.2.2.8	**INTERVIEWER: What structures or processes should have been put in place to ensure a streamline integration process during the M&A?** RESPONDENT: Decide on IT for the integrated company early, rigorously manage cultural integration and change management and communicate – it's better to have too much communication than too little. I think it's also very important to capture all merger and acquisition lessons learned so that the business is prepared for any other potential mergers.

APPENDIX D: SUMMARY OF FINDINGS FOR COMPANY A

RQ	SRQ	IQ	Finding	Description
1	1.1	1.1.1	1	PeopleSoft was used as the HRIS in Company A
1	1.1	1.1.2	2	Not all employees of Company A had access to the Oracle PeopleSoft system
1	1.1	1.1.3	3	There was a lack of formal training in Company A
1	1.1	1.1.3	4	There is uncertainty around the type of training provided and a confidentiality agreement is signed before access is granted to sensitive information
1	1.1	1.1.3	5	The most intuitive systems can seem imposing when employees and managers are unfamiliar with the appearance, functions and processes of the system
1	1.1	1.1.3	6	Not all employees and managers are involved in the implementation and adoption of the system
1	1.1	1.1.4	7	There was information security in place to safeguard Oracle PeopleSoft at Company A
1	1.1	1.1.4	8	Access to the system was limited through a secure username and password
1	1.1	1.1.5	9	Leadership was identified as a critical factor
1	1.1	1.1.5	10	The lack of a software and development plan impacted on integration
1	1.1	1.1.5	11	Lack of communication resulted in misinterpretation, mistrust, low morale and low productivity
1	1.1	1.1.5	12	There was a change management process in place but it was not effective, and this had an impact on other factors in the company
1	1.1	1.1.5	13	Culture stood in the way of some of the transitions and changes
1	1.1	1.1.5	14	Employee turnover was high because of the uncertainty
1	1.1	1.1.6	15	Job satisfaction was negatively affected because of uncertainty, changes in management, the fear of downsizing and potential job losses
1	1.1	1.1.6	16	The size of the business added more complexity but did not determine the effectiveness of the HRIS
1	1.1	1.1.6	17	The effectiveness of the HRIS is dependent on the maturity across different HR processes
1	1.1	1.1.7	18	Not all departments were participating and had good teamwork in place
1	1.1	1.1.8	19	Management's confidence and trust in the system is negatively affected by limited exposure to certain functionalities of the system, incorrect data and insufficient training on new processes
1	1.1	1.1.9	20	Creating a unified culture during a merger is important
1	1.1	1.1.9	21	Culture clashes happened during the merger
1	1.1	1.1.9	22	There is an objective to create one culture after the merger
1	1.1	1.1.10	23	A new culture did not develop during the merger
1	1.2	1.2.1	24	Both companies had different HR practices
1	1.2	1.2.1	25	One HR strategy was not created prior to the M&A
1	1.2	1.2.2	26	Strategies that should be put in place post-merger are change management, communication, and implementing an HR strategy that takes in to account the maturity of HR processes and training
1	1.2	1.2.3	27	Oracle PeopleSoft and Oracle E-business Suite was both used prior to the merger. Oracle PeopleSoft was chosen as the system
1	1.2	1.2.4	28	Recruitment and selection, training and development, recognition and rewards as well as payroll were all accomplished by the HRIS
1	1.2	1.2.4	29	Other business processes mentioned were performance, pre-onboarding and talent management
1	1.2	1.2.5	30	Keeping data up to date and correct is a challenge
1	1.2	1.2.6	31	The HRIS provides confidentiality, privacy and security
2	2.1	2.1.1	32	All modules besides time management are being utilised on the system
2	2.1	2.1.1	33	The e-Learning functionality is not hosted on PeopleSoft
2	2.1	2.1.1	34	There is limited use of the analytical functionalities and majority of analytics is done via Qlikview
2	2.1	2.1.2	35	The modules suit the business but there is a need for modification
2	2.1	2.1.2	36	Not all modules are being utilised efficiently and effectively
2	2.1	2.1.3	37	Most modules of the system are being used by the organisation but some are used more often than others

RQ	SRQ	IQ	Finding	Description
2	2.1	2.1.4	38	PeopleSoft is not regularly upgraded
2	2.1	2.1.4	39	It is a massive exercise to upgrade PeopleSoft because all of the customisation would need to be rebuilt
2	2.1	2.1.4	40	IT does not support PeopleSoft. PeopleSoft has their own support team
2	2.1	2.1.5	41	HRIS is a contributor to the continuity and success of the organisation
2	2.1	2.1.5	42	The business is not utilising predictive analysis via PeopleSoft
2	2.1	2.1.5	43	HR decision making stems from accurate data on the system
2	2.1	2.1.6	44	Management's satisfaction is rated as medium for PeopleSoft
2	2.1	2.1.6	45	Management's input to the HRIS is ignored
2	2.1	2.1.6	46	Management still believes in manual processes
2	2.1	2.1.7	47	Staff satisfaction with the use of the system is generally rated as medium
2	2.1	2.1.7	48	Before the merger the UX and UI on PeopleSoft were not intuitive
2	2.2	2.2.1	49	The HRIS contributed to the efficiency and effectiveness through business process automation and reporting during the merger
2	2.2	2.2.1	50	Implementing benefit alignment is an important step in merging two companies
2	2.2	2.2.2	51	Benefits identified are usability, scalability, enabling the business to facilitate workforce management, managing human resources and talent management, one central system, data-enabling decision making, automation of HR processes, one version of the truth, more user control than before the merger, and an increase in cost effectiveness
2	2.2	2.2.3	52	There are policies in place for maintenance but no guidelines or framework for effective integration
2	2.2	2.2.4	53	Improvements and enhancements can be made to the user interface and certain processes to increase user satisfaction
2	2.2	2.2.4	54	From a transactional perspective, PeopleSoft delivers on business requirements but in the future, the business will start integrating more advanced systems for other functionalities
2	2.2	2.2.4	55	To improve employee satisfaction, the system could be more intuitive and better integration between other systems and real-time reporting
2	2.2	2.2.5	56	Future expectations identified by participants include: automation and integration; improving e-Learning module; allowing employees and management as much control of the system as possible; adopting new capabilities and technologies, i.e., artificial intelligence; ensuring that process efficiencies are in place; making the system more stable; providing better training; providing information on different access level capabilities; integration of line of business systems with PeopleSoft; and data to transfer to all systems being used in the business
2	2.2	2.2.6	57	Adding more restrictive fields when capturing information to enable accurate data
2	2.2	2.2.6	58	Having a proper change management plan will allow the business to focus on priorities
2	2.2	2.2.6	59	Training and support will help overcome integration challenges
2	2.2	2.2.6	60	Having API access across systems will allow for the coordination between various systems used within the business
2	2.2	2.2.6	61	Users have different domains because of the merger, and this has an impact on access to PeopleSoft
2	2.2	2.2.7	62	Plan before integrating and implementing systems within the business
2	2.2	2.2.7	63	IT to be part of merger-related discussions from the start
2	2.2	2.2.7	64	HR/IT communication needs to happen early, not when the merger-related discussion is done
2	2.2	2.2.7	65	Consider benefit alignment upfront
2	2.2	2.2.7	66	Identifying commonalities in data and the approaches to sharing data to reduce errors, standardising data across the business
2	2.2	2.2.7	67	Understanding the various systems used within the business and how each system integrates with each other
2	2.2	2.2.7	68	Having a post-project review in place
2	2.2	2.2.7	69	Ensure transparency and effective communication
2	2.2	2.2.7	70	Come to a consensus for one process across the business
2	2.2	2.2.7	71	Keep any merger-related data for future anomalies
2	2.2	2.2.7	72	Prepare the system for anomalies and components that the merging company has and the current company does not have
2	2.2	2.2.8	73	Having a solid change management plan in place, communication and transparency
2	2.2	2.2.8	74	Providing support to staff in terms of counselling

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RQ	SRQ	IQ	Finding	Description
2	2.2	2.2.8	75	Doing benefit alignment of medical aid and pension fund upfront
2	2.2	2.2.8	76	Establish one business process/practice from the start
2	2.2	2.2.8	77	Ensure the system is able to accommodate payment structures

IQ = Interview question; RQ= Research question; RSQ = Research sub-question

APPENDIX E: SUMMARY OF FINDINGS FOR COMPANY B

RQ	SRQ	IQ	Finding	
1	1.1	1.1.1	78	PeopleSoft is used as the HRIS and post-merger EBS was utilised prior to the merger
1	1.1	1.1.2	79	Not all employees has access to the HRIS
1	1.1	1.1.2	80	Access to the HRIS is dependent on the job function and the usage of the system
1	1.1	1.1.2	81	There is uncertainty about the access of employees to the HRIS system
1	1.1	1.1.3	82	There is no formal training programme in place
1	1.1	1.1.4	83	There is information security in place to safeguard Oracle PeopleSoft
1	1.1	1.1.5	84	There was no quality information being shared by leadership
1	1.1	1.1.5	85	There was a lack of a software and development
1	1.1	1.1.5	86	There was a lack of quality communication during the merger
1	1.1	1.1.5	87	There was a lack of a good change management strategy
1	1.1	1.1.5	88	Differences in culture resulted in a gap in communication and affected the performance of employees
1	1.1	1.1.5	89	Employee turnover was high because of the uncertainty
1	1.1	1.1.5	90	Job satisfaction was affected in terms of uncertainty, changes in management and the fear of downsizing and potential job losses
1	1.1	1.1.5	91	Unfamiliarity regarding the system itself caused a lot of frustration and conflict
1	1.1	1.1.6	92	The size of the business can impact the effectiveness of the system in terms of how the business manages operations
1	1.1	1.1.6	93	The HR processes are not streamlined
1	1.1	1.1.7	94	Teamwork and staff participation differed from business unit to business unit
1	1.1	1.1.7	95	Holistically there was not enough support and teamwork in terms of the implementation process of the HRIS
1	1.1	1.1.7	96	There was no proper training on how to use the system
1	1.1	1.1.8	97	Managers are only exposed to certain functionalities on the system
1	1.1	1.1.8	98	Managers does not receive sufficient training around new processes on the system
1	1.1	1.1.8	99	Management trust levels are on a medium scale for the HRIS system
1	1.1	1.1.9	100	A new culture did not immediately emerge after the M&A
1	1.1	1.1.9	101	The business operates in silos after the merger
1	1.1	1.1.9	102	After the merger, a more modern approach to business was developed within the organisation
1	1.1	1.1.10	103	There is a culture of silos scattered in the business
1	1.2	1.2.1	104	HR and IT should be involved as soon as there are discussions about merging
1	1.2	1.2.1	105	There is no change management and IT integration plan
1	1.2	1.2.1	106	Communication, planning, research and training are important strategies
1	1.2	1.2.1	107	There was a lack of a strategic consultancy process
1	1.2	1.2.1	108	There was no business-IT alignment strategy
1	1.2	1.2.2	109	Evaluation strategies and rolling out initiatives to address the barriers and to prepare for future mergers
1	1.2	1.2.2	110	Ensure there is a proper HR strategy in place
1	1.2	1.2.2	111	Use the system to generate satisfaction among the business and also to create a shared vision among the employees
1	1.2	1.2.2	112	Have support services in place and a platform that encourages feedback for improvement on various processes on the system
1	1.2	1.2.2	113	Effective change management, training, transparency and constant communication
1	1.2	1.2.2	114	Success factors should be clearly defined to guide integration efforts
1	1.2	1.2.3	115	Oracle PeopleSoft is and Oracle E-business Suite was used
1	1.2	1.2.4	116	The HRIS has made things more effective from an HR perspective
1	1.2	1.2.4	117	Fourteen additional business processes were identified
1	1.2	1.2.5	118	There is a risk of data being captured incorrectly
1	1.2	1.2.5	119	Different processes are being followed by employees when capturing data

RQ	SRQ	IQ	Finding	
1	1.2	1.2.6	120	The users of the system signs a confidentiality agreement in order to protect the data on the system
1	1.2	1.2.6	121	Confidentiality is provided by the system in terms of access, but privacy can be compromised around the manual aspect
2	2.1	2.1.1	122	All modules are being utilised on the system except for time management
2	2.1	2.1.2	123	The modules suit the business because it is customizable and affordable
2	2.1	2.1.2	124	The system can be enhanced and improved to allow for better flow and consistency
2	2.1	2.1.2	125	The e-Learning functionality does not align with industry requirements
2	2.1	2.1.3	126	All the modules on the system are being used by the organisation but some are used more often than others
2	2.1	2.1.4	127	The HRIS is upgraded as often as possible aligned to business requirements, but it is costly
2	2.1	2.1.5	128	The system is crucial for the employee life cycle and addresses business needs
2	2.1	2.1.6	129	Management satisfaction is seen as medium in nature
2	2.1	2.1.7	130	The employees are satisfied with the HRIS
2	2.2	2.2.1	131	The HRIS was able to the efficiently and effectively contribute to departmental activities during the M&A
2	2.2	2.2.2	132	The benefits identified are consolidated view, mobile solution, one platform, knowledge transfer, streamlining, automating processes, recruitment and selection, and employee self-service
2	2.2	2.2.3	133	There is uncertainty of the guidelines and frameworks in place in the organisation in terms of the name and where it is housed
2	2.2	2.2.4	134	The majority of participants are satisfied with the HRIS
2	2.2	2.2.4	135	The HRIS is seen as complicated a complex system
2	2.2	2.2.5	136	The future expectations are: new technologies and APIs, business process management improvements, system integration, digitisation and simplification, AI, change management and recruitment tracking
2	2.2	2.2.6	137	Change adoption, planning, training, data integrity, getting employee input into system decisions, improving learning and management system, system is tedious with too many clicks
2	2.2	2.2.7	138	Change and adoption, processes and systems, system communication, communication, transparency, system choice, holistic employee involvement, and holistic employee involvement
2	2.2	2.2.8	139	The following structures and processes were identified: collaboration, data management, change management, benefit alignment, outsourcing, integration and automation, training, and culture management

IQ = Interview question; RQ= Research question; RSQ = Research sub-question

APPENDIX F: SUMMARY OF FINDINGS FOR COMPANY C

IQ	Finding number	Findings
1.1.1	1, 78	PeopleSoft is used as the HRIS
1.1.2	2, 79,80,81	There is uncertainty about access to the system
1.1.3	3,4,5,82	There is a lack of formal training
1.1.4	7,8,83	Information security is in place for HRIS
1.1.5	14, 89	Employee turnover was high because of the uncertainty
1.1.5	9.84	Leadership communication a problem
1.1.5	12, 87	Lack of change management strategy
1.1.5	10, 85	The lack of a software and development plan impacted integration
1.1.5	13, 88	Cultural difference negatively impacted merger
1.1.5	11,86	There was a lack of quality communication during the merger
1.1.5	15,9	Lack of job satisfaction
1.1.5	91	Conflict and frustration due to unfamiliarity of HRIS
1.1.6	16,92	The size of the business added more complexity but did not determine the effectiveness of the HRIS
1.1.6	17,93	The effectiveness of the HRIS is dependent on the maturity across different HR processes and not streamlined
1.1.7	18, 94,95	Teamwork was lacking during the merger
1.1.7	96	Lack of training on HRIS
1.1.8	19,97,98,99	Management's confidence and trust in the system is negatively impacted by limited exposure to certain functionalities on the system, incorrect data and insufficient training on new processes
1.1.9	20,21,22,100,101,102	An unified company culture was slow to develop hampering the merger implementation
1.1.10	23,103	There was a lack of culture and value alignment
1.2.1	24, 106	Communication, planning, research and training are important strategies
1.2.1	25,104,105,107	All departments need to be involved at the beginning of the merger process
1.2.1	108	There was no business-IT alignment strategy
1.2.2	26,109,110,111,112,113,114	Management must have strategic plans in place at beginning of merger
1.2.3	27,115	Oracle PeopleSoft is and Oracle E-business Suite was used
1.2.4	28,29,117	Several HR strategies were identified
1.2.5	31,120,121	Confidentiality is provided by the system in terms of access but privacy can be compromised around the manual aspect
2.1.1	32,122	Most modules of the system are utilised
2.1.1	33,34	time management, eLearning, and analytics not utilised
2.1.2	35,36,123,124,125	Some modules need to be modify to fulfil business needs
2.1.3	37,126	Most modules on the system are being used by the organisation but some are used more often than others
2.1.4	38,39,40,127	PeopleSoft is not regularly upgraded
2.1.5	41,128	HRIS is a contributor to the continuity and success of the organisation
2.1.5	42	The business is not utilising predictive analysis via PeopleSoft
2.1.5	44.45,46,129	Management satisfaction is seen as medium in nature
2.1.5	47,48,130	The employees are satisfied with the HRIS
2.2.1	49,50,131	The HRIS is able to the efficiently and effectively contribute to departmental activities during the M&A
2.2.1	51,132	The benefits identified are consolidated view, mobile solution, one platform, knowledge transfer, streamlining, automating processes, recruitment and selection, and employee self-service
2.1.2	35,36,123,124,125	Some modules need to be modify to fulfil business needs
2.2.3	52,133	There is uncertainty of the guidelines and frameworks that are in place in the organisation around the name and where it is housed
2.2.4	53,134	Majority of Ps are satisfied with the HRIS

IQ	Finding number	Findings
	55	To improve employee satisfaction, the system could be more intuitive, better integration between other systems and real-time reporting
	54,135	The HRIS is seen as complicated a complex system
2.2.5	56,136	The future expectation are: New technologies and APIs, Business process management improvements, System integration, Digitization and simplification, AI, Change management and Recruitment tracking
2.2.6	57,58,59,60,61,137	Change adoption should be emphasized. Better planning and regular training. Understanding other business systems. Data integrity, good change management and API access.
2.2.7	62,62,63,64,65,66,67.68, 138	Planning, benefit alignment, standardize data integrity, HR/IT to be part of merger related discussions, post project review, effective communication, business process management, user experience and change management.
2.2.8	73,74,75,76,77,139	The following structures and processes were identified: collaboration, data management, change management, benefit alignment, outsourcing, integration and automation, training, and culture management

IQ = Interview question; RQ= Research question; RSQ = Research sub-question

APPENDIX G: DEVELOPMENT OF CATEGORIES

Finding number	Findings	Recoded 1	Recoded 2	Categories
73,74,75,76,77,139	The following structures and processes were identified: collaboration, data management, change management, benefit alignment, outsourcing, integration and automation, training, and culture management	Business structure and processes	Business structure and processes	Business structure and processes
35,36,123,124,125	Some modules need to be modify to fulfil business needs	HRIS modification	Policies and guidelines	Business /IT alignment
108	There was no business-IT alignment strategy	Business /IT alignment	Business /IT alignment	Change management
12, 87	Lack of change management strategy	Change management	Change management	Communication
11.86	There was a lack of quality communication during the merger	Communication	Communication	Culture
13, 88	Cultural difference negatively impacted merger	Culture	Culture	Employee management
20,21,22,100,101,102	An unified company culture was slow to develop hampering the merger implementation	Culture	Employee satisfaction	Future expectation
23.103	There was a lack of culture and value alignment	Culture	Employee turnover	HR management
47,48,130	The employees are satisfied with the HRIS	Employee satisfaction	Future expectation	HR system
53.134	Majority of Ps are satisfied with the HRIS	Employee satisfaction	HR	IT management
55	To improve employee satisfaction, the system could be more intuitive, better integration between other systems and real-time reporting	Employee satisfaction	HRIS	Job satisfaction
14, 89	Employee turnover was high because of the uncertainty	Employee turnover	HRIS complexity	Leadership
56.136	The future expectation are: New technologies and APIs, Business process management improvements, System integration, Digitisation and simplification, AI, change management and recruitment tracking	Future expectation	HRIS knowledge	M&A
28,29,117	Several HR strategies were identified	HR	HRIS modification	Management
16.92	The size of the business added more complexity but did not determine the effectiveness of the HRIS	HRIS	HRIS upgrade	Organisation
17.93	The effectiveness of the HRIS is dependent on the maturity across different HR processes and not streamlined	HRIS	HRIS utilisation	Software development
38,39,40,127	PeopleSoft is not regularly upgraded	HRIS upgrade	Security	Strategies
27.115	Oracle PeopleSoft is and Oracle E-business Suite was used	HRIS	Job satisfaction	Teamwork
49,50,131	The HRIS is able to the efficiently and effectively contribute to departmental activities during the M&A	HRIS	Leadership	Training
54.135	The HRIS is seen as complicated a complex system	HRIS complexity	Merger process	
51.132	The benefits identified are consolidated view, mobile solution, one platform, knowledge transfer, streamlining, automating processes, recruitment and selection, and employee self-service	HRIS	Management	
91	Conflict and frustration due to unfamiliarity of HRIS	HRIS knowledge	Organisation	
32.122	Most modules of the system are utilised	HRIS utilisation	Software development	

Finding number	Findings	Recoded 1	Recoded 2	Categories
33,34,	time management, eLearning, and analytics not utilised	HRIS utilisation	Strategies	
35,36,123,124,125	Some modules need to be modify to fulfil business needs	HRIS utilisation	Teamwork	
37.126	Most modules on the system are being used by the organisation but some are used more often than others	HRIS utilisation	Training	
42	The business is not utilising predictive analysis via PeopleSoft	HRIS utilisation	Strategies	
15.9	Lack of job satisfaction	Job satisfaction	Management	
9.84	Leadership communication a problem	Leadership	Leadership	
19,97,98,99	Management's confidence and trust in the system is negatively impacted by limited exposure to certain functionalities on the system, incorrect data and insufficient training on new processes	Management	Management	
26,109,110,111,112,113,114	Management must have strategic plans in place at beginning of merger	Management	Management	
44.45,46,129	Management satisfaction is seen as medium in nature	Management	Management	
25,104,105,107	All departments need to be involved at the beginning of the merger process	Merger process	Policies and guidelines	
41.128	HRIS is a contributor to the continuity and success of the organisation	Organisation	Organisations	
52.133	There is uncertainty of the guidelines and frameworks that are in place in the organisation around the name and where it is housed	Policies and guidelines	Policies and guidelines	
2, 79,80,81	There is uncertainty about access to the HRIS	Security	Security	
7,8,83	Information security is in place for HRIS	Security	Security	
31,120,121	Confidentiality is provided by the system in terms of access but privacy can be compromised around the manual aspect	Security	Security	
10, 85	The lack of a software and development plan impacted integration	Software development	Software development	
24, 106	Communication, planning, research and training are important strategies	Strategies	Policies and guidelines	
18, 94,95	Teamwork was lacking during the merger	Teamwork	Teamwork	
96	Lack of training on HRIS	Training	Training	
3,4,5,82	There is a lack of formal training	Training	Training	
1, 78	PeopleSoft is used as the HRIS	HRIS	HRIS	

IQ = Interview question; RQ= Research question; RSQ = Research Sub-question

APPENDIX H: EDITING CERTIFICATE

8 March 2022

MIESHKA PAULSE
Faculty of Business and Management Sciences
Cape Peninsula University of Technology
Cape Town

RE: EDITING CERTIFICATE - MASTER'S THESIS

I, the undersigned, herewith certify that the editing of the Master's thesis of Mieshka Paulse, *"THE EFFECT OF HRIS ON THE MERGER OF A SELECTED FINANCIAL INSTITUTION IN THE WESTERN CAPE"*, has been conducted and concluded.

The finalised thesis was submitted to Ms Paulse and cc'd to Prof. Andre de la Harpe on 8 March 2022.

Sincerely

Professor Annelie Jordaan
DTech: Information Technology
Ph: 065 990 8713

Member: SATI 1003347

South African Translators' Institute (SATI)

APPENDIX I: COMPANY CONSENT

[REDACTED]

18 October 2018

On behalf of [REDACTED] I formally indicate our awareness of the research proposed by Mieshka Paulse, a student at Cape Peninsula University of Technology. We are aware that Mieshka intends to conduct her research at [REDACTED] The student has explained to me the nature of her research and the nature of the data to be collected.

I, [REDACTED] grant Mieshka Paulse permission to conduct her research at [REDACTED] [REDACTED]

This consent in no way commits any individual employee to participate in the research, and it is expected that the student will get consent from any participants. I reserve the right to withdraw this permission at any time in the future. Research will be done on the time and dates as agreed with the student.

In addition, the company's name may be used as indicated below:
- Thesis
- Conference paper
- Journal article

If you have any questions or concerns, please feel free to contact my office at [REDACTED]

Sincerely,

Wilson

[REDACTED]

Shared Services Centre Manager

[REDACTED]

13 - 10 - 2018
Date

[REDACTED]