

Exit Readiness Scorecard

Rate your company across five dimensions. Circle one option per row (1 = Not started, 5 = Ready).

01 FINANCIAL READINESS					
	Not started	Early stage	In progress	Nearly there	Ready
1. 3+ years of clean, audited financials	☐	☐	☐	☐	☐
2. EBITDA normalized (owner perks and one-time costs removed)	☐	☐	☐	☐	☐
3. Recurring revenue is more than 50% of total revenue	☐	☐	☐	☐	☐
4. No single customer represents more than 20% of revenue	☐	☐	☐	☐	☐
5. AR, collections, and contracts are current and clean	☐	☐	☐	☐	☐
Section score:	____ / 25				

02 OPERATIONAL READINESS					
	Not started	Early stage	In progress	Nearly there	Ready
1. Business runs without the owner day-to-day	☐	☐	☐	☐	☐
2. Processes and SOPs are documented	☐	☐	☐	☐	☐
3. Tech stack is modern, scalable, and well-documented	☐	☐	☐	☐	☐
4. Cybersecurity and compliance posture is strong	☐	☐	☐	☐	☐
5. Key person dependencies identified and mitigated	☐	☐	☐	☐	☐
Section score:	____ / 25				

03 LEGAL & STRUCTURAL READINESS					
	Not started	Early stage	In progress	Nearly there	Ready
1. Cap table is clean with no disputes or pending equity issues	☐	☐	☐	☐	☐
2. All IP is properly assigned to the company	☐	☐	☐	☐	☐
3. Customer and vendor contracts are assignable to a buyer	☐	☐	☐	☐	☐
4. No outstanding litigation or regulatory exposure	☐	☐	☐	☐	☐
5. Entity structure reviewed for tax efficiency at exit	☐	☐	☐	☐	☐
Section score:	____ / 25				

04 TEAM & PEOPLE READINESS					
	Not started	Early stage	In progress	Nearly there	Ready
1. Senior leadership team is strong and buyer-ready	☐	☐	☐	☐	☐
2. Key employees have retention agreements in place	☐	☐	☐	☐	☐
3. Plan exists for communicating a deal to employees	☐	☐	☐	☐	☐
4. Culture is documented and intentional	☐	☐	☐	☐	☐

04 TEAM & PEOPLE READINESS

5. Succession plan exists for all critical roles

☐

☐

☐

☐

☐

Section score:

____ / 25

05 MARKET POSITIONING

	Not started	Early stage	In progress	Nearly there	Ready
1. Clear, compelling narrative for buyers	☐	☐	☐	☐	☐
2. Valuation range and target buyers are understood	☐	☐	☐	☐	☐
3. Sell-side advisors identified or engaged	☐	☐	☐	☐	☐
4. CIM / pitch materials are ready or drafted	☐	☐	☐	☐	☐
5. Deal structure preferences and walk-away terms defined	☐	☐	☐	☐	☐
Section score:	____ / 25				

TOTAL SCORE

____ / 125

Score guide:

100-125 Exit-ready

75-99 Getting close

50-74 In progress

0-49 Early stage

What's your next move?

Use this scorecard to identify your biggest gaps before going to market. The earlier you start, the stronger your position — and the better your outcome.

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