

Private Equity Operator: The First 30 Days After Acquisition Checklist

Stabilize your portfolio company fast **without hiring a full-time CFO or rebuilding the finance department**

INSTRUCTIONS

Use this checklist immediately after acquisition close. Go section by section and mark each item as:

1. Complete
2. In Progress
3. Missing

Any “Missing” items represent areas where operational friction, reporting confusion, or financial blind spots can quietly build during the first month after acquisition. This is not an accounting checklist. It’s a stabilization checklist.

	Complete	In Progress	Missing
Week 1 — Visibility & Control			
Leadership Visibility			
1. Leadership has access to current cash balances			
2. Existing reporting process has been reviewed			
3. Financial responsibilities are clearly assigned			
4. Key finance contacts have been identified			
5. Investor reporting deadlines are documented			
Immediate Risk Areas			
1. Outstanding liabilities have been reviewed			
2. Known reporting issues are documented			
3. Existing forecasting process has been evaluated			
4. Leadership understands where financial data currently lives			
5. No major dependencies exist on one employee’s spreadsheets			
Week 2 — Reporting & Cash Flow			
Reporting Stability			
1. Monthly reporting cadence is defined			
2. KPI definitions are documented			
3. Revenue reporting is consistent across teams			
4. Leadership trusts the financial data being presented			
5. Reporting timelines are realistic and repeatable			
Cash Visibility			
1. Cash runway has been reviewed			
2. Large upcoming expenses are mapped			
3. Collections timing is understood			
4. Leadership has visibility into short-term liquidity			
5. Cash surprises are being tracked and reduced			
Week 3 — Forecasting & Decision Support			
Forecasting Readiness			
1. A forward-looking forecast exists			
2. Hiring plans are tied to financial visibility			
3. Budget assumptions are documented			
4. Leadership can model best-case and downside scenarios			
5. Decisions are not relying solely on historical reporting			
Operational Finance			
1. Major finance workflows are documented			
2. Teams are not duplicating financial work manually			
3. Reporting processes are scalable			
4. Financial systems are integrated where possible			
5. Leadership can identify operational bottlenecks quickly			
Week 4 — Investor Confidence & Stability			
Investor Readiness			
1. Reporting packages are presentation-ready			
2. Leadership can confidently explain financial performance			
3. Board materials are not being assembled last minute			
4. Metrics are consistent month-to-month			
5. Investor questions can be answered quickly			
Stabilization Check			
1. Leadership has confidence in the numbers			
2. Reporting no longer feels reactive			
3. Key financial blind spots have been identified			
4. The company has a cleaner operational baseline			
5. Decision-making speed is improving instead of slowing			

Why This Is Important

Most portfolio companies do not fail immediately after acquisition. What usually happens instead:

1. reporting gets delayed
2. forecasting becomes unreliable
3. cash visibility weakens
4. leadership starts making decisions with incomplete information

The first 30 days determine whether the company stabilizes quickly... Or quietly turns into an operational cleanup project. This checklist helps private equity operators establish visibility, discipline, and confidence before small problems compound into expensive ones.

Book a 15-Minute Strategy Conversation

We’ll help you identify where financial visibility, reporting, and operational finance may be slowing down your portfolio company after acquisition.

<https://bluebird-partners.com>