

M&A Deal Diligence and its Open Source Benefits



Nithya Ruff

**Sr. Director, Open Source
Practice, Comcast**



Gil Yehuda

**Sr. Director of Open
Source, Yahoo**

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Session Takeaways

- M&A Diligence is part of your Open Source Program duties.
- Audits do more than abate risk. Seek to reap benefits too.
- Those who are prepared for an audit, automatically have better engineering practices.

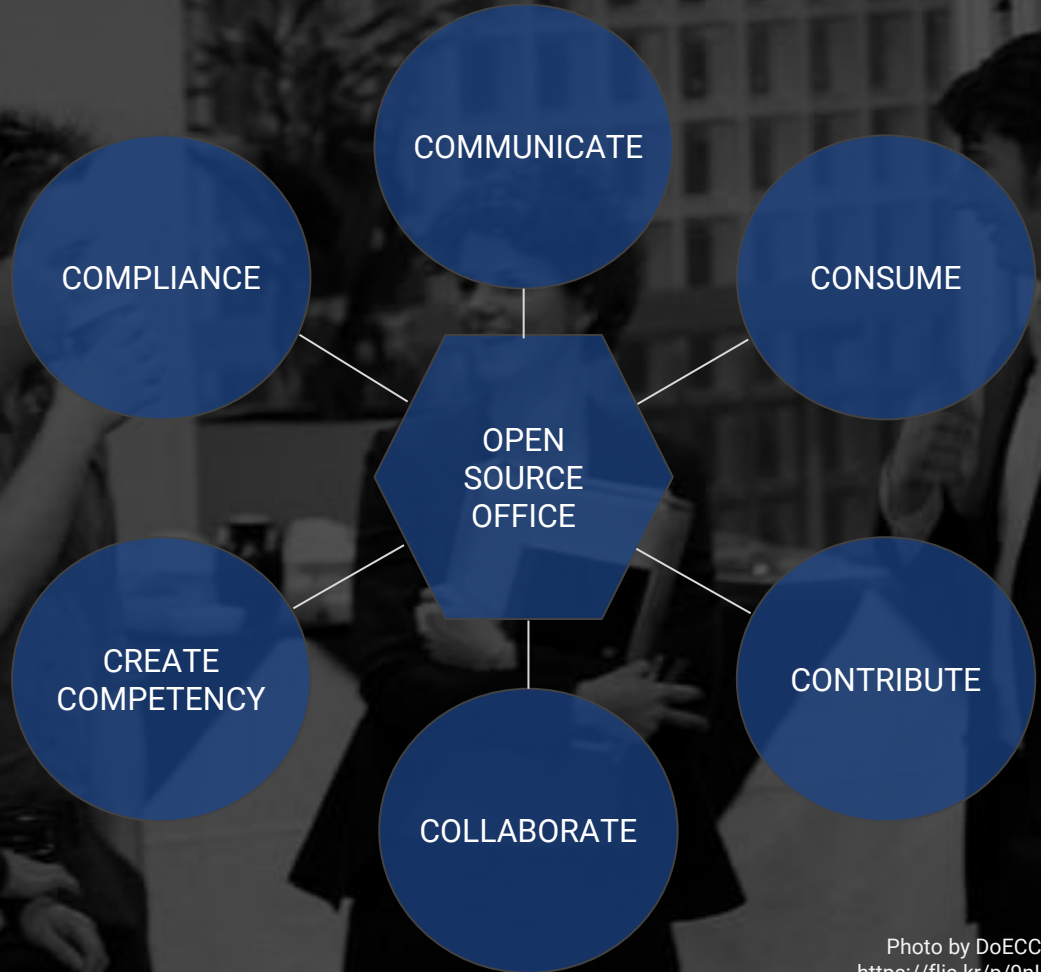
No one talks about M&A

**But we're the open source
program folks, so we do.**

- 97% of companies use Open Source. *
- Compliance auditing is hardly an exciting topic in context of a big deal. But it matters.
- The speed of your exit is at risk of an auditing issue.

The Open Source Program Office

- The center of open source expertise in your company.
- The person or people to call when there's an open source question.
- The service, not the process.



Every deal is different

Deal Drivers

- talent
- technology
- product
- customers
- market
- investment
- opportunity

Deal Profile

- risk areas
- tech stack
- complexity
- likelihood of closing

Soft Factors

- relationship with the target

The Audit Process



1. Review the deal
2. Assess what needs to be looked at and how
3. Perform the review, identify findings
4. Prepare outcomes, e.g.
 - a. pre-deal remediations
 - b. post-deal activities
 - c. open source potential

Reaping *benefits* from the audit



Created by Klara Zalokar
from Noun Project

Discover open source
experts at the target



Created by Hsa Poh Lin
from Noun Project

Create the tipping point
to the deal



Created by anbilenu adaleru
from Noun Project

Discover open source
practices from the target

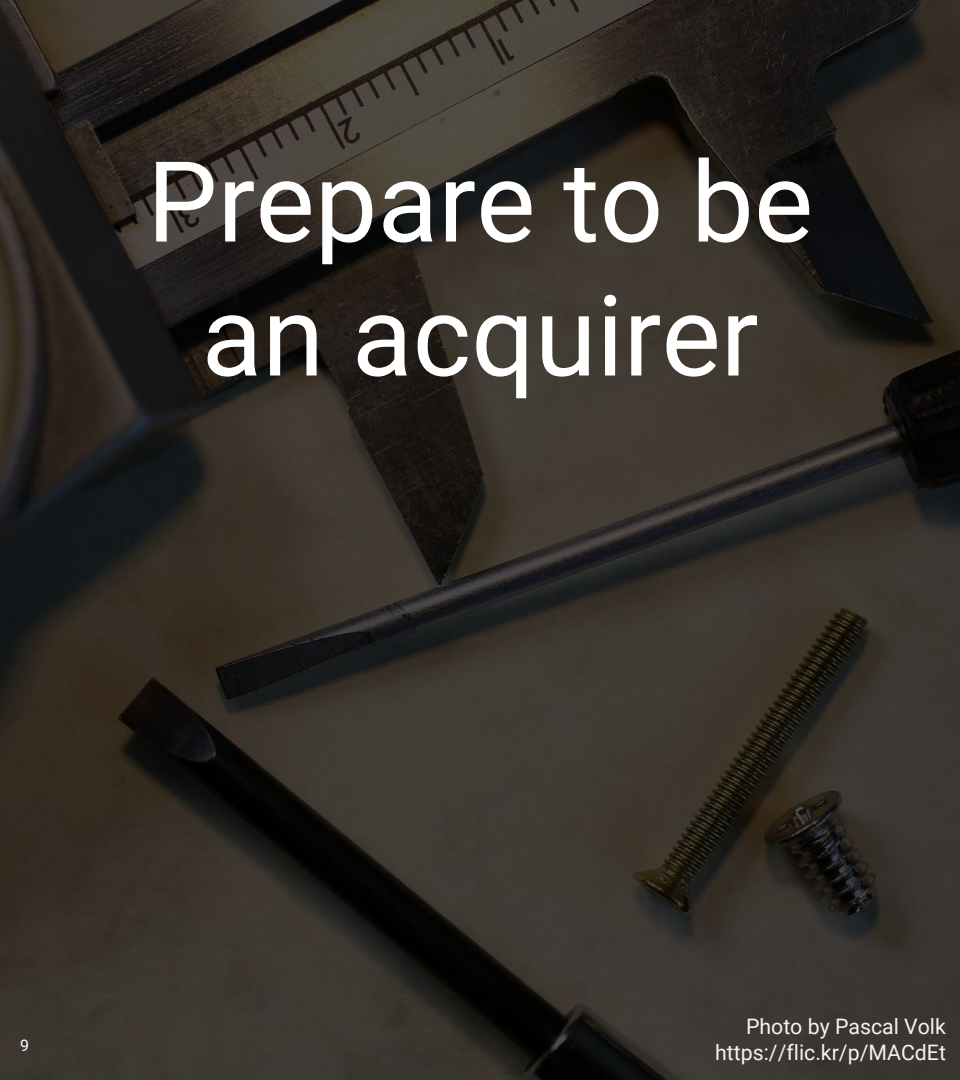


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Discover engineering
practices via the report



Prepare and be Open



Prepare to be an acquirer

- Work with your M&A team to understand which deal you need to be included in
- Get a vendor you trust and review the process before meeting the target
- Define what you actually care about:
 - license, attribution, compliance
 - security & version management

Prepare as a potential target



- Know what's in your code
- Know what you distribute
- Know what it means to comply
- Know how you upgrade versions and how you mirror/sync with open source projects

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TODO

A Community for
Open Source Program Office
Professionals

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