

PE Post-Deal Commercial Checklist

First 90 Days A commercial diligence-to-action sequence for the post-close period.

WEEK 1–2 Discovery

- ◆ **Identify where revenue is actually coming from.** Which segments, products, and customer types are driving the number?
- ◆ **Audit CRM data quality.** What's trustworthy vs. what's a graveyard?
- ◆ **Map the full sales ecosystem:** direct sellers, distributors, channel partners, reps
- ◆ **Document the current sales motion (or confirm one doesn't exist)**
- ◆ **Identify the "hero" sellers.** What happens to revenue if they leave tomorrow?

WEEK 3–4 Pricing & Pipeline

- ◆ **Review pricing structure.** When was the last real pricing review? Any discount drift?
- ◆ **Map pipeline by segment.** Where are deals actually closing vs. where the strategy says they should?
- ◆ **Assess forecast reliability.** Does the board number hold up under scrutiny?

WEEK 5–6 Dependencies & Relationships

- ◆ **Identify founder-dependent customer relationships that need transition plans**
- ◆ **Review contracts with third-party marketing vendors:** agencies, content teams, consultants
- ◆ **Evaluate marketing/sales alignment on ICP and messaging**

WEEK 7–8 Quick Wins & Cadence

- ◆ **Identify 2–3 process improvements that can show value before the next board meeting**
- ◆ **Establish weekly pipeline review cadence**
- ◆ **Set up reporting that the leadership team will actually use**

*Bringing a new company into the portfolio? **Let's make the first 90 days count.***