

Sample report (illustrative)

Illustrative example. Not a real company. All names and figures are invented to show the format.

PRE-DEAL SURVEY: EXAMPLE SERVICES LTD

46 staff · B2B services · founder-led · three weeks before signing. Evidence: data-room documents, one founder interview and two manager interviews.

Summary

Founder dependency sits mainly in three places: customer relationships worth 34% of revenue, bid pricing, and cover for critical roles. Four of 20 indicators are green, and three of the five areas are red: customers, knowledge and team. The calendar below plans all three handovers inside the first 100 days, with about 3 to 4 hours a week of the founder's time.

Five areas

Area	Colour	Green indicators
Customers	Red	1 of 4
Decisions	Amber at best (K4 unknown)	0 of 4
Knowledge	Red	0 of 4
Team	Red	1 of 4
Systems and authorities	Amber	2 of 4

An area takes the colour of its weakest indicator. There is no total score.

Scorecard

ID	Indicator	Measured value	Colour	Evidence: document + confirmation
M1	Founder-held revenue	34% (Customers A, B, C). A is 14% and deals only with the founder	Red	Top-10 customer table + 2 manager interviews
M2	New sales led by others	41% of new-customer revenue	Amber	New-customer list + manager interview
M3	Contracts tied to the company	71% of revenue	Amber	Contract list + 8 of 10 signed contracts
M4	Customer records in a shared system	10 of 10 in the CRM; 5 people have access	Green	CRM records + manager interview
K1	Founder's final say on 20 decisions	9 of 20 (45%). Founder said 8; the worse answer counts	Amber	Decision list + managers' answers
K2	Written authority table	Complete, updated March 2026. Staff awareness not measured	Amber	Authority table + survey needed
K3	Approvals that go to the founder	11 of 25 (44%); 10 approved unchanged	Amber	Last 25 approvals + manager interview
K4	Waiting for approval	Request dates not recorded	Unknown	Approval log, approval dates only
B1	Work only the founder can do	2 of 22 critical processes, including bid pricing	Red	Process list + 2 manager interviews
B2	Work only one person can do	5 of 22 (23%)	Amber	Process list + manager interview

ID	Indicator	Measured value	Colour	Evidence: document + confirmation
B3	Written, owned and current	13 of 22 (59%)	Amber	Instruction index + manager interview
B4	Instructions in use	8 of 13 (62%)	Amber	Instruction index + manager interview
E1	Tested deputies	4 of 9 critical roles (44%)	Red	Leave records + 2 manager interviews
E2	Founder absence test	No fully offline week in 12 months; phone approvals during the founder's August holiday	Red	Leave record + 2 manager interviews
E3	Second-tier managers	2 with budget and hiring authority, 2+ years in post	Amber	Org chart + manager interview
E4	Founder's direct reports	6, each the head of an area	Green	Org chart + 2 manager interviews
S1	Payments	2 approvers besides the founder; dual approval above £10,000 for everyone; phone check on bank changes	Green	Payment policy + bank mandate
S2	Admin rights to key systems	2 to 4 admins on each of 5 systems; emergency access never tested	Amber	Admin lists + manager interview
S3	Monthly figures	Full pack in 8 working days; prepared by the Finance Lead	Green	Last 3 packs + issue dates in the ledger
S4	Legal continuity	2 directors; no registered business LPA; 2 bank signatories	Amber	Companies House record + bank mandate

The five riskiest dependencies

1. Founder-held customers (M1). Customers A, B and C, 34% of revenue, deal only with the founder. To close: a second relationship owner for each, three joint meetings, then the 4-week Changeover Test; 8 to 10 weeks, 1.5 founder hours a week. Bears on: price, any revenue-based earn-out and the founder's transition period.

2. Bid pricing (B1). Only the founder prices bids. To close: the founder writes a one-page pricing rule with a £ limit, and the Commercial Manager moves through shadow, reverse shadow and working alone to the 4-week test; 8 to 10 weeks, 1 founder hour a week. Bears on: any margin-based earn-out and who sets prices after completion. Where earn-out disputes were common, 43% of BRG's respondents cited operational control after completion as a cause.

3. Cover for critical roles (E1, E2). Five of the nine critical roles have no tested deputy, and the founder has not been fully offline for a week in 12 months. To close: each deputy runs the role for 2 weeks, then a founder absence test in week 13; about 12 weeks, 30 founder minutes a week. Bears on: retention terms for the founder and the two senior managers.

4. Single-person processes (B2). Five of 22 critical processes depend on one person. To close: name a deputy for each and run two weeks of cover; 6 to 8 weeks, no founder time beyond sign-off. Bears on: day-one continuity and retention terms for those five people.

5. Untested emergency access (S2). Admin rights are spread, but emergency access has never been tested. To close: one test per system; 2 weeks, no founder time. Bears on: the completion checklist and the first-week systems handover.

Transfer calendar: first 100 days

Weeks	What happens	Founder time
1	Three-way kick-off. The founder drafts the transition calendar; the buyer approves it. Emergency access tested	3 hours
2 to 3	Staff survey and 5-day founder log, now possible. K2 and K4 measured	2 hours

Weeks	What happens	Founder time
4	Decision session: the founder decides what stays and what moves. The 10 unchanged approvals move first	2 hours
5 to 12	Customers A, B, C: introductions, joint meetings, 4-week test. Bid pricing in four stages. Deputies cover 5 roles. Monthly board page	3 to 4 hours a week
13	Founder absence test: 1 to 2 weeks fully offline, one emergency contact	None
14	Final scorecard and board page. Remaining items get an owner and a date	2 hours

Changeover Test candidates

A task counts as handed over when a named person has done it for 4 weeks without the founder stepping in.

Role	Candidate for	Indicators
Account Director	Second relationship owner for Customers A, B and C	M1
Commercial Manager	Bid pricing under a written rule and £ limit	B1, K1
Operations Manager	The 10 approvals the founder signed unchanged	K3
Deputies in delivery and finance	Cover for the 5 critical roles without a tested deputy	E1

What we could not confirm

- **Staff survey.** The seller declined one before signing, so confirmation came from manager interviews and second documents. K2 stays amber until measured.
- **K4.** Request dates were not recorded. Waiting time is measured in weeks 2 to 3.
- **Two contracts.** Two top-10 contracts (9% of revenue) were not in the data room. We counted them as not tied, so M3 may improve once seen.

Commissioned by [Buyer]. Prepared by Freedom Architects.

Independence: Freedom Architects has not prepared Example Services Ltd for sale or advised its owners, and gives no valuation, price or contract advice.

Data: no email, chat or phone records were asked for or held; survey results are shown only for groups of 5 or more.

Sources: [BRG M&A Disputes Report 2025](#)