

Pre-sale operational readiness checklist

Financial readiness

- Financials reviewed and normalized
- One-time expenses identified and documented
- Revenue streams clearly categorized
- Forecasting model available
- Tax exposure reviewed

Operational readiness

- Core services documented
- Client onboarding/offboarding processes standardized
- Tool stack rationalized and licensed correctly
- Vendor dependencies identified
- SLAs and escalation paths documented

People & leadership readiness

- Org chart reflects actual operations
- Key roles have backups
- Employment agreements up to date
- Incentive plans documented
- Retention risks identified

Client & revenue risk

- Client concentration analyzed
- Contract assignability confirmed
- Churn drivers understood
- Upsell dependency documented

Technology & security readiness

- Internal security policies documented
- Access controls reviewed
- Backup and recovery tested
- Incident response plan documented
- Compliance obligations identified