# The First 100 Days After the Deal

A checklist for the CEO of a company that has just taken a private-equity investment or completed an acquisition. Print it, put a name next to each box, and review it with your leadership team every two weeks.

## Days 1-30: Get the facts straight

- [ ] **Name one person to own the list of promises made to the new owner**. That covers the investment thesis, the 100-day plan, lender covenants and reporting promises. One list, one owner, reviewed monthly. Owner: CEO appoints (often the CFO or General Counsel).
- [ ] Write down who is accountable for each number the new owner or lender will ask for, and the date it is due. Owner: CFO.
- [ ] Meet your top 10 customers and your key employees in person or by phone. Say what is and is not changing. Owner: CEO.
- [ ] List the decisions that now need the board or the sponsor's approval, so nobody finds out by accident. Owner: General Counsel or CFO.

## Days 31-60: Make the numbers reliable

- [ ] Produce one monthly report that the owner, the lender and your managers all use. Same figures, same definitions. Owner: CFO.
- [ ] Compare actual results to the plan promised at closing, and write down every gap with a reason. Owner: CFO.
- [ ] Check the major contracts for change-of-control terms, consents and notice dates. Owner: General Counsel.
- [ ] Agree who runs each part of the 100-day plan, with one weekly check-in. Owner: COO or CEO.

## Days 61-100: Hold the plan together

- [ ] Run a first full-quarter close and board package on time, then ask the owner what they want changed. Owner: CFO.
- [ ] Review the covenant calculations against current forecasts, before the lender asks. Owner: CFO.
- [ ] Decide which roles, systems and vendors stay, change or go, and tell people. Owner: CEO.
- [ ] Re-read the promise list. Mark what is done, late or at risk, and report it to the board. Owner: the list owner.

## Where AI fits in the first 100 days

- [ ] Find out who in the company already uses AI tools, and for what. Ask, do not audit. Owner: COO.
- [ ] Set one simple rule: no customer or pricing data goes into any AI tool unless the company has approved that tool. Owner: General Counsel or CEO.
- [ ] Do not buy an AI platform until the monthly reporting is stable. Owner: CEO.

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Take what helps, drop what does not.

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