



# The Role of the Project Management Office in Post-Merger Integration: A Qualitative Case Study of a Large-Scale, Multi-Country Context

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## **Abstract**

**Title:** The Role of the Project Management Office in Post-Merger Integration: A Qualitative Case Study of a Large-Scale, Multi-Country Context

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Post-merger integration (PMI) is a critical phase in Mergers and Acquisitions (M&A), requiring the alignment of processes, technologies, and people to realize intended synergies. This thesis examines key challenges inherent in PMI and analyzes the role of the Project Management Office (PMO) in managing integration complexity within large-scale, multi-country contexts.

Using a qualitative case study of Program Alpha, data were collected through semi-structured interviews with PMO members, Integration Management Office (IMO) representatives, and employees from both organizations, complemented by secondary data. The Gioia methodology was applied to identify higher-order themes.

The findings reveal four interrelated categories of PMI challenges: adaptive governance, technological integration complexity, organizational alignment, and communication-related impacts on employee experience. The results show that the PMO functioned as an adaptive governance mechanism, dynamically shifting between supportive and directive roles in response to evolving integration demands. This adaptability was operationalized through concrete governance tools, including standardized escalation mechanisms and clearly defined decision rights, which supported coordination and interdependency management across functions and countries.

This research contributes to PMI and PMO governance literature by conceptualizing the PMO as an adaptive, human-centered governance structure.

Practically, it provides guidance for PMO practitioners and integration managers in designing flexible governance frameworks for complex integrations.

Pedagogically, the case offers a robust empirical basis for analyzing PMI challenges and PMO governance in academic and professional settings.

**Keywords:** Post-merger integration; Project Management Office; Adaptive Governance; Technological Integration; Organizational Alignment; Employee Experience; Mergers and Acquisitions

## **Sumário**

**Título:** O Papel do Project Management Office na Integração Pós-Fusão: Um Estudo de Caso Qualitativo de uma Integração Multinacional de Grande Escala

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A integração pós-fusão (PMI) constitui uma fase crítica nos processos de fusões e aquisições (M&A), exigindo o alinhamento eficaz de processos, tecnologias e pessoas para a concretização das sinergias pretendidas. Esta dissertação analisa os desafios associados à PMI e examina o papel do Gabinete de Gestão de Projeto (PMO) na gestão da complexidade da integração em contextos multinacionais de grande escala.

Com base num estudo de caso qualitativo do Programa Alpha, os dados foram recolhidos através de entrevistas semiestruturadas a membros do PMO, representantes do Gabinete de Gestão da Integração (IMO) e colaboradores de ambas as organizações, complementadas por fontes secundárias. A metodologia Gioia foi aplicada para identificar temas de maior dimensão.

Os resultados identificam quatro categorias interrelacionadas de desafios da PMI: governação adaptativa, complexidade da integração tecnológica, alinhamento organizacional e impactos da comunicação na experiência dos colaboradores. O PMO atuou como um mecanismo de governação adaptativo, alternando entre funções de apoio e de direção em resposta às exigências da integração. Esta adaptabilidade foi operacionalizada através de mecanismos de escalonamento normalizados e direitos de decisão claramente definidos, apoiando a coordenação entre funções e países.

Esta investigação contribui para a literatura sobre PMI e governação de PMOs ao conceptualizar o PMO como uma estrutura de governação adaptativa e centrada nas pessoas. Em termos práticos, oferece orientações relevantes para profissionais de PMO e gestores de integração na conceção de enquadramentos de governação flexíveis.

**Palavras-chave:** Integração pós-fusão; Gabinetes de Gestão de Projeto; Governação Adaptativa; Integração Tecnológica; Alinhamento Organizacional; Experiência dos Colaboradores; Fusões e Aquisições

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## **List of Abbreviations**

ERP: Enterprise Resource Planning

GPO: Global Process Owners

HR: Human Resources

IMO: Integration Management Office

IS: Information Systems

IT: Information Technology

M&A: Mergers and Acquisitions

PDOM: Post-Delisting Operating Model

PMI: Post-Merger Integration

PMO: Project Management Office

RQ: Research Question

TOM: Country Target Operating Model

## **1. Introduction**

Post-Merger Integration (PMI) is widely regarded by scholars and practitioners as the most complex and critical phase of any Merger and Acquisition (M&A), often determining the overall success of the transaction. (Abravanel et al., 2024)

Managing this phase requires coordinated alignment of processes, systems, and people under a unified operating model, frequently across multiple regions and organizational structures. In many integration initiatives, Project Management Offices (PMO) are established to support planning, decision-making, and progress monitoring during the transition.

This dissertation examines the role of the PMO in a real post-merger integration context. The study focuses on the case of Company Ventis, following its acquisition by Company Zeta, where the integration initiative was internally referred to as Program Alpha. In this context, the PMO supported coordination across functional workstreams and country-level integration, overseeing progress towards a unified organization. By analyzing this case, the dissertation explores the challenges faced and the mechanisms used to address them in a large-scale, multi-country environment.

### **1.1 Research Gap and Motivation**

Although PMOs are commonly established to support PMI, academic research still offers limited insight into how these teams operate in complex integration environments.

Much of the existing literature focuses on formal structures rather than the day-to-day realities of coordinating across interdependent workstreams, navigating uncertainty, and responding to shifting integration demands. As a result, several important gaps remain.

First, a mechanism gap persists, despite PMI being widely characterized as a coordination and governance challenge, prior studies offer little empirical detail on the concrete tools, routines, decision flows, and escalation mechanisms PMOs employ to manage integration complexity in practice.

Second, communication gaps are evident, as research consistently highlights communication as essential for employee experience, alignment, and overall integration success, however it provides limited understanding of how PMOs structure communication flows, reduce ambiguity, and operationalize global and local communication routines during large-scale PMI.

Third, an adaptive governance gap emerges because traditional PMO classifications (supportive, controlling, directive) fail to capture the flexibility and role shifts required in

fast-paced integrations. Existing studies do not sufficiently explain how PMOs dynamically combine or transition between governance modes as integration challenges evolve.

Together, these gaps underscore the need for rich empirical analysis of PMO activity during PMI, particularly in complex, rapidly changing organizational contexts.

## **1.2 Research Questions**

Considering the gap identified above, this dissertation addresses the following Research Questions (RQ):

**RQ1:** What specific challenges do PMO teams face during PMI in large, multi-country integrations?

**RQ2:** Through which governance, process, and coordination mechanisms are these challenges addressed?

**RQ3:** What lessons and design principles can inform future PMO-led integrations?

## **1.3 Objectives of the Study**

The research has both practical and academic objectives.

From a practical perspective, the study intends to provide insights for organizations undertaking post-merger integration initiatives, particularly those relying on Project Management Offices to coordinate complex and interdependent workstreams.

From an academic perspective, the study is designed to contribute with empirical evidence on PMO activity during post-merger integration, with specific attention to governance mechanisms, coordination practices, and adaptive role configurations in large-scale, multi-country contexts.

## **1.4 Structure of the Dissertation**

The dissertation is structured into seven chapters. Chapter 1 is the introduction, referring to the main objectives and relevance of the study. Chapter 2 reviews the literature on M&A, PMI, and PMO governance. Chapter 3 presents the research methodology and analytical approach. Chapter 4 provides the context of Program Alpha. Chapter 5 presents the findings. Chapter 6 includes teaching notes, providing learning objectives, discussion questions, and guidance for academic use of the case in the classroom. Chapter 7 concludes with a summary of the key findings, the contribution of the study, and limitations.

## **2. Literature Review**

### **2.1 Mergers and Acquisitions (M&A)**

#### **2.1.1 M&A Process**

Beyond their legal or financial definition, M&As represent strategic decisions intended to create value through improved competitiveness, efficiency, and profitability (Calipha et al., 2010).

From a strategic perspective, M&A activities function as vehicles for translating corporate objectives into actionable initiatives that pursue outcomes such as market expansion, access to new technologies, diversification, operational efficiency, or strengthened competitive positioning. Nevertheless, as noted in Noghrehkar (2023), financial indicators alone are insufficient to evaluate success since organizational dynamics during the integration phase strongly influence the realization of these objectives.

For many firms, engaging in mergers and acquisitions constitutes a primary route to achieving organizational growth (Bauer & Matzler, 2014). However, empirical evidence consistently shows that the strategic and operational objectives motivating these transactions are often only partially realized (Cartwright & Schoenberg, 2006). This gap between expectations and outcomes has led scholars to adopt a process-oriented perspective, arguing that M&A should be understood not as an isolated event but as a multi-stage sequence whose effectiveness depends on the quality of execution throughout the entire process (Jemison & Sitkin, 1986).

#### **2.1.2 Post-Merger Integration as a Critical Phase**

The M&A process is commonly described as a sequence of stages that unfold before, during, and after the deal. Drawing on the process perspective proposed by Jemison & Sitkin (1986), Steigenberger (2017) conceptualizes M&As as multi-stage processes beginning with strategic evaluation and screening, progressing through negotiation and due diligence, and culminating in post-merger integration. Within this sequence, PMI is highlighted as the central determinant of ultimate M&A outcomes.

Consistent with this view, Marks & Mirvis (2001) propose that M&As unfold in three phases, precombination, combination, and postcombination, each characterized by specific strategic and psychological challenges. (Marks & Mirvis, 2010, 2015) further distinguishes between “typical” and “successful” integration trajectories, emphasizing that organizations that approach integration as a value-creation process, rather than as a reactive exercise, achieve superior outcomes.

Phase	Typical Emphasis	Successful Emphasis
Pre combination	Financial	Strategic
Combination	Political	Transition Planning
Post combination	Damage Control	Value Creation

*Table 1- Combination Phases (Source: Marks & Mirvis, 2010, 2015)*

This perspective reinforces the view that, although financial expectations may motivate M&A decisions, the realization of value depends largely on the effectiveness of post-merger integration throughout these stages rather than on the transaction itself.

## **2.2 Post-Merger Integration Challenges**

### **2.2.1 Structural and Governance Challenges**

Structural and organizational challenges are widely recognized as a core source of post-merger integration risk. PMI can be understood as the process that unfolds after deal closure, in which the newly combined organization is reconfigured by investing or divesting resources, product lines, or entire business units in order to realize expected combination benefits (Bodner & Capron, 2018). However, empirical evidence shows that achieving these benefits remains difficult in practice. Managers in acquiring firms frequently report that only about half of their deals meet initial expectations, while employees in acquired organizations often experience increased culture-related stress and elevated turnover rates in the years following acquisition Krug & Aguilera (2005) cited in Cartwright & Schoenberg (2006).

A substantial body of research has examined the structural dimensions of post-merger integration, Larsson & Finkelstein (1999) define organizational integration as the degree of interaction and coordination between merging firms through restructuring, material flows, and deliberate integration mechanisms. Complementing this view, Cording et al. (2008) emphasize that integration decisions shape post-merger performance by guiding internal reorganization processes, rather than the simple extent of formal structural integration.

Lundqvist (2011) demonstrates that early indicators of merger success can deteriorate in the absence of sustained post-merger integration structures. While administrators initially reported openness to change and satisfaction with communication, the post-merger phase was characterized by lower productivity, fragmented workdays, difficulties adapting to new routines and information systems, and reduced perceptions of involvement. These findings indicate that effective pre-merger communication alone does not ensure successful integration, highlighting the need for continuous information, involvement, and support throughout the post-merger process.

### 2.2.2 Technological Integration

Technological Integration is recognized as a crucial step in PMI. However, as noted by Wijnhoven et al. (2006), the topic remains underexplored in the literature. Following the merger agreement, Information Technology (IT) departments are often expected to consolidate technological infrastructures as quickly as possible to minimize disruptions to ongoing operations. This expectation is challenging because prior research shows that poor post-merger performance is often linked to organizations' failure to adequately consider the Information Systems (IS) and IT implications of mergers (McKiernan & Merali, 1995).

Henningson et al. (2018) reinforce the centrality of technological integration by demonstrating that a substantial share of merger value depends on the successful alignment of information systems. Their findings show that decisions regarding systems integration are closely interrelated with broader organizational factors and have a significant impact on overall PMI performance. When technological integration is mismanaged, anticipated synergies often fail to materialize.

Wijnhoven et al. (2006) identify four primary IS integration strategies, each presenting distinct technical and organizational implications, as summarized in Table 1.

Renewal	The legacy systems are discarded, and a new system is built.
Takeover	One firm's system becomes the dominant platform.
Standardization	Combines the best components from both firms into a harmonized architecture.
Co-existence	Systems run in parallel with minimal integration.

Table 2 - Four primary IS integration strategies (Source: Based on Wijnhoven et al. (2006), adapted by the author)

These strategic choices shape not only system compatibility and data harmonization requirements but also influence user adaptation, training needs, and the temporary productivity declines that typically accompany technological transition. Additionally, Wijnhoven et al. (2006) found in their case study that previous collaboration within IT user associations appears to strongly support standardization efforts, whereas such collaboration does not benefit renewal.

### **2.2.3 Cultural and Organizational Challenges**

Cultural and organizational dynamics also represent a central dimension of PMI complexity. Research has also addressed the role of complementarity and similarity in determining the extent of integration. Bauer & Matzler (2014) show that strategic complementarity between merging firms leads to a higher degree of integration, as closer coordination is required to realize synergies. Their findings further indicate that cultural fit positively influences M&A success, while being associated with lower speed and degree of integration, suggesting that strong cultural compatibility may mitigate coordination demands during the integration process. Similarly, Sarala & Vaara (2010) conceptualize post-merger integration in terms of cultural integration processes, emphasizing organizational cultural convergence and crossvergence as key mechanisms. Their results demonstrate that such cultural integration processes significantly facilitate knowledge transfer between the acquiring and acquired firms.

The study conducted by Lundqvist (2011) provides further evidence that cultural misalignment can undermine integration. As employees struggled to reconcile distinct organizational cultures and adapt to new routines, perceptions of involvement and clarity declined, and productivity suffered. These findings align with broader PMI research emphasizing that cultural cohesion is not merely a desirable outcome but a critical determinant of integration success.

### **2.2.4 Communication and Employee Perception**

Communication and employee perceptions are recognized in the academic literature as critical determinants of post-merger integration success. Research consistently shows that financial and strategic objectives alone are insufficient to ensure positive integration outcomes. Instead, the realization of planned synergies depends on how integration is communicated, managed, and experienced by organizational members (Parveen et al., 2022).

From an employee perspective, Parveen et al. (2022) provide empirical evidence that communication strategy, operational management, and resource management are statistically significant predictors of post-merger integration success. Their findings indicate that clear and consistent communication, together with effective managerial practices, plays a central role in shaping employee responses during the integration process, thereby influencing integration outcomes. These results highlight the importance of systematically addressing employee concerns, uncertainty, and involvement throughout post-merger integration.

Complementing academic research, practitioner-oriented contributions further underscore the role of leadership communication and employee engagement during mergers and acquisitions. Insights from Milosevic et al. (2025) emphasize that transparent communication, consistent

leadership behavior, and sustained attention to employee experience are critical for building trust and fostering a cohesive organizational culture in the post-merger context. Similarly, strategy-oriented perspectives argue that while synergy logic and structural alignment are necessary conditions for successful integration, their realization ultimately depends on how employees interpret and respond to integration initiatives (Noghrehkar, 2023).

Taken together, these perspectives suggest that post-merger integration outcomes emerge from the interaction between strategic intent, managerial execution, and employee perceptions. Communication therefore functions not merely as a supporting activity, but as a central mechanism through which organizational members make sense of change, engage with new organizational arrangements, and ultimately contribute to the success or failure of post-merger integration.

## **2.3 Project Management Offices**

### **2.3.1 Conceptual Foundations of PMOs**

A Project Management Office is an organizational unit that establishes consistent project governance practices and promotes the effective use of resources, methods, tools, and techniques. Its role can vary from simply offering support and guidance in project management to taking full responsibility for managing one or several projects directly (Project Management Institute (PMI), 2021).

- **Supportive PMOs** – These offices act mainly as advisors, offering guidance, templates, best practices, training, and access to knowledge gathered from past projects. They serve as a knowledge hub, but their level of control over projects is minimal.
- **Controlling PMOs** – These provide support but also enforce compliance with standards. This may include requiring the use of specific methodologies, templates, tools, or governance processes. Their level of control is moderate.
- **Directive PMOs** – These assume direct responsibility for managing projects. They exercise a high level of control by taking charge of project execution themselves.

According to Hobbs (2007), the five main roles of PMO in organizations are:

1. Monitor and control project performance
2. Development of project management methods
3. Multi-Project Management
4. Strategic management
5. Organizational learning

PMOs enhance managerial visibility by monitoring project performance, enforcing governance structures, and standardizing project management methods. Many PMOs also coordinate multiple projects or portfolios, managing interdependencies and aligning initiatives with organizational strategy. More recently, PMOs have expanded into strategic and learning-oriented roles by supporting executive decision-making, benefits realization, and the preservation of organizational knowledge, thereby contributing to continuous improvement and organizational maturity (Hobbs, 2007).

Aubry (2015) observes that recent research has increasingly examined PMO functions in terms of their differential effects on project and organizational performance. Drawing on the study by Unger et al. (2012), which analyzed 278 project portfolios, Aubry highlights that directive and controlling PMO roles are associated with improved portfolio-level performance, whereas supportive PMO roles are more closely linked to success at the individual project level. Based on these findings, Aubry (2015) concludes that strengthening the supportive role of the PMO is a strong indicator of enhanced project outcomes, improved business performance, and higher levels of project management maturity. At the same time, the study cautions that an overly supportive PMO may have adverse effects in challenging external conditions.

### **2.3.2 PMO in Post-Merger Integrations**

Post-merger integration research has increasingly highlighted the need for structured coordination mechanisms to manage the complexity of combining organizations. Early integration planning often relied on independent “clean teams” of legally authorized external experts or on parallel planning groups coordinated through consultant-led “shuttle diplomacy,” both intended to accelerate readiness, reduce uncertainty, and support rapid decision-making (Marks & Mirvis, 2015). Studies focusing on interaction and communication during PMI show that increased collaboration between merging firms enhances coordination and integration outcomes (Graebner et al., 2017). Within this context, the PMO has become a central coordinating mechanism, offering visibility, oversight, and operational discipline in a dynamic

integration environment. As such, the PMO serves as both a hub for cross-organizational alignment and an adaptive structure that supports coordination, alignment, and disciplined execution throughout the integration process (Aubry, 2015).

Cultural integration, one of the most sensitive dimensions of PMI, may also be indirectly supported by the PMO through the structuring of communication, coordination, and change related activities. In this facilitating role, the PMO can help structure dialogue, workshops, and change management initiatives that sustain employee engagement during the transition. Beyond cultural concerns, the PMO may also coordinate key integration activities such as talent management, IT consolidation, and process harmonization, while maintaining flexibility in execution to respond to evolving organizational and market conditions (Aubry, 2015).

Complementing this perspective, Maire & Collerette (2011) highlight the importance of the Integration Manager as a governance actor who drives coordination, communication, problem-solving, and momentum across merging entities, particularly critical in cross-border contexts where cultural and organizational asymmetries intensify coordination challenges. Recent work further argues that embedding integration within a PMO-led governance structure enables organizations to address uncertainty systematically, align teams, and optimize value creation, ultimately supporting long-term performance and competitive advantage (Troyer, 2025).

### **2.3.3 Challenges in Implementing and Operating PMOs**

Implementing a PMO is inherently challenging, although research exploring these difficulties remains limited. Successful PMO adoption depends on the organization's ability to navigate structural, cultural, and strategic barriers (Singh et al., 2009).

In a study of over four hundred project managers, Singh et al. (2009) identified recurring obstacles such as limited executive support, unclear PMO goals, absence of formal governance models, poorly defined reporting structures, and a lack of standardized processes or knowledge management practices. Cultural resistance and rigid organizational norms further complicate PMO implementation, as employees may perceive new governance requirements as bureaucratic or intrusive.

To address these challenges, the literature recommends an incremental approach. A "PMO-light" implementation allows organizations to start with a small scope, demonstrate value, and scale the PMO gradually as acceptance grows. This process should be supported by clear communication, flexible governance mechanisms, and performance metrics to demonstrate

progress. Aligning PMO practices to organizational maturity is essential to avoid unnecessary complexity at early stages.

Leadership and culture also play a decisive role. A “PMO champion” is often required to communicate benefits, build trust, and mitigate resistance. Experienced leadership helps manage both the technical and political aspects of PMO adoption. Positioning the PMO close to senior management increases its authority and strategic alignment, enhancing its ability to influence organization-wide change (Magnúsdóttir, 2012; Marks & Mirvis, 2001).

In summary, PMO implementation is a multifaceted transformation shaped by structural clarity, cultural readiness, leadership support, and incremental development. Overcoming these challenges requires alignment with organizational strategy, a phased rollout, clear communication, and visible sponsorship from senior leaders.

### **3. Methodology**

#### **3.1 Research Design**

As introduced earlier, the research is grounded on a real post-merger integration. The previous literature review provides only partial explanations of how PMOs operate within complex integration environments, but it offers limited insights into the actual mechanisms through which PMOs coordinate activities, manage uncertainty, and adapt governance practices during integration. There is a clear need for research that examines how PMOs apply governance, coordination, and communication mechanisms during large-scale PMI.

To address these gaps, the study employs a single-case study design. A case study approach is particularly effective for answering questions within real-life contexts, providing a holistic understanding of the complex dynamics involved in mergers and acquisitions (Yin, 2014).

Given the exploratory nature of the research, a qualitative approach was considered the most appropriate, as it allows for an in-depth examination of organizational processes and individual perceptions. Following Creswell (2007), qualitative research is grounded in interpretive frameworks that shape how social phenomena are understood. Accordingly, the study adopts a constructivist–interpretivist paradigm, which assumes that reality is socially constructed and accessed through the meanings individuals attribute to their experiences. This paradigm supports a primarily inductive analytical process while remaining open to the integration of predefined concepts, emphasizing the identification of patterns and themes emerging from participants’ perspectives.

### **3.2 Data Collection**

In this study, data were collected through eleven semi-structured interviews with members of Program Alpha, specifically PMOs and IMOs with different seniority levels, as well as employees of both companies. All interviews were conducted via Microsoft Teams and had a duration between 20 and 40 minutes.

Semi-structured interviews were chosen as they ensure flexibility of discourse while maintaining a defined structure and key thematic focus. Thanks to their flexibility and relative spontaneity, these interviews can both confirm or question research's prior understanding and uncover entirely new insights, themes, or aspects of existing knowledge (Karatsareas, 2022).

Participants were selected to capture a broad range of perspectives, including those responsible for integrating and those experiencing integration. This approach corresponds to purposive sampling, as interviewees were intentionally selected based on their relevance and experience in relation to the research question. Purposive sampling is widely used in qualitative research to generate rich, context-specific insights by focusing on information-rich cases aligned with the study's objectives (Tajik et al., 2024).

The first phase of interviews involved PMOs and IMOs with varying levels of seniority who participate directly in Program Alpha and hold responsibilities across multiple areas. An initial test interview was conducted with a PMO who had been part of the Program since its initial stage, providing an overview of the initiative as well as the main challenges encountered. Subsequently, four additional PMOs and two IMOs were interviewed. They shared their perspectives on the principal challenges, the ways they managed them, and the best practices they identified for future multi-country integration programs.

The second phase of interviews was conducted with employees from both companies who were involved in the integration process. The purpose of this stage was to understand their perspective on the integration process led by the PMO team and to identify the main pain points experienced by individuals undergoing integration. This complementary perspective enabled the capture of not only managerial and program-level challenges but also the operational and human experiences of individuals directly affected by the integration.

### **3.3 Data Analysis**

For this study, the Gioia et al. (2013) approach was chosen to analyze the data collected from the interviews, complemented by the thematic analysis framework proposed by Braun & Clarke (2006) to guide the systematic coding stage. The interview data constitute the primary dataset.

The Gioia method offers a rigorous structure for data analysis by presetting both first-order analysis, reflecting interviewees' perspectives, and second-order analysis incorporating researcher-centered concepts. This systematic layering provides a solid foundation to support the empirical grounding of the findings (Gioia et al., 2013).

The choice of Gioia methodology was particularly relevant given the diversity of interviewees involved in the integration process. This diversity created a need to progressively narrow the topics emerging from the interviews to identify the core themes. Another advantage of Gioia method is the transparency it provides throughout the analytical process, from data collection to analysis and theory development.

The use of thematic analysis further supports this approach, as it allows the data to be coded without fitting into pre-existing coding frameworks, imposing the researcher's analytic preconceptions. In this sense, thematic analysis remains data driven. Following Braun & Clarke (2006) steps, the process began with familiarization with the data, followed by the identification of meaningful features and the assignment of codes to relevant segments. Codes were then organized into potential themes and supporting data extracts were collated. Theme refinement, definition, and the writing of the analysis were undertaken in complementarity with the Gioia method. Thematic coding generated the initial set of descriptive codes, which were then organized following Gioia's structure of first-order concepts, second-order themes, and aggregate dimensions.

In addition to primary data, secondary data was collected through materials made available by the organization to contextualize the structure and objectives of the integration program, the role of the PMO, and the processes implemented to address emerging challenges.

Access to both primary and secondary data enabled the triangulation of different information sources by examining evidence across them and constructing a coherent justification for the emerging themes. When themes are supported by converging data from multiple sources or from diverse participant perspectives, this enhances the validity of the study (Creswell, 2007).

### **3.4 Ethical Considerations**

Data collection followed a clear and consistent procedure, with all interviewees being briefed on the study's purpose and themes before participation.

To ensure confidentiality, all interviews were conducted on a one-to-one basis. Neither the company nor the interviewees are identified at any stage of this research. All data were anonymized and securely stored, accessible only to the researcher. Participation was voluntary, and interviewees are referred to solely by their role within the company, recognizing that their position may influence their perspective on the integration process. These measures ensure both the protection of sensitive information and the credibility of the research.

## **4. Case Study**

This chapter introduces the empirical context of the study by presenting the organizations involved in the merger, the strategic rationale behind the acquisition, and the post-merger integration program that constitutes the core case of this thesis. It provides an overview of Company Zeta and Company Ventis, followed by a detailed description of Program Alpha, including its scope, governance structure, and project management approach. The chapter establishes the organizational and operational background necessary for the subsequent analysis.

### **4.1 Company Zeta**

Company Zeta was formally established on 1 April 2020 through the carve-out of Department X from its parent organization, hereafter referred to as the Parent Company.

Headquartered in Germany, Company Zeta is a Europe-based multinational enterprise that has rapidly developed into a large-scale global player. At the time of the integration, the company employed more than 100,000 professionals and operated in over 90 countries worldwide.

The company focuses on renewable and energy-related technologies and has positioned itself as a significant actor in the global energy transition. Its portfolio covers multiple segments of the renewable energy value chain and reflects a strategic emphasis on sustainability, innovation, and long-term growth. Within this strategic context, growth through acquisitions has played an important role, with the acquisition of Company Ventis representing a major step in strengthening Zeta's renewable energy capabilities and expanding its international footprint.

## 4.2 Company Ventis

Company Ventis was established in 2017 following the merger of an external company with Department Y of the Parent Company.

Headquartered in Spain, Ventis operates in more than 80 countries worldwide and employs approximately 32,000 professionals.

The company specializes in renewable energy technologies, with a particular focus on the development, installation, and maintenance of turbine solutions.

Ventis' strong engineering expertise, technical know-how, and innovation-driven orientation represent complementary capabilities to those of Company Zeta.

These strengths were a central factor in the acquisition decision, as they directly supported Zeta's ambition to accelerate technological development and enhance its competitive positioning in global renewable energy markets.

Figure 1 illustrates the structural relationship between the Parent Company, Company Zeta, and Company Ventis, including Program Alpha, the integration program established to coordinate integration activities. The figure provides contextual support for sections 4.1 and 4.2, while Program Alpha is analyzed in detail in section 4.4.

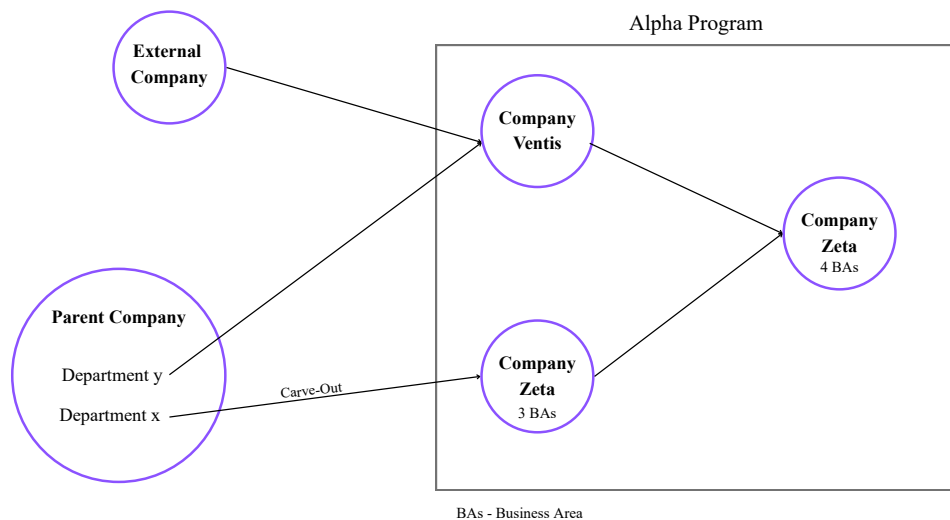


Figure 1- Overview of the Organizational relationships and integration framework (Source: Developed by the author)

### 4.3 Strategic Rationale for the Acquisition

The acquisition was motivated by several strategic objectives, including expanding Zeta's renewable energy capabilities, strengthening technological complementarities, improving competitive positioning, and accelerating innovation. The merger was also aligned with global energy transition trends and supported Zeta's long-term ambitions in sustainable energy markets. Company Zeta acquired Company Ventis in May 2022, and completed full ownership in 2023 with 100% of the shares.

A central strategic goal of the merger was cost optimization, with an overall target of approximately €500 million<sup>1</sup> in savings to be realized within five years of integration. Achieving such savings required significant coordination efforts across departments and regions, careful planning of resource allocation, and harmonization of overlapping functions, processes, tools and systems.

### 4.4 Overview of Program Alpha

Following the acquisition, Company Zeta launched Program Alpha, a structured post-merger integration initiative. The program was responsible for coordinating integration activities across the two organizations, with a specific focus on aligning functional processes, ensuring business continuity, and setting the foundations for a unified organization. Program Alpha was managed through a central PMO and IMO, working collaboratively with regional and functional teams.

Initially, in March 2022, Program Alpha operated with only four PMO members. However, it quickly became evident that this capacity was insufficient for the scale and complexity of the integration. As a result, the team expanded significantly and now consists of fourteen PMOs.

A timeline summarizing key milestones related to the establishment of Company Zeta, the acquisition of Company Ventis, and the launch of Program Alpha is provided in **Appendix E**.

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<sup>1</sup> This value is completely illustrative, used here only to indicate the magnitude and ambition of the initiative.

#### 4.5 Integration Scope and Phases

At the start of the initiative, Zeta and Ventis still operated as separate legal entities, which meant that several duplicated roles, parallel systems, and independent corporate functions continued to exist. Program Alpha guided the transition from separate operations to a unified organizational model. The integration covered 44 countries, 16 functions and was carried out through two main workstreams: Functional Integration and Regional Country Integration.

Functional Integration focused on consolidating and aligning central functions. As a result of the scale of the integration, activities were organized into two implementation waves, internally referred to as Bus 1 and Bus 2.

- Bus 1 included Taxes, Treasury & Corporate Finance, Accounting & Controlling, and partially Human Resources and was launched on January 1, 2024.
- Bus 2 included Assurance, Communications, Cybersecurity, Human Resources, IT, Legal & Compliance, Procurement & Logistics, and other specialized functions and was launched on June 1, 2024.

Regional Country Integration took place following a phased methodology. Each country followed a structured process including evaluation, set-up workshops, development of a country target operating model, local implementation, and post go-live support. The objective was to gradually migrate local operations into the unified organization while maintaining business continuity and adapting integration activities to country-specific needs.

The regional component of the integration was organized across five global zones: Latin America & Spain, Europe & North America, Europe & Germany, Middle East & Africa, and Asia Pacific & China. Each zone had a Country Officer and an Integration Management Officer responsible for supporting execution and ensuring coordination between central and local teams.

To support coordination, Program Alpha established a structured calendar of working sessions and progress reviews involving central, functional, and country representatives. Shared working tools and collaboration platforms were used to document progress and ensure transparency around key activities, deliverables, and timelines.

A visual overview of the geographical scope of the regional integration and the countries involved is provided in **Appendix F**.

## 4.6 Governance Model and Organizational Structure

To oversee the integration effort, Program Alpha established a structured governance model. At the highest level, a Steering Committee provided strategic oversight and decision-making authority. Operational coordination was led by the Integration Program Lead, who ensured alignment across functional and regional streams.

Core teams included the PMO, IMO, Communications, Change Management, and Commercial teams responsible for budget and synergy tracking. These teams worked closely with functional and regional streams, which were responsible for executing integration activities within their respective domains and geographical areas.

In total, approximately 1,000 employees were involved in the integration effort across functions and countries. A multi-layered governance hierarchy was implemented to ensure transparency, accountability, and effective linkage between strategic decision-making and operational execution. The governance structure of Program Alpha is illustrated in *Figure 2*.

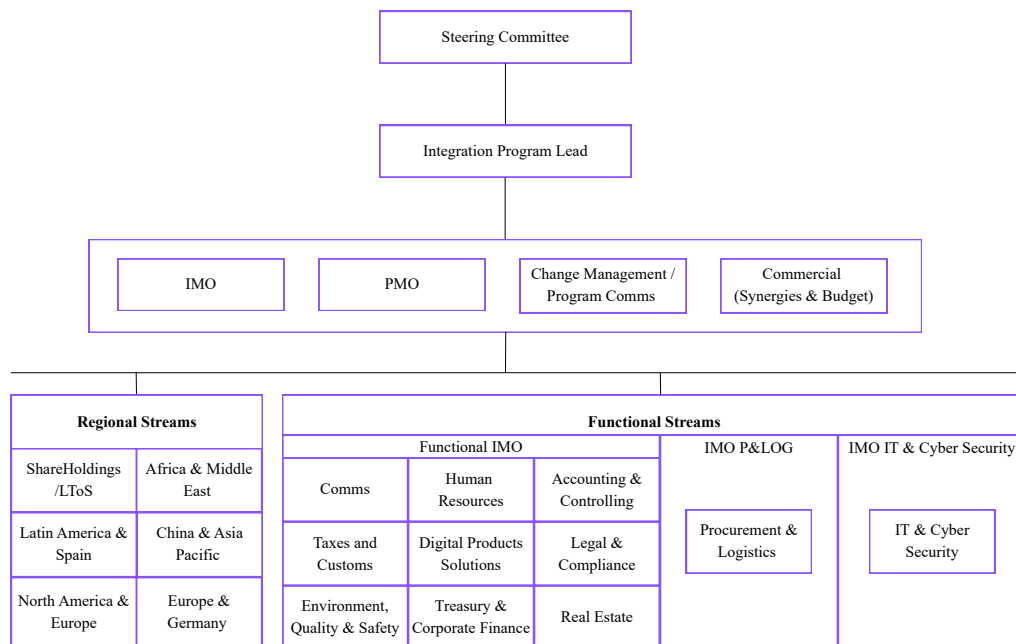


Figure 2 - Governance Structure of Program Alpha (Source: Secondary Data, adapted by the author)

#### **4.7 Project Management and Operational Coordination**

Program Alpha followed a project management approach based on continuous planning and iterative follow-up cycles. Regular review meetings enabled functional and regional representatives to monitor deliverables, identify upcoming milestones, and manage dependencies across workstreams. Shared documentation repositories and progress dashboards supported transparency and visibility across the program and contributed to effective coordination of integration activities. An example of the task status tracking used within Program Alpha is provided in **Appendix G**.

Operational coordination was further supported by a structured set of governance rituals, including leadership meetings, sprint reviews, deep-dive sessions, and cross-functional alignment forums involving both regional and functional stakeholders. These recurring meetings ensured consistent progress monitoring and facilitated timely alignment across the organization. The sprint calendar and key governance rituals applied during the period under analysis are illustrated in **Appendix H**.

Given the scale and complexity of the integration, a formal escalation process was established to address risks, delays, and decision points requiring management attention. Issues identified within functional or regional workstream teams could be escalated to Program Management and, where necessary, to the Steering Committee for resolution. This structured escalation framework supported efficient decision-making while maintaining momentum across the program. The escalation and decision-making process is summarized in **Appendix I**.

As a result of the multi-country and multi-functional scope of the initiative, Program Alpha combined functional consolidation with a phased regional rollout, enabling both global standardization and local adaptation. Successful execution required close cooperation between headquarters, functional departments, and local country representatives, all working toward the common objective of ensuring business continuity during the transition to a unified organizational model.

## 5. Findings

This chapter presents the empirical findings of the study. The analysis follows an inductive thematic approach based on Braun & Clarke (2006), through which second-order themes were identified and subsequently organized into four aggregate dimensions using the Gioia et al. (2013) methodology.

The findings address RQ1 and RQ2:

**RQ1:** What specific challenges do PMO teams face during PMI in large, multi-country integrations?

**RQ2:** Through which governance, process, and coordination mechanisms are these challenges addressed?

### 5.1 Gioia Data Structure

Table 3 presents the data structure developed following Gioia et al. (2013).

First-Order Concepts (Direct Quotes)	Second-Order Themes	Aggregate Dimensions
<p>“We had to build the integration methodology from scratch”</p> <p>“There was no structured or systematic documentation”</p> <p>“At the beginning, it was chaos and storming”</p>	Lack of initial governance structure	<b>Adaptive PMO Governance</b>
<p>“The approval process involved four sequential steps, each requiring signatures from six to seven stakeholders.”</p> <p>“If a document was rejected at Step 3, the process restarted from Step 1 ”</p> <p>“Each function governed its own processes”</p>	Escalation and decision-making practices	
<p>“Issues were escalated to the Steering Committee”</p>	Introduction of standardized PMO practices	

<p>“I escalated issues directly to Global Process Owners (GPO), who quickly resolved them.”</p> <p>“Use a clear, standardized set of templates and maintain methodological consistency”</p> <p>“The work was structured in sprints”</p>		
<p>“Merging two Microsoft tenants with over 100,000 users”</p> <p>“Unprecedented process even for Microsoft”</p> <p>“Migration occurred in 15 waves”</p> <p>“The need to use two Microsoft accounts created additional complications.”</p> <p>“Users faced missing access rights, login problems, and system incompatibilities.”</p> <p>“Zscaler configuration problems”</p>	<p>Large-scale IT integration challenges</p>	<p><b>Technological Integration</b></p>
<p>“We realized that countries did not fully understand how the new ERP setup or future processes would function.”</p> <p>”Ensuring that all business processes, such as mandates, purchase orders, accounting procedures, and access rights, functioned correctly in the ERP system.”</p> <p>“ERP rollout, especially delays in Latin America, became the most significant technical challenge.”</p>	<p>ERP (Enterprise Resource Planning) dependencies across functions and countries</p>	

<p>“Global teams had a high-level perspective, while local teams focused on operational implementation”</p> <p>“Local teams were initially hesitant to contact global leads”</p> <p>“Some countries were well informed, while others had not heard of the integration even after two years”</p> <p>“Involved joint learning sessions between local and global teams, enabling them to develop country-specific task lists”</p>	<p>Global and local coordination challenges</p>	<p><b>Organizational Alignment</b></p>
<p>“Ventis operated in a more flexible, informal, and agile manner, whereas Zeta had a more structured”</p> <p>“Differences were rooted in structural rather than national”</p> <p>“This was an acquisition, not a merger”</p>	<p>Organizational and cultural differences</p>	
<p>“Two people performed the same role”</p> <p>“Responsibilities were unclear, and roles were fragmented”</p> <p>“Creating duplicated processes and confusion regarding ownership”</p>	<p>Unclear roles and ownership</p>	
<p>“Communication was unclear, poorly structured, and often came from unknown senders”</p> <p>“Emails were long, confusing, and lacked clear instructions.”</p> <p>“Communication was inconsistent”</p>	<p>Unclear and inconsistent communication</p>	<p><b>Communication and Employee Experience</b></p>

<p>“My migration was postponed several times”</p> <p>“I often felt lost during the process”</p>	<p>Employee uncertainty during migration</p>	
<p>“Support was available, though identifying the correct contact was sometimes difficult.”</p> <p>“I begin with a management kick-off, ideally on-site, to build empathy.”</p> <p>“Weekly meetings with the project manager, and bi-weekly meetings with the broader team.”</p>	<p>Impact of communication on employee experience</p>	

Table 3 - Gioia Data Structure (Source: Developed by the author)

## 5.2 Adaptive PMO Governance

A central empirical finding concerns the absence of an initial governance structure. Interviewees consistently described the early stages of integration as fragmented and unstructured. As one PMO noted, *“Although people had the experience, there was no structured or systematic documentation”* (I2). Another interviewee described the early phase as a *“chaos or storming phase”*, during which teams lacked clarity regarding stakeholder roles, deliverables and methodologies (I4).

The absence of formal processes also affected decision-making. Approval workflows involved *“four sequential steps, each requiring signatures from 6–7 stakeholders... If a document was rejected at Step 3, the process restarted from Step 1”* (I1). Each functional area governed its approvals differently, with cross-functional issues escalated directly to the Steering Committee (I6).

To address these challenges, the PMO introduced several governance tools. The Post-Delisting Operating Model (PDOM) was frequently mentioned as a turning point, as it clarified responsibilities, escalation paths, reporting lines, and temporary ownership in areas where roles overlapped. Standardized templates and sprint-based tracking were introduced to ensure consistent methodologies. As a PMO explained, *“(…) created a sprint-based approach with monthly deliverables and tracking lists to monitor progress across all 16 functions simultaneously”* (I2).

Escalation mechanisms also supported decision-making. When ownership was unclear, issues were raised directly to Global Process Owners, who “*quickly resolved them*”, *clarified the roles, and assigned the accountable person so we could move forward*” (I7).

These findings highlight governance ambiguity as a significant challenge during the early integration stage and show how procedural tools, documentation, and escalation routines were progressively introduced to stabilize execution.

### **5.3 Technological Integration**

Technological integration emerged as one of the most complex dimensions of the PMI. Interviewees described unprecedented technical challenges, including the consolidation of two global Microsoft tenants comprising over 100,000 users. One PMO stated that this was “*an unprecedented process even for Microsoft*” (I2).

Early stages were marked by access limitations and system fragmentation. Some Ventis employees lacked email addresses, while others could not access SharePoint content (I11). Many employees experienced reduced functionality, and reporting technical issues such as duplicated accounts, Zscaler configuration problems and inconsistent permissions.

ERP dependencies represented another major finding. Several interviewees emphasized that functional processes ultimately depended on successful ERP consolidation. As described by one PMO, “*During planning, we realized that countries did not fully understand how the new ERP setup or future processes would function.*” (I4). Delays in Latin America’s ERP rollout had cascading impacts on European timelines.

To manage these constraints, the PMO developed Day-1 Readiness Workshops, improved end-user support, and coordinated IT and functional workstreams more closely. The user migration process was executed in 15 weekly waves, allowing teams to progressively resolve issues and stabilize system access.

Overall, the findings indicate that technological integration was not only technically demanding but also shaped employees’ daily work, readiness, and sense of belonging.

## 5.4 Organizational Alignment

Organizational alignment challenges emerged as a significant theme, reflecting underlying structural, cultural, and procedural differences between the merging firms. Interviewees consistently highlighted misalignment between global and local teams, particularly in terms of communication and role clarity. They also noted that communication alignment was frequently ambiguous, with global and local stakeholders not always operating within a shared interpretative framework or ‘speaking the same language’.

Furthermore, the findings indicate a divergence in focus between organizational levels: global teams were primarily concerned with strategic oversight and high-level governance, whereas local teams concentrated on operational execution and implementation. Within this context, the PMO played a critical mediating role by facilitating coordination, translation, and alignment between global strategic objectives and local execution realities. As such, the PMO functioned as an essential integrative mechanism bridging strategic intent and operational delivery during the integration process.

A key challenge concerned the creation of local task lists for functional integration. Initially, global functions provided standardized instructions, but these proved incomplete or irrelevant in several contexts. Interviewees mentioned that global teams had limited insight into the day-to-day activities and operational responsibilities of local teams, which contributed to gaps in the initial task lists. To address this misalignment, PMOs facilitated joint sessions where global and local teams co-developed customized integration plans.

Cultural differences were also observed, although interviewees clarified that they were rooted in organizational structure rather than nationality. Zeta was described as “*more structured and formal*”, whereas Ventis was “*more flexible*” (I9). Another participant noted that the integration dynamic was shaped by the fact that “*this was an acquisition, not a merger*” (I2), which influenced expectations and coordination styles.

Unclear ownership further complicated alignment. Interviewees reported cases where “*two people were performing the same role*” (I2), creating confusion and duplicated execution. The PDOM was again cited as the mechanism that clarified temporary responsibilities and improved alignment until the final Target Operating Model (TOM) was established.

Over time, alignment improved through structured communication routines, recurring review meetings, and consistent involvement from the PMO.

### **5.5 Communication and Employee Experience**

Communication challenges represented a major challenge, particularly for employees undergoing migration. Many described communication as unclear, inconsistent or overly complex. According to I8, “*Communication was unclear (...) Emails were long, confusing, and lacked clear instructions.*” Support channels were also perceived as fragmented, with employees feeling lost during the process (I8).

Migration delays significantly affected the employee experience. Participants reported multiple rescheduling with little explanation, creating frustration and uncertainty. One shared that their migration was “*postponed four times without explanation*” (I8), while others felt lost because access issues persisted for days or weeks.

Technical disruptions amplified this uncertainty. Users struggled to understand expectations, resulting in numerous support requests. Some employees described having to work temporarily in two systems, which increased confusion and workload.

To mitigate these challenges, the PMO introduced direct communication channels, on-site visits, and structured meetings. As noted in I6, “*(...) ideally on-site, to build empathy,*” particularly for countries undergoing onboarding. Bi-weekly alignment meetings and clearer templates gradually improved communication quality and reduced ambiguity.

Despite improvements, the findings show that communication effectiveness and migration readiness had a strong influence on employees’ psychological experience, contributing to frustration when visibility or support were insufficient.

The findings presented in this chapter reveal four major categories of challenges encountered during Program Alpha: governance, technological integration, organizational alignment, and employee experience. While this chapter focuses on empirical observations, the following chapter provides a detailed discussion of what these findings mean for theory and practice and derives lessons for future PMO-led integrations.

## **6. Teaching Notes**

This chapter translates the empirical findings into teaching-oriented insights, combining theoretical interpretation with managerial and pedagogical implications.

### **6.1 Case Summary**

Program Alpha represents a large, multi-country post-merger integration between two multinational renewable energy companies. The PMO played a central role in coordinating governance, technological integration, organizational alignment, and employee experience. The case illustrates the complexity of global integrations, where technological readiness, cross-country dependencies, communication effectiveness, and role clarity strongly influence outcomes.

### **6.2 Discussion of Findings**

#### **6.2.1 Adaptive PMO Governance**

The case of Program Alpha illustrates that PMOs operating in post-merger integration contexts should not depend on fixed governance models. Instead, PMOs in PMI must operate as adaptive governance systems, adjusting their roles dynamically to manage evolving complexity.

In the absence of an initial governance framework, the integration experienced fragmented decision-making, unclear ownership, and inconsistent approval mechanisms, which only stabilized as the PMO progressively introduced structure through operating models, escalation paths, and standardized routines.

As Aubry (2015) notes, PMO functions should be shaped by the required level of influence and organizational performance needs at each moment in time. These insights align strongly with Program Alpha, where the PMO shifted dynamically between supportive activities, such as guidance, clarification, and facilitation, and more directive forms of control, including standardization, escalation, and governance enforcement, depending on the evolving integration context.

From a managerial perspective, this implies that PMOs should establish at least a minimal and temporary governance structure early in the integration, even when the final target operating model is not yet fully defined. For managers, adaptive governance requires the early establishment of escalation mechanisms and the clarification of responsibilities, particularly in areas where ownership is ambiguous. As integration challenges intensify, PMOs must be

prepared to alternate between supportive roles, such as facilitation and guidance, and more directive roles, including standardization and governance assurance, to maintain progress and coordination.

For students, this case highlights the limitations of traditional PMO typologies in fast-paced PMI environments and raises important questions about how governance modes should evolve across integration phases. It encourages reflection on when supportive governance becomes insufficient, when directive intervention is necessary, and how PMOs can recognize the appropriate moment to shift between governance roles without undermining flexibility or trust.

### **6.2.2 Technological Integration**

The case of Program Alpha demonstrates that technological integration in post-merger contexts extends beyond the technical consolidation of systems and constitutes a core organizational challenge. The migration of Microsoft tenants and the dependencies associated with ERP rollouts directly shaped employees' ability to perform their work, their readiness for integration, and their sense of inclusion within the new organization.

This observation aligns with Henningson et al. (2018), who identify information systems integration as a key determinant of post-merger value creation and one of the most disruptive phases of PMI. In Program Alpha, technological disruptions affected not only system access and functionality but also employees' daily routines and perceptions of belonging. Temporary integration setups, including dual accounts, restricted system access, and delayed migrations, increased uncertainty and intensified demands on support structures, highlighting the broader organizational and human implications of IT integration decisions.

For managers, technological integration should be governed as a central component of the integration strategy rather than managed as a technical function. PMOs therefore play a critical role in coordinating technological and functional workstreams, aligning timelines, and anticipating secondary effects resulting from delays in core systems across functions and regions. Staged migration approaches, such as phased or wave-based rollouts, allow organizations to progressively stabilize system access and mitigate integration-related disruption. Clear communication and the early management of expectations regarding temporary productivity constraints are essential to support employees during the transition.

From a pedagogical perspective, this case enables analysis of the trade-offs associated with different IT integration strategies and their implications for employee experience. Drawing on the typology proposed by Wijnhoven et al. (2006), Program Alpha illustrates how takeover strategies combined with temporary coexistence increase integration complexity and support requirements, reinforcing the governance role of the PMO in managing technological integration during PMI.

### **6.2.3 Organizational Alignment**

The findings from Program Alpha suggest that organizational alignment during PMI is strongly influenced by ongoing tensions between global standardization and local adaptation, reflecting well-established insights in the PMI literature.

Sarala & Vaara (2010), argue that integration success depends on reconciling global alignment with local responsiveness, rather than privileging either top-down or bottom-up approaches. In Program Alpha, alignment improved only when global and local teams jointly developed integration tasks and clarified expectations through facilitated coordination, rather than depending on pre-defined instructions.

In practical terms, these findings highlight the importance of early role clarification and the deliberate use of temporary structures during integration phases. PMOs are particularly well positioned to act as coordination bridges, translating global integration objectives into locally actionable steps while ensuring consistency across functions and countries. Regular alignment meetings, continuous follow-up, and the on-site presence of PMOs supported shared understanding, reduced role duplication, and strengthened execution discipline. This facilitative coordination role aligns with the integration management function described by Maire & Collette (2011).

In an educational context, the case demonstrates why neither fully centralized nor fully decentralized integration approaches are sufficient in complex, multi-country integrations. It encourages discussion on how hybrid governance structures can support both coordination and local flexibility, and how PMOs contribute to sustaining alignment over time.

#### **6.2.4 Communication and Employee Experience**

Program Alpha illustrates the critical role of communication practices in shaping employees' perceptions and responses during post-merger integration, particularly in contexts characterized by uncertainty and change. Unclear messaging, shifting timelines, and fragmented support channels intensified uncertainty and reduced employee confidence, especially during technologically intensive phases. These findings align with prior research identifying communication quality as a key determinant of employee engagement and psychological stability during PMI (Parveen et al., 2022).

In Program Alpha, communication challenges did not occur in isolation but interacted closely with technological disruptions, reinforcing perceptions of exclusion and diminishing employees' sense of belonging. This interaction highlights how communication practices influence not only information clarity but also employees' emotional and cognitive responses to integration.

For practitioners, the findings indicate that communication should be treated as a core governance responsibility rather than a secondary coordination activity. Clear and concise messaging, transparency when timelines change, and sustained visibility during periods of uncertainty are essential for maintaining trust. Direct interaction, such as on-site engagement and structured alignment meetings, proved particularly effective in providing reassurance and contextual clarification for local teams. The PMO's proximity to senior leadership further enabled rapid escalation and decision-making, supporting day-to-day stability and reinforcing its coordinating role, consistent with Magnúsdóttir (2012).

For teaching purposes, the case highlights the interdependence between communication practices, technological readiness, and employee experience during PMI. It encourages reflection on how communication can either mitigate or exacerbate uncertainty, as well as on the role of the PMO in actively shaping employee experience rather than responding reactively to emerging challenges.

### 6.3 Lessons Learned and Design Principles

In response to RQ3: “What lessons and design principles can inform future PMO-led integrations?”, the following table synthesizes key lessons learned and design principles derived from the PMO team’s perspectives and the previous analysis.

<b>Adaptive PMO Governance</b>	
1. Establish governance frameworks early	PMOs should introduce structured governance models as templates, deliverables, and approval flows from the beginning rather than depending on informal coordination or individual experience.
2. Use standardized templates and stable methodologies	Frequent methodology changes confuse teams and delay progress. Standardized templates maintain clarity across countries and functions.
3. Systematically document methodology, decisions, and lessons learned	Future PMO-led integrations should ensure that all steps, decisions, and integration practices are recorded, since verbal agreements tend to be forgotten during long initiatives. Formal documentation of methods, lessons learned, and integration steps builds organizational memory, supports accountability, and prevents rework.
4. Apply proven models rather than reinventing processes	Adopting an internally validated governance model, such as the Alpha methodology, reduces uncertainty and enables organizational consistency without relying excessively on external consulting frameworks.
<b>Technological Integration</b>	
1. Treat technology integration as an organizational transformation	IT systems shape work, access, and timing. PMOs must manage them not as technical tasks but as organizational dependencies impacting readiness and employee confidence.
2. Begin functional and regional integration in parallel	Running technical, functional, and country integration simultaneously instead of sequentially can significantly reduce total integration duration in large-scale programs

3. Provide country-specific readiness support and on-site assistance	“Day-1 workshops” and on-site PMO presence increase local readiness and reduce access issues during system migration.
4. Strengthen PMO technical capabilities	Continuous development of technical skills, including new integration tools and Artificial Intelligence solutions, improves PMO capacity to manage complex IT environments in global integrations.
<b>Organizational Alignment</b>	
1. Adopt hybrid governance: central design with local adaptation	Central standards alone were insufficient. Successful alignment required local adaptation of plans and contextualized deliverables.
2. Clarify roles and decision rights early	Duplicated responsibilities and unclear ownership slowed progress. Early temporary governance (PDOM) avoided ambiguity until final structures were defined.
3. Co-design deliverables with local teams instead of pushing top-down templates	Local knowledge was crucial for operational planning. PMOs must facilitate joint task design to ensure feasibility.
4. Act simultaneously as supportive and directive PMO	The PMO must guide execution (directive) while enabling learning, clarification, and coordination (supportive), not one or the other.
<b>Communication &amp; Employee Experience</b>	
1. Combine central messaging with local clarification and direct contact	Global communication alone was insufficient. Hands-on PMO presence (on-site, meetings) improved clarity and reassurance.
2. Use structured communication routines and a predictable integration cadence	Bi-weekly meetings, standard templates, and integration timelines reduce uncertainty and make expectations visible.
3. Protect employee experience through visibility and migration readiness	Delays, access issues, and unclear timelines strongly affected psychological experience, PMOs should prioritize visibility of migration steps.

4. Build networks and relationships across the organization	Strong internal networks and active stakeholder engagement improved communication flow, reduced escalation cycles, and accelerated issue resolution.
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Table 4 - Best Practices for a PMO team (Source: Developed by the author)

#### 6.4 Pedagogical Note

This case provides an opportunity for students to examine post-merger integration by focusing on the role of PMO governance, coordination mechanisms, decision structures, and communication practices. It is particularly suitable for advanced undergraduate and master's students in Project Management, Strategy, and Organizational Change, as well as for executive or professional programs addressing large-scale transformations.

#### Learning Objectives

After working with the case, the students should be able to:

1. Assess how PMOs contribute to governance, coordination, and decision-making during post-merger integration.
2. Identify key challenges associated with multi-country PMI and evaluate their organizational and human implications.
3. Analyze how specific PMO tools and governance mechanisms are used to stabilize execution under uncertainty.
4. Derive actionable design principles for PMOs operating in large-scale, complex integration environments.

#### Teaching Guidance and Discussion Questions

##### a) Role of the PMO in PMI

1. Which governance gaps in Program Alpha required immediate PMO intervention, and why were they critical for integration progress?
2. How did the PMO's ability to shift between supportive and directive roles influence decision-making and execution during PMI?

**b) Multi-Country PMI Challenges**

3. How did global and local misalignment affect coordination, execution speed, and decision-making across countries?
4. How did technological dependencies (e.g., ERP rollout and system migrations) intensify coordination challenges in a multi-country integration?

**c) Tools used to address PMI Challenges**

5. Which PMO tools or mechanisms were most effective in restoring structure after the initial “chaos” phase, and how were they applied?
6. How did standardized templates and sprint-based tracking contribute to coordination across functions and countries?

**d) Decision-Oriented Questions**

7. Which integration challenges could have been anticipated in advance, and which required adaptive, real-time PMO responses?
8. Based on the case, what key design principles should guide PMOs leading large-scale, multi-country post-merger integrations?

Students must read **Aubry (2015)** to understand how PMO roles evolve in response to organizational needs. Students without a project management background are additionally encouraged to read **Project Management Institute (PMI) (2021), Chapter 3**.

## **7. Conclusion**

### **7.1 Summary of Key Findings**

This thesis examined the main challenges encountered during post-merger integration, how Project Management Offices support and manage these challenges, and how PMOs contribute to shaping effective integration practices for future PMIs. Based on a qualitative case study of Program Alpha, the research provides empirical insights into how PMOs operate in complex and evolving integration environments.

The findings indicate that PMI is primarily challenged by governance adaptation, technological integration complexity, organizational alignment, and communication-related impacts on employee experience. In the absence of a predefined governance framework, the PMO in Program Alpha evolved dynamically, operating in supportive and directive roles as integration demands changed. This adaptive governance capability emerged as a key mechanism enabling coordination, decision-making, and execution under conditions of uncertainty.

Technological integration was identified as a critical determinant of both integration progress and employee experience. The consolidation of IT environments, particularly the migration of Microsoft tenants and ERP systems, significantly shaped daily work practices, access to information, and perceptions of inclusion. These findings reinforce the view that technology integration in PMI extends beyond technical implementation and represents a broader organizational transformation requiring close PMO involvement and cross-functional coordination.

The study also highlights the persistent tension between global standardization and local adaptation, underscoring the importance of hybrid governance structures. The PMO played a central bridging role by facilitating dialogue, clarifying responsibilities, and co-developing deliverables with local stakeholders to ensure alignment and feasibility. Furthermore, communication quality emerged as a decisive factor influencing employee experience, particularly during system migrations. Targeted communication routines and direct PMO engagement were found to mitigate uncertainty and improve readiness.

Overall, this study demonstrates that successful post-merger integration depends not only on strategic intent but also on the presence of a dedicated organizational structure responsible for integration governance and execution. When positioned as an adaptive, integrative, and human-centered unit, the PMO is indispensable for coordinating complex integration efforts and enabling value creation during PMI.

## **7.2 Contributions**

From a theoretical perspective, this research contributes to the PMI and PMO governance literature by showing that static PMO role typologies are insufficient to capture the dynamic role shifts required in large-scale integrations. The study advances existing frameworks by conceptualizing the PMO as an adaptive governance mechanism responsive to integration complexity. The application of the Gioia methodology further provides a rigorous and transparent link between individual experiences and higher-order theoretical insights.

From a practical standpoint, the findings offer actionable design principles for organizations undertaking PMI, including the early establishment of governance frameworks, systematic documentation of integration practices, and the prioritization of communication and employee experience as core governance concerns. Together, these insights support organizations in strengthening PMO effectiveness and improving integration outcomes in complex, multi-country merger contexts.

## **7.3 Limitations**

Despite its contributions, this study is subject to limitations inherent to its single-case design and qualitative approach, which may restrict the generalizability of the findings. The focus on one post-merger integration program involving two organizations means that the insights are context-specific and may not fully translate to other industries, organizational settings, or integration contexts.

Although the sample size was sufficient for qualitative analysis, it remains relatively small, and differences in participants' roles, seniority, and proximity to decision-making may have influenced the perspectives captured. The interpretative nature of the Gioia methodology and thematic analysis also introduces the potential for researcher bias, despite the use of systematic procedures and efforts to ensure transparency.

Furthermore, even with assurances of confidentiality and anonymity, interviewees may have exercised caution in expressing critical views, potentially limiting the depth of some responses. While secondary data supported triangulation and contextual understanding, such materials may reflect formalized processes rather than informal practices or undocumented challenges. As the integration is ongoing, available documentation may also be incomplete.

Acknowledging these limitations clarifies the scope of the study and reinforces the credibility of its methodological approach. Future research could build on these findings by examining multiple integration cases across industries, adopting longitudinal designs, or quantitatively testing the governance mechanisms and design principles identified.

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## **9. Appendices**

### **Appendix A: Interview Invitation and Briefing Email**

This appendix includes the email invitation and briefing message sent to interview participants. The email outlined the purpose of the study, explained the voluntary nature of participation, assured confidentiality and anonymity, and provided an overview of the interview process.

#### **A. Email for PMOs**

As part of my master's thesis, I am conducting a study that explores the key challenges faced by PMO during the post-merger integration process and how these were managed, using Program Alpha as a case study.

I would like to ask for your participation in a 30-minute interview, which has the following objectives:

- Identify the main challenges encountered by the PMO.
- Understand how these were addressed and resolved.
- Understand your perspective on what could have been done differently, based on what is known today.
- Gather advice for PMO teams starting similar integration programs.

All information will be confidential, and both the organization and the interviewees will be anonymized.

#### **B. Email for PMIs**

I am currently working on my master's thesis, which focuses on identifying the key challenges encountered during the integration journey and exploring how a PMO team can support in overcoming these challenges. My research uses the Program Alpha as a case study.

As part of my study, I would greatly appreciate the opportunity to conduct a short interview (around 30 minutes) with you to gain insights from your experience. I wanted to check if you might have any availability for this discussion sometime next week.

### C. Email for employees

I am currently working on my master's thesis, which focuses on identifying the key challenges encountered during the integration journey and exploring how a PMO team can support in overcoming these challenges. My research uses the Program Alpha as a case study.

As part of my study, I would greatly appreciate the opportunity to conduct a short interview (approximately 20 minutes) with you to gain insights into your perspective on the integration process and your views on the post-merger integration phase.

### Appendix B: Interview Participants Overview

The table summarizes the interview participants involved in Program Alpha, including PMO members, Integration Management Office (IMO) representatives, and employees from both organizations. Descriptions preserve anonymity while clarifying the relevance of each participant's role in the post-merger integration process. All interviews were conducted with informed consent.

#	Affiliation	Role At Time of Relevance	Location
1	Company Zeta	PMO	Portugal
2	Company Zeta	PMO	Germany
3	Company Zeta	PMO	Germany
4	Company Zeta	PMO	Germany
5	Company Zeta	PMO	Germany
6	Company Zeta	IMO	Germany
7	Company Zeta	IMO	Germany
8	Company Ventis	Employee	Germany
9	Company Ventis	Employee	Spain
10	Company Ventis	Employee	Germany
11	Company Zeta	Employee	Portugal

## **Appendix C: Interview Guide**

Below is the semi-structured interview questionnaire used during the data collection phase of this study. The questions were designed to explore the experiences, challenges, and perceptions of PMO members, IMO members, and employees involved in Program Alpha. Not all questions were asked to every interviewee. Instead, the interviewer adapted the sequence and emphasis based on each participant's role and expertise.

Additionally, a first exploratory interview (I1) was conducted as a pilot to gain an initial understanding of the program's scope, structure, and early challenges. Insights from this pilot interview informed and refined the final set of guiding questions, ensuring that subsequent interviews addressed the most relevant themes emerging from the integration process.

### **1. Role and Context**

1. Can you describe your role before and during the integration process, and explain how your responsibilities changed (if at all) after the migration or functional integration?

### **2. Program Scale, Structure, and Governance**

2. How would you describe the overall nature and scale of the Alpha program?
3. What were the main challenges faced by the PMO/IMO team?
4. What was the situation at the beginning of the integration planning phase?
5. How did the PMO/IMO structure support collaboration between teams and companies?
6. What governance mechanisms or methodologies were implemented to manage the integration?

### **3. Functional and Country Integration**

7. When and how did the functional integration begin?
8. How were integration plans developed at both global and local levels?
9. What challenges emerged during the creation of task lists or integration plans?
10. Were there challenges between global and local teams?

### **4. Organizational, Cultural, and People-Related Challenges**

11. Did you observe any cultural differences between Company Zeta and Company Ventis?
12. Were there challenges resulting from duplicated roles or structural changes?

13. How were communication gaps or misunderstandings addressed?
14. Was it harder to integrate people, processes or tools?

## **5. Technology and Systems Integration**

15. What were the main technological challenges faced during the integration?
16. Were there system access, ERP, or configuration issues that required special attention?
17. How effective was the onboarding to new tools and environments?

## **6. Employee Experience (Ventis and Zeta Employees)**

18. How would you describe the communication quality during your migration?
19. Were there delays or rescheduling, and how did they affect you?
20. What challenges did you face with access, systems, or support teams?
21. How was your onboarding?

## **7. Lessons Learned and Recommendations**

22. What were the most significant lessons learned throughout the integration?
23. Which practices proved most helpful or successful?
24. What recommendations would you give to PMO/IMO teams undertaking a similar project?

## **Appendix D – Interviews Transcript**

Below is the transcription from the semi-structured interviews conducted with PMO members, IMOs, and employees. Interviews lasted between 20 and 40 minutes and were transcribed and anonymized.

### **Interview I1 – PMO**

#### **Q1. How would you describe the nature and overall scale of the Alpha program?**

The Alpha program was a large-scale, long-term transformation initiative. Although the work was structured in sprints, internally we perceived the program as a “marathon” as a result of its duration, complexity, and the high number of stakeholders involved. The integration required coordinating thousands of tasks across 44 countries and functional areas. The overall integration evolved along two main tracks: Functional Integration, which required teams to begin working

together, and Country Integration, through which each country progressed toward full legal and operational consolidation.

**Q2. What was the situation at the start of 2023 when the integration planning began?**

At the beginning of 2023, Company Zeta had not yet acquired all shares of Ventis, meaning both organizations continued to operate as legally independent entities. Despite this, the integration program needed to begin, requiring teams to collaborate, make decisions, and escalate issues even though they formally belonged to two separate companies. This created a unique scenario in which “pre-integration collaboration” needed to be formalized before the acquisition was finalized.

**Q3. How did the PMO structure and support collaboration between two companies that were not yet fully integrated?**

To manage this transitional state, the PMO developed the Post-Delisting Operating Model (PDOM) in March 2023. This document defined the governance model, clarified responsibilities, outlined escalation paths, and established reporting lines. It also addressed duplicated roles resulting from the coexistence of two separate companies by assigning temporary ownership for each critical topic until the acquisition was completed. This governance structure ensured operational continuity despite the legal separation.

**Q4. When and how did the functional integration process begin?**

Functional integration formally began on August 1, 2023, when all functional areas were instructed to plan their integration activities. Given the number of functions involved, the PMO divided them into two waves known as “Buses”:

- Bus 1 functions were integrated on January 1, 2024.
- Bus 2 functions were integrated on June 1, 2024.

We often used the metaphor that everyone was at the airport trying to catch the same plane, but some teams needed to board the first bus while others boarded the second. This approach helped manage workload and dependencies more effectively.

**Q5. After the functional integration, how did the country integration process start?**

Once functional integration was completed, we shifted attention to Country Integration. One of the initial tasks involved reducing the number of legal entities in each country. Years of carve-ins and carve-outs had resulted in multiple overlapping entities in several jurisdictions, increasing complexity and operational costs. The country-by-country integration aimed to streamline legal structures and prepare each location for full consolidation.

**Q6. How was the process of reducing the number of legal entities structured and executed?**

The Alpha program conducted a comprehensive assessment of all 44 countries, identifying where both Zeta and Ventis were present. These countries were prioritized for a “legal entity cleanup.” Each country was asked to prepare a detailed plan identifying all existing legal entities and outlining the steps required to reduce them efficiently. These plans formed the basis for subsequent legal and operational consolidation activities.

**Q7. How did each team and country develop their integration plans, and how did the PMO contribute?**

Local teams were asked to create task lists and upload them to Excel. The PMO transferred this information into the central project management tool and monitored progress. I played a coordinating role, particularly in managing interdependencies, for example, when HR could not proceed because IT needed to complete an earlier task. The PMO ensured timelines were aligned, dependencies were properly sequenced, and both local teams and global leads were informed of constraints and blockers. This ongoing coordination was essential to maintaining coherence across countries and functions.

**Q8. What challenges emerged when defining the task lists, and how were global and local misalignments addressed?**

Several challenges emerged. Initially, local teams were simply told to “implement,” but they lacked integration experience and did not know what was required. In the second attempt, global teams provided standard task lists, but these were too generic and covered only about half of what each country needed. The final solution involved joint learning sessions between local and global teams, enabling them to develop country-specific task lists. Another challenge involved uncertainty regarding decision-making authority. The PMO escalated this issue to the Steering Committee, which determined that local teams could adapt task lists, but final approval had to come from global leads. This ensured a balance between flexibility and governance.

**Q9. How did the multi-step approval process operate, and what improvements were introduced?**

The approval process involved four sequential steps, each requiring signatures from six to seven stakeholders. If a document was rejected in Step 3, the entire process had to restart from Step 1, causing significant delays. To address this, we introduced automation through Power Automate, which streamlined routing, version control, and notifications. Approvers were also given a “nominate” function to assign substitutes during absences. The PMO also provided warnings to ensure approvers were prepared before the cycle began. This automation accelerated the process and reduced administrative workload.

## **Interview I2 – PMO**

### **Q1. During Alpha, what were the main challenges faced by the PMO team?**

One of the major challenges was the absence of a documented integration methodology.

Although people had the experience, there was no structured or systematic documentation, requiring us to build a new methodology from scratch.

### **Q2. So there was no documentation from previous integrations?**

No. Company Zeta was still relatively young, and although people had participated in prior integrations, no formal or structured plan existed.

### **Q3. What type of methodology did you need to build?**

I helped design a sprint-based approach with monthly deliverables and tracking lists, allowing us to monitor progress across all 16 functions simultaneously.

### **Q4. Were there cultural challenges between Zeta and Ventis?**

There were cultural differences, but the main complexity stemmed from the fact that this was an acquisition, not a merger. That reality shaped expectations and dynamics more than cultural aspects.

### **Q5. Was it difficult to integrate people in duplicate roles?**

Yes. Each function had to determine how to select a single leader for the merged organization. Often, two people performed the same role, one from Zeta and one from Ventis, so functions had to decide who would remain. Some areas conducted full interview processes, while others made more direct decisions. The degree of reorganization varied across functions.

### **Q6. What were the main technological challenges faced during the integration?**

The most complex challenge was merging two Microsoft tenants with more than 100,000 users, an unprecedented process even for Microsoft.

### **Q7. Was it harder to integrate people, processes, or tools?**

Processes and tools were especially difficult because the companies operated differently. For example, HR processes in Ventis were fully centralized, whereas Zeta operated with a more decentralized model.

### **Q8. Which practices contributed most effectively to the migration's success?**

Leadership kept an open mind and compared practices from both companies, adopting whichever solution made the most sense rather than defaulting automatically to Zeta's practices.

**Q9. What recommendations would you give to PMO/IMO teams undertaking a similar project?**

I strongly recommend having templates, documenting everything, and ensuring the presence of a central PMO. Thinking ahead and providing structure are essential in large-scale integrations.

**Interview I3 – PMO**

**Q1. Can you describe your role and day-to-day responsibilities?**

I served as Lead PMO, responsible for planning, monitoring milestones and tasks, conducting bi-weekly reviews with workstream leads, and ensuring consistent program reporting and governance.

**Q2. What were the main challenges faced by the PMO team?**

We needed to enhance transparency across functions, which was difficult due to the project's complexity and rapid pace. Connecting all components was challenging without adequate visibility. Misalignment between global and local teams, cultural integration issues, and technical limitations during IT migration were also significant obstacles.

**Q3. Were there cultural challenges between Zeta and Ventis?**

Yes. There were noticeable cultural differences, such as distinct Spanish, German, and Romanian working styles. However, the shared program vision made it easier for teams to adapt, and these differences remained manageable.

**Q4. Were there challenges with global and local teams? How were they addressed?**

Yes. Misalignment occurred because global teams had a high-level perspective, while local teams focused on operational implementation. As PMO, I often intervened to identify reasons for delays and facilitate realignment.

**Q5. What were the main technological challenges faced during the integration?**

The IT integration was the most challenging aspect. Migration occurred in 15 waves, one per week. Although most waves proceeded smoothly, users experienced access limitations, manual onboarding steps, and in some cases persisted in using local tools requiring tenant switching.

**Q6. What recommendations would you give to PMO/IMO teams undertaking a similar project?**

I would recommend continuously developing technical skills, building a strong internal network, and integrating new technological solutions, especially AI-driven tools, to support program management.

## **Interview I4 – PMO**

### **Q1. What were the main challenges faced by the PMO team?**

At the beginning, the team went through a “chaos” or “storming” phase. We were still trying to understand stakeholder roles, define the methodology, and assess whether existing deliverables were adequate. The methodology had to be tested with each country and repeatedly adjusted based on lessons learned.

### **Q2. Can you give an example of a lesson learned that required adjusting the approach?**

One critical lesson was the need to plan the ERP setup much earlier. Initially, we assumed the IT team would manage the entire configuration independently. But during planning, we realized that countries did not fully understand how the new ERP setup or future processes would function. Early joint planning proved essential.

### **Q3. Did you observe any cultural differences between Company Zeta and Company Ventis?**

Not significantly. The two companies had belonged to the same organization five years earlier, so the cultures were still somewhat aligned. The main difference was that Zeta had more structured processes, whereas Ventis operated with fewer formal procedures.

### **Q4. Were there challenges between global and local teams?**

Yes. Communication alignment was unclear at times, and global and local teams sometimes failed to speak the “same language.” As PMO, I often had to facilitate discussions and schedule calls to ensure understanding.

### **Q5. Did people from different countries react differently to the merger?**

Yes. Working with more than ten European countries revealed distinct communication styles. For example, I could be more direct with Balkan colleagues, while a more conversational approach was necessary with colleagues from the UK.

### **Q6. What were the main technological challenges faced during the integration?**

Initially, collaboration was hindered because teams operated in separate IT environments. We could not see each other’s calendars or availability, and even simple scheduling required manual coordination.

### **Q7. What recommendations would you give to PMO/IMO teams undertaking a similar project?**

Document everything. Verbal commitments often disappear, so written confirmation is essential. Avoid reinventing solutions, use existing processes, keep deliverables simple, and ensure they can be applied across countries.

## **Interview I5 – PMO**

### **Q1. What were the main challenges faced by the PMO team?**

The first major challenge was the ineffective setup of the Human Resources (HR) integration team. All key stakeholders were new, including the HR lead and the project manager, resulting in an unstable structure. HR quickly became one of the most problematic areas of the program.

### **Q2. Why was HR particularly challenging?**

Responsibilities were unclear, roles were fragmented, and tasks were not proactively managed. HRIT operated as a separate system, creating duplicated processes and confusion regarding ownership. For example, during initial employee transfers, necessary HRIT adjustments were not completed, causing employees to appear in incorrect organizational structures for weeks.

### **Q3. Did you observe any cultural differences between Company Zeta and Company Ventis?**

Among employees with Zeta backgrounds, integration felt natural. However, parts of the Ventis organization had evolved with less structure and more fragmented responsibilities, making it difficult to obtain clear information.

### **Q4. Were there challenges with global and local teams?**

Yes. Local teams were initially hesitant to contact global leads, and global leads were sometimes unaware of country-level activities. Alignment improved gradually through structured review meetings, reminders, and escalations.

### **Q5. What were the main technological challenges faced during the integration?**

Ensuring that all business processes, such as mandates, purchase orders, accounting procedures, and access rights, functioned correctly in the ERP system. Early go-lives, like Australia, exposed underestimated complexities and reinforced the importance of country-specific support.

### **Q6. What recommendations would you give to PMO/IMO teams undertaking a similar project?**

Use a clear, standardized set of templates and maintain methodological consistency. Frequent changes confuse teams and slow progress.

## **Interview I6 – IMO**

### **Q1. What were the main challenges faced by the Integration Management Office?**

One of the biggest challenges was ensuring that all functions understood how to work together. Some functions were well prepared, while others had minimal awareness and required significant onboarding, particularly at the country level.

### **Q2. What governance mechanisms or methodologies were implemented to manage the integration?**

Functional teams did not use workflow approvals. Each function governed its own processes, and cross-functional issues were escalated to the Steering Committee. Country-level integration required signatures from all major functions and regional leaders to confirm alignment with the Target Operating Model (TOM).

### **Q3. Did you observe any cultural differences between Company Zeta and Company Ventis?**

Yes, but differences were more related to functional mindset than nationality. Some functions were already integrated, while others still operated in a “them versus us” mode.

### **Q4. Were there challenges with global and local teams?**

Yes. Communication was inconsistent. Some countries were well informed, while others had not heard of the integration even after two years. We bridged these gaps through structured communication routines.

### **Q5. How did you address communication gaps?**

I established bi-weekly meetings between central and local IT teams, which provided clarity on expectations, tasks, and expert contacts. This approach became a best practice.

### **Q6. How do you onboard a country with little knowledge of the integration?**

I begin with a management kick-off, ideally on-site, to build empathy. Then I schedule functional and cross-functional workshops, weekly meetings with the project manager, and bi-weekly meetings with the broader team.

### **Q7. What recommendations would you give to PMO/IMO teams undertaking a similar project?**

Adopt the Alpha methodology entirely, including processes, templates, governance, and communication rhythm, as it has been validated in practice.

## **Interview I7 – IMO**

### **Q1. What were the main challenges faced by the IMO team?**

The main challenge was ensuring the program had a clear and structured integration plan from the outset. Creating the board approval were essential to managing a complex multi-country integration.

### **Q2. How did you decide which countries should be integrated first?**

We prioritized countries based on tax implications, system readiness, and potential benefits. Canada was selected first primarily due to tax considerations.

### **Q3. Did you observe any cultural differences between Company Zeta and Company Ventis?**

Yes, but these differences were rooted in structural rather than national differences. Ventis was highly centralized, while Zeta operated in a decentralized, country-managed model.

### **Q4. Can you give an example?**

Accounting responsibilities illustrate the issue. In Ventis, accounting was centralized in Spain, but after integration, countries had to assume this workload without receiving additional headcount.

### **Q5. Were there challenges with global and local teams?**

Communication worked well due to a strong internal network. When responsibilities were unclear, I escalated issues directly to Global Process Owners, who quickly resolved them.

### **Q6. What were the main technological challenges faced during the integration?**

Before joining the same IT tenant, collaboration was limited due to different email domains and calendars. Ultimately, the ERP rollout, especially delays in Latin America, became the most significant technical challenge.

### **Q7. What recommendations would you give to PMO/IMO teams undertaking a similar project?**

Start with a well-designed integration plan and run functional and country integration in parallel to save significant time.

## **Interview I8 – Employee, Company Ventis**

### **Q1. Can you describe your role before and after the migration?**

My role as an IT architect remained unchanged after joining Company Zeta.

### **Q2. How would you describe communication quality during the migration?**

Communication was unclear, poorly structured, and often came from unknown senders. Emails were long, confusing, and lacked clear instructions.

**Q3. Did you experience delays or rescheduling?**

Yes. My migration was postponed four times without explanation.

**Q4. Did you notice cultural differences?**

Yes. Ventis worked in a more agile and Kanban-oriented way, while Zeta was more bureaucratic and process-heavy.

**Q5. What were the main technological challenges faced during the integration?**

Zscaler configuration problems, loss of system access, and the need to use two Microsoft accounts created additional complications.

**Q6. How was your onboarding?**

The team was welcoming, but the onboarding sessions felt too generic and overwhelming.

**Q7. What recommendations would you give to PMO/IMO teams undertaking a similar project?**

Communication must be clearer and more structured. I often felt lost during the process.

**Interview 19 – Employee, Company Ventis**

**Q1. Can you describe your role before and after the migration?**

My role remained essentially the same. I continued working with corporate systems and supporting users.

**Q2. How would you describe communication quality during the migration?**

Communication was inconsistent. Some announcements were timely, others delayed, and many were overly generic. Important information often arrived in large volumes mixed with items of varying relevance.

**Q3. Did you experience delays or rescheduling?**

Yes. Migration dates were rescheduled multiple times.

**Q4. Did you notice cultural differences?**

Yes. Ventis operated in a more flexible, informal, and agile manner, whereas Zeta had a more structured and formal culture.

**Q5. What were the main technological challenges faced during the integration?**

Some systems functioned as intended, but user-access systems required manual intervention after go-live. Many users were unsure of required actions, leading to increased support requests.

**Q6. How was your onboarding?**

Onboarding was generally positive, but the volume of changes and technical adjustments made the first weeks challenging. Support was available, though identifying the correct contact was sometimes difficult.

**Q7. What recommendations would you give to PMO/IMO teams undertaking a similar project?**

Clearer instructions, better preparation before go-live, and more targeted communication would have greatly improved the experience.

**Interview I10 – Employee, Company Ventis**

**Q1. Can you describe your role before and after the migration?**

I worked in the platform team at Ventis, focusing on Microsoft technologies. My role remained largely the same after joining Zeta, although the environment and processes were more structured.

**Q2. How would you describe communication during the migration?**

Communication was unclear and inconsistent. We received lengthy emails with excessive information, and I often did not understand what steps were required or who was responsible. There was a clear lack of structured guidance.

**Q3. Did you experience delays or rescheduling?**

Yes. My migration date changed multiple times, with little visibility regarding the reasons.

**Q4. Did you notice cultural differences?**

Yes. Ventis was pragmatic, fast-moving, and agile, while Zeta had multiple decision-making layers, resulting in slower processes that required adaptation.

**Q5. What were the main technological challenges faced during the integration?**

Several technical issues emerged post-migration. Known gaps in system integration became visible, and multiple configuration steps failed, requiring manual adjustments. Users faced missing access rights, login problems, and system incompatibilities.

**Q6. How was your onboarding?**

Support was available but distributed across several teams, making it unclear whom to contact. This sometimes caused delays and duplicated efforts.

**Q7. What recommendations would you give to PMO/IMO teams undertaking a similar project?**

Clearer instructions, shorter and more targeted communication, and earlier preparation of technical requirements would have significantly improved the migration experience.

### **Interview I11 – Employee, Company Zeta**

#### **Q1. Can you describe your role before and after the migration?**

My role remained the same. We integrated colleagues from Ventis into our team and began working with them directly in the technology area.

#### **Q2. How would you describe communication during the migration?**

Communication was consistently clear and timely. Whenever I encountered an issue, I submitted a support ticket that was resolved promptly. Information regarding the integration was communicated transparently, and I always understood the upcoming steps.

#### **Q3. Did you experience delays or rescheduling?**

Yes, the migration was rescheduled multiple times. However, I considered this normal for a project of this scale. Many IT components were finalized later, and we adapted to interim solutions.

#### **Q4. Did you notice cultural differences?**

I did not perceive major cultural differences. Both organizations were international and customer oriented. However, Ventis was smaller, and colleagues from a smaller company needed time to adjust to Zeta's more structured processes.

#### **Q5. What were the main technological challenges faced during the integration?**

Some Ventis colleagues initially lacked company email addresses, and sharing via SharePoint was difficult because access needed to be configured. These issues significantly affected information flow. Full technical integration occurred progressively.

#### **Q6. How was your onboarding?**

I experienced onboarding positively. My team worked collaboratively to ensure a smooth integration. We organized a workshop to introduce workflows, present the business, and welcome new colleagues.

#### **Q7. What recommendations would you give to PMO/IMO teams undertaking a similar project?**

Communication must be clear and precise, so employees feel included. This was successfully achieved in our case. Additionally, colleagues should support each other throughout the integration, as collaboration is essential.

### Appendix E – Timeline of key events

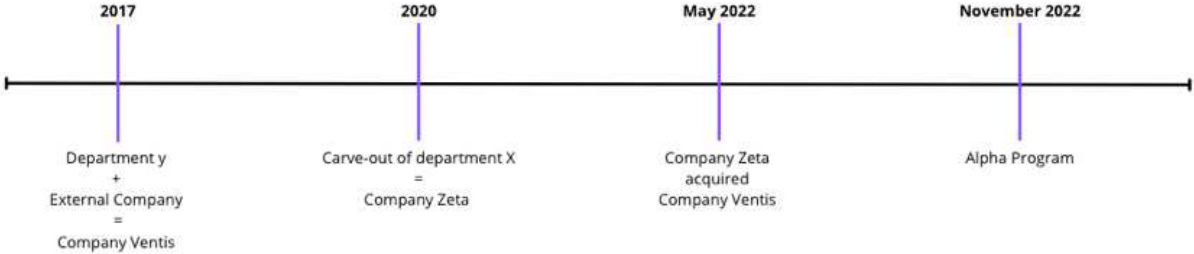


Figure 3 - Timeline of Key Events (Developed by the author)

### Appendix F – Overview of the geographical scope



Figure 4- Overview of the geographical scope (Source: Secondary Data)



# Appendix I – Escalation process

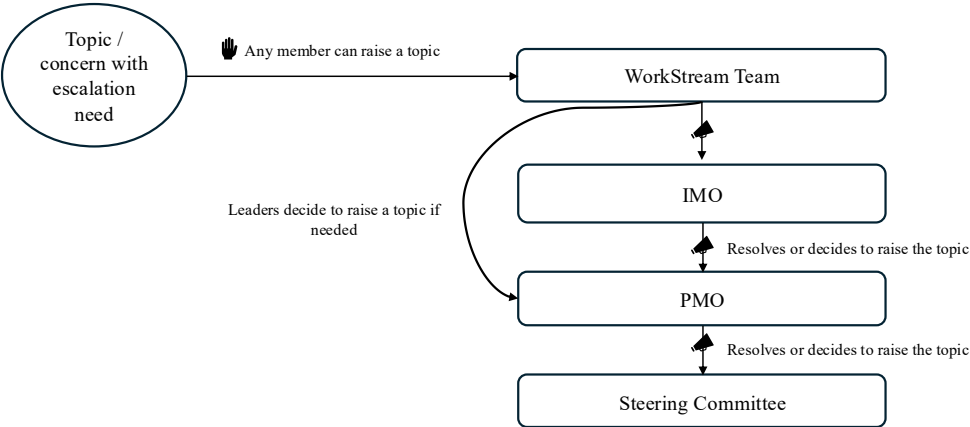


Figure 7 - Escalation Process (Source: Secondary Data, adapted by the author)