

CASE STUDY

Global Payments PMO Partners with Evolve Advisory Services for Strategic Guidance After \$24 Billion Merger



INDUSTRY:

Financial Services

GEOGRAPHIES:

Global

EMPLOYEES:

24,000

PLANVIEW SOLUTION:

**Evolve Advisory Services
by Planview®**

CHALLENGE

In one of the largest investments in the Fintech industry, Global Payments, a leading US-based payments technology company, purchased Total Systems Services, Inc. for \$24 billion in 2019. The acquisition instantly created a global powerhouse with over 24,000 employees across 130 countries. For the IT PMO at such a large enterprise, handling the challenges of mounting complexity and rapid organizational change meant acknowledging that the existing structures and processes governing the company would no longer suffice.

SOLUTION

Global Payments PMO partnered with Evolve Advisory Services by Planview to design and implement an enterprise-wide framework around organizational change management. Working closely with the practitioners at Evolve, Global Payments was able to design and implement the centralized processes that would bring its global teams together into the cohesive culture that defines the company today.



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– **RON BEATY,**
**PRINCIPAL PORTFOLIO
MANAGER**

ABOUT GLOBAL PAYMENTS

Headquartered in Atlanta, Georgia, with approximately 25,000 team members worldwide, Global Payments processes 50 billion+ transactions annually throughout North America, Europe, Asia Pacific, and Latin America. Global Payments is a Fortune 500® company and member of the S&P 500® with over 4 million customers utilizing its market-leading technology and worldwide commerce ecosystem.

CHALLENGE: THE DANGERS BENEATH THE SURFACE OF ORGANIZATIONAL CHANGE

Mergers and acquisitions in the financial payments industry reached record highs in 2019, and none made more headlines than Global Payments' blockbuster \$24 billion purchase of Total System Services, Inc. ("TSYS"). The deal, Global Payments' most ambitious ever, would add massive scale – bringing more of the payments value chain under one combined roof and creating the leading worldwide pure-play payments technology company.

Leadership at Global Payments understood that a positive return on its massive investment would depend upon its ability to swiftly integrate and manage the expanded business. For the IT PMO at such a large enterprise, quickly aligning projects with the larger corporate strategies – both current and emerging – was critical. Ron Beaty, Principal Portfolio Manager at Global Payments, was accustomed to change. "There was an acquisition every six months," says Ron, "and part of my role was assimilating the acquired companies into our processes."

Despite a successful track record of integrating acquired businesses, Ron understood that the size and scale of the TSYS merger put Global Payments in uncharted territory. "We go from 12,000 people to 24,000 people. We go from maybe 1,000 projects to 5,000 projects. New lines of business. New countries – going from around 80 to 130. And 98 currencies," says Ron, "Watch out for icebergs!"

"An iceberg," explains Ron, "is 20% above the surface, easily visible; 80% is below the surface. So when you bring that to the PPM world, you see an organization that seems to be doing well, they seem to fit with the direction that the company is going in, but underneath the surface, there is history. There are legacy processes, the emotional attachment after they've worked hard to implement what they do and the ownership they have of that. So, these icebergs need to be identified very early."

SOLUTION: ALIGNING BUSINESS STRATEGY WITH EMERGING CULTURE

What became apparent to Ron with the Global Payments/TSYS merger and subsequent efforts to establish enterprise-wide processes for project governance was that organizational change was the critical path and the one with the most icebergs. "We were two large companies – roughly the same size – coming together into one. Before this, there were other mergers and acquisitions within the two companies. So, we were constrained by two different cultures coming together and this third culture that nobody really understands kind of emerges. And just the fact that people don't like change so they are reluctant to adopt," Ron recalls.

"We know the questions the execs are going to ask. Are you going to finish on time? Do you have the resources? What's holding this up? Those types of big-level questions," says Ron. "And the folks a

level or two down are scrambling to understand the answers to those questions but they're doing it off the side of their desks – meaning completely manually. They have to get an answer, they don't have time to stop and think about all this new stuff. So, there's tension," says Ron. "How can we show them that while organizational change may be painful, it's beneficial?" To help answer these questions and ensure Global Payments' organizational processes and readiness were aligned to enable change and power growth, Ron turned to his partnership with Evolve Advisory Services by Planview. "I wanted somebody who's done this before," says Ron.

Evolve advisors are industry experts – a team of 'been there, done that' practitioners – with career experience in business-side roles as project managers, portfolio managers, and heads of PMOs. Calling on their real-world experience with mergers and acquisitions, Evolve engaged in eye-to-eye discussions with Ron and his team at Global Payments to diagnose the pain points and provide guidance around implementing organizational change management. Evolve advisors shared best practices for bringing teams spread across disparate systems and methodologies into a centralized process.

RESULTS: ESTABLISHING COHESIVE PROCESSES THROUGHOUT THE GLOBAL COMMUNITY

The \$24 billion story behind Global Payments' most successful merger and integration in company history was rooted in organizational change management. "We had to have everybody on Global Payments up and running. We had to get those global portfolios defined across the new enterprise and then focus on aligning these projects with the corporate goals," says Ron.

The footprint of the Global Payments' PMO now spans 1,000 project managers and resource managers, over 7,000 team members, 4,200 active projects, over 170 major prioritized projects – visible to executive leadership, and 340 new projects per month that make it into the value stream. Employing advice from Evolve Advisory Services by Planview, all Global Payments' projects are now governed through a centralized process, intake through execution.

"Evolve came in and helped us build a path to change and still meet our business objectives in all lines of business. We didn't interrupt, we didn't have to make special accommodations for a particular business unit because we didn't plan for them or implement right," says Ron.

FUTURE: POSITIONED TO CAPITALIZED ON EXPANSION OPPORTUNITIES

As disruptive fintech upstarts move to offer more traditional financial services, legacy titans have responded by investing in strategic acquisitions to diversify their solutions and vie for consumers. Global Payments will continue to focus on merger and integration activities as part of its strategy to achieve market expansion.

"We've actually created a new organization within the portfolio team, Organizational Change Management," says Ron. "We're going to institutionalize it. We're going to make it part of our roadmap to start with organizational management practices, policies, and move forward from there in order to minimize the trauma of change." Ron continues, "This gives us and the Evolve team something to align on. We're looking now at options of where we go over the next three years and Evolve will be a key part. We appreciate their experience. They've seen a lot and can point out where there might be potential icebergs."

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