

Is Your Business Exit Ready?

The Essential Checklist for Business Owners

✔ **Essential B2B businesses.** Use this checklist to assess your readiness.

Financial Foundation

- ☐ Clean financial statements for the past 3 years
- ☐ EBITDA with clear documentation
- ☐ Consistent profit margins year-over-year
- ☐ Minimal customer concentration (no single customer >20% revenue)
- ☐ Clean books with personal expenses separated

Operations & Systems

- ☐ Documented standard operating procedures (SOPs)
- ☐ Business can operate without owner for 2+ weeks
- ☐ Key management team in place
- ☐ CRM current and in place
- ☐ Vendor relationships documented and transferable
- ☐ Equipment maintenance records current
- ☐ Safety and compliance documentation up to date

Legal & Compliance

- ☐ All licenses and permits current
- ☐ No pending litigation or significant liabilities
- ☐ Employee agreements and non-competes in place
- ☐ Intellectual property properly registered
- ☐ Insurance policies adequate and current
- ☐ Environmental compliance documentation (critical for industrial)

Market Position

- ☐ Established presence
- ☐ Repeat customer base with multi-year relationships
- ☐ Competitive advantages clearly identified
- ☐ Growth opportunities documented
- ☐ Industry certifications current
- ☐ Strong sector reputation

Value Drivers

- ☐ Recurring revenue or long-term contracts
- ☐ Asset base properly valued and maintained
- ☐ Proprietary processes or specialized expertise
- ☐ Trained workforce with low turnover
- ☐ Real estate owned (not leased) where applicable
- ☐ Multiple revenue streams or service lines

Get Your Personalized Exit Strategy Guide

Subscribe to learn more on how to maximize your business value and prepare for a successful exit.

[Subscribe for Weekly Insights](#)

[Exit Multiple Calculator](#)

Contact Pillar Optimization Partners