

# Private Equity Operator: The First 7 Days After Acquisition Checklist

Take control immediately after close **without** hiring a full-time CFO or waiting for problems to surface.

## INSTRUCTIONS

Use this checklist during the first week after acquisition. For each item, mark:

- Complete
- In Progress
- Missing

The goal is not perfection. The goal is visibility. Anything marked "Missing" represents a potential blind spot that can create reporting confusion, cash surprises, operational friction, or investor confidence issues later.

	Complete	In Progress	Missing
<b>Day 1: Establish Visibility</b>			
<b>Leadership Visibility</b>			
<ul style="list-style-type: none"> <li>• Current cash balances have been reviewed</li> <li>• Bank account access is verified</li> <li>• Financial reporting owners have been identified</li> <li>• Existing reporting process has been documented</li> <li>• Investor reporting deadlines are known</li> </ul>			
<b>Immediate Risk Review</b>			
<ul style="list-style-type: none"> <li>• Outstanding liabilities have been reviewed</li> <li>• Known accounting issues have been documented</li> <li>• Major vendor relationships have been identified</li> <li>• Existing financial systems have been mapped</li> <li>• Critical spreadsheets have been identified</li> </ul>			
<b>Day 2–3: Validate The Numbers</b>			
<b>Reporting Confidence</b>			
<ul style="list-style-type: none"> <li>• Revenue reporting process is understood</li> <li>• Monthly financial package has been reviewed</li> <li>• KPI definitions are documented</li> <li>• Management reporting matches financial reporting</li> <li>• Leadership understands where data originates</li> </ul>			
<b>Financial Consistency</b>			
<ul style="list-style-type: none"> <li>• Teams are using the same numbers</li> <li>• No duplicate reporting exists</li> <li>• Forecast assumptions are documented</li> <li>• Margin calculations are understood</li> <li>• Historical reporting concerns have been identified</li> </ul>			
<b>Day 4–5: Secure Cash Control</b>			
<b>Cash Visibility</b>			
<ul style="list-style-type: none"> <li>• Current runway has been reviewed</li> <li>• Large upcoming expenses are identified</li> <li>• Collections process is understood</li> <li>• Weekly cash visibility exists</li> <li>• Short-term liquidity risks are documented</li> </ul>			
<b>Decision Readiness</b>			
<ul style="list-style-type: none"> <li>• Leadership can explain current cash position</li> <li>• Major spending decisions have visibility</li> <li>• Hiring plans have financial context</li> <li>• No major unknown cash risks exist</li> <li>• Financial data supports decision-making</li> </ul>			
<b>Day 6–7: Create Stability</b>			
<b>Operational Readiness</b>			
<ul style="list-style-type: none"> <li>• Reporting cadence has been established</li> <li>• Financial responsibilities are clearly assigned</li> <li>• Leadership has confidence in the numbers</li> <li>• Critical finance processes are documented</li> <li>• No single employee owns all financial knowledge</li> </ul>			
<b>Investor Readiness</b>			
<ul style="list-style-type: none"> <li>• Reporting expectations are clear</li> <li>• Board reporting requirements are documented</li> <li>• Financial communication process is established</li> <li>• Leadership can answer basic investor questions</li> <li>• Immediate post-close blind spots have been identified</li> </ul>			

### Why This Is Important

Most acquisition problems don't happen during diligence. They happen during the first week after close. That's when leadership discovers:

- reporting isn't as clean as expected
- cash visibility is weaker than assumed
- forecasts are unreliable
- key processes only exist inside someone's head

The first 7 days set the tone for everything that follows. Get visibility early and you can fix problems while they're small. Miss them, and they become expensive distractions later. This checklist helps private equity operators establish control before operational friction compounds.

## Book a 15-Minute Strategy Conversation

We'll help you identify where financial visibility, reporting discipline, and cash control may be creating hidden risk inside your portfolio company.

<https://bluebird-partners.com>

The goal isn't better accounting.  
The goal is better decisions.