ACQUISITION IT CHECKLIST

YOUR BLUEPRINT FOR SCALABLE, SECURE GROWTH

Technology can be the engine behind a successful acquisition or the anchor that slows it down. For private equity firms, overlooking any aspect IT during due diligence can lead to costly surprises, delays, and security risks. This Acquisition IT Checklist will help you assess, align, and optimize IT from day one, ensuring smoother transitions, scalable growth, and stronger returns.

IT DUE DILIGENCE

- ☐ Evaluate IT infrastructure health and scalability – Review systems, performance, and capacity for future growth.
- ☐ Identify technology risks and legacy systems – Look for outdated hardware, shadow IT, or unlicensed software.
- ☐ Verify compliance obligations – Confirm alignment with HIPAA, PCI, SOC 2, or other relevant regulations.

CYBERSECURITY POSTURE

- ☐ Assess existing cybersecurity controls – Review endpoint protection, firewalls, MFA, and data encryption.
- ☐ Evaluate threat exposure and incident history – Look into past breaches, phishing attacks, or known vulnerabilities.
- ☐ Protect sensitive data during transition – Ensure secure handling of customer, financial, and health-related data.

INFRASTRUCTURE COMPATIBILITY

- ☐ Review system compatibility with portfolio standards – Assess operating systems, platforms, and architecture.
- ☐ Determine cloud vs. on-prem infrastructure – Identify what can be migrated or integrated into existing environments.

STANDARDIZATION + CENTRALIZATION

- ☐ Plan for system unification – Create a timeline for migrating email, collaboration tools, and servers.
- ☐ Map out consolidation or segmentation needs – Decide what should be merged, kept separate, or phased out.

IT COST ANALYSIS + EFFICIENCY

- ☐ Look for vendor and tool overlap – Identify duplicate software or underutilized licenses.
- ☐ Find opportunities for cost savings – Explore volume licensing, cloud cost optimization, or support contract rationalization.

SCALABILITY + GROWTH READINESS

- ☐ Evaluate IT's ability to scale – Ensure infrastructure can handle user growth, geographic expansion, or M&A plans.
- ☐ Check for modern, efficient systems – Look at automation, integrations, and cloud-native solutions for back-office efficiency.

CHANGE MANAGEMENT + USER ADOPTION

- ☐ Prepare communication and training plans – Reduce friction with timely support, onboarding, and clear messaging.
- ☐ Anticipate cultural resistance – Work with leadership to drive adoption and smooth operational transitions.

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