

*Aventis Advisors*

# SaaS Exit Readiness Dashboard

Prepare for a successful exit with our 40-point checklist

**Get your copy!**

# SaaS Exit Readiness: 40-point checklist to your dream exit

Your exit preparation should be divided into manageable categories, so you don't overlook crucial elements that could make or break your sale

## Key exit preparation topics

Area of business	Example topic to prepare for
Financial	Have you prepared 3-year financial projections with growth scenarios?
Product & Tech	You have a 1–3-year product roadmap
Sales & Marketing	You listed the company on software directories (G2, Capterra)
Customer Success	You have a dedicated customer support/success team
Operations & HR	You maintain an employee roster with staff positions, salaries, locations, etc.
Legal & Compliance	Your company brand name and product name are a registered trademarks
Exit Preparation	You have clearly decided on the sale
Inbound Interest	Are you receiving any inbound offers already?

[Get a copy of the dashboard](#)

## Comments

- We have built an easy-to-use dashboard for SaaS founders who are planning to exit their business
- You need to fill in a checklist of questions from eight different areas of your business as shown in the left table
- The dashboard will give you an **“exit readiness score”** from 1-100 that tells you how prepared you are for an exit
- Try it now – [Download the Exit Readiness Dashboard](#)

# SaaS Exit Readiness Dashboard: How to use?

Our dashboard is a powerful tool designed to help founders understand their level of preparedness for a business exit on a scale of 0-100

## Steps

1 Create a copy of our exit readiness dashboard

2 Answer some questions from different areas of your business - Yes/No/Partially

3 Our dashboard determines your preparedness for an exit on a scale of 1-100. We also recommend you the optimal time need to be fully prepared for an exit!

## Action

[Create a copy](#)

### Inputs

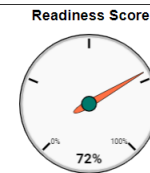
Review each question and select "Yes", "No" or "Partially". Your Readiness Score will be determined by the number of questions you answer and their level Priority: 1 - High, 2 - Medium, 3 - Low

Financial Processes	Completed?	Weight	Score
You calculate and monitor key SaaS KPIs (churn, NRR, LTV/CAC, etc.) on a monthly basis	Yes	30%	30%
You implemented a budgeting process and perform regular updates and reviews	Yes	30%	30%
You prepared 3-year financial projections with growth scenarios	No	20%	0%
You have implemented revenue recognition on an accrual basis	Partially	10%	5%
You perform a financial audit with a reputable firm	No	10%	0%

### Result:

Needs <6 months preparation

Category	Completion %
Financial Processes	65%
Product & Technology	65%
Sales & Marketing	70%
Customer Success	100%
Operations & HR	78%
Legal & Compliance	40%
Exit Preparation	60%
Inbound Interest	100%



# About Aventis Advisors

We advise founders of **technology and growth** companies on company exits and strategy.

Our focus sectors are **Software and IT Services**.

Our job is to make sure you **sell at the right time to the right people** for the best valuation.

Technology M&A focus

Cross-border expertise

Thought leadership

*Aventis Advisors*



# Contact us

*[Get in touch with our advisors](#)* to discuss how much your business could be worth and how the M&A process looks.



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