M&A and divestiture identity risk checklist

A practical guide for reducing long-term identity risk after mergers, acquisitions, and divestitures

M&A and divestiture identity projects are often considered complete once users can access systems and business continuity is restored. However, unfinished identity work frequently leaves behind long-term operational complexity, inconsistent governance, and unnecessary security exposure. This checklist helps infrastructure and security practitioners identify and reduce residual identity risk before temporary coexistence becomes permanent architecture.

Define what “done” actually means

Many organizations stop identity work once users are productive, even though legacy exposure and coexistence remain in place.

- ☐ Define success beyond business continuity and immediate migration milestones
- ☐ Document which legacy environments, trusts, and coexistence mechanisms must ultimately retire
- ☐ Establish ownership for cleanup, decommissioning, and long-tail migration activities
- ☐ Identify application dependencies that could delay source environment retirement
- ☐ Align infrastructure, security, and application teams on the intended end state

Identify residual identity risk

Most long-term exposure comes from unresolved coexistence, inherited permissions, and inconsistent policy enforcement.

- ☐ Inventory trusts, SID history, synchronization jobs, and coexistence dependencies
- ☐ Identify applications still dependent on source-side infrastructure
- ☐ Review inherited permissions and overlapping administrative models
- ☐ Assess policy inconsistencies across domains, tenants, and identity platforms
- ☐ Document areas where temporary migration access may persist beyond cutover

Reduce long-term exposure

Temporary migration constructs become liabilities if they are never deliberately unwound.

- ☐ Remove temporary migration permissions and administrative access
- ☐ Retire unnecessary trusts and synchronization pathways
- ☐ Eliminate duplicated identity administration where possible
- ☐ Rationalize permissions and entitlement structures
- ☐ Reduce policy exceptions introduced during coexistence

Complete operational modernization

Migration is not complete until legacy pathways, dependencies, and governance gaps are resolved.

- ☐ Migrate or remediate remaining application dependencies
- ☐ Retire legacy routing, authentication, and identity pathways
- ☐ Standardize governance and policy enforcement across environments
- ☐ Validate recovery and rollback capabilities for identity and permissions
- ☐ Ensure operational documentation reflects the final architecture

Validate the end state

A successful identity modernization effort leaves the environment cleaner, simpler, and more governable than before.

- ☐ Legacy domains and coexistence models are fully retired
- ☐ Identity governance is simpler and easier to audit
- ☐ Privileged access is reduced and controlled consistently
- ☐ Access policies align to a clear governance model
- ☐ The environment is more resilient and governable than before the transaction

Quest Secure Migration is designed for moments when identity change introduces the greatest business risk.

Whether driven by M&A, divestiture, or cloud and Entra ID modernization, Quest helps organizations consolidate and transform identity without sacrificing security or continuity. By reducing inherited risk, maintaining control during change, and ensuring environments emerge simpler and more governable than before, Quest enables modernization with confidence. Further perspective on identity modernization and Secure Migration is available at Identity modernization for Microsoft.

About Quest Software

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