

Sell-Side Due Diligence Decision Tree



Initial Request is Received from the Potential Investor

Determine the Underlying Question or Purpose of the Request

Tip
Be sure to understand the request BEFORE spending time running analyses!

Document or Discuss Response?

Tip
Many times a quick conference call can answer a question or request and avoid the need for creation of a formal report or analysis.

Discuss

Document

Tip
Prepare written bullet points and take notes during call – you will possibly need to have the same conversation with another investor later.

Set a time for discussion

Does existing documentation exist?

No

Yes

Can the request be reframed or existing information tweaked to satisfy the request?

Provide existing documentation

Tip
Reframing and repurposing are underused tactics during the diligence process. Increase responsiveness by finding ways to use existing data instead of taking days or weeks building something from scratch.

Determine what data/analysis is possible and reasonable, plus timing and limitations

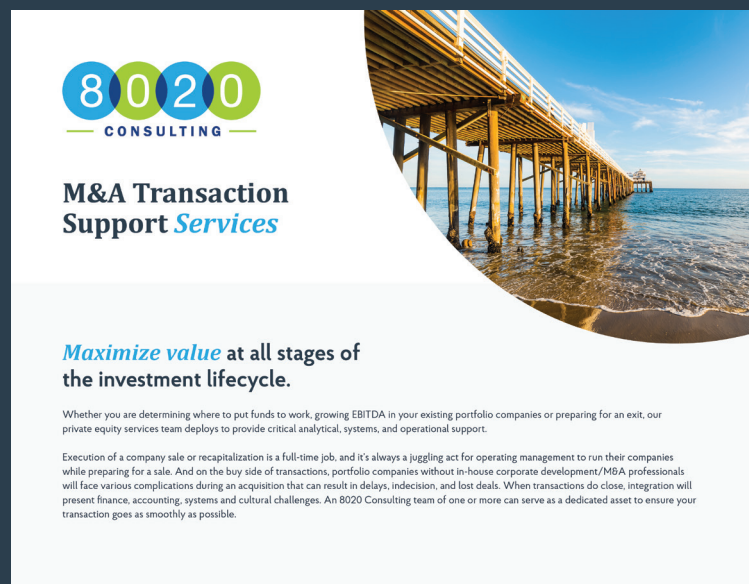
Fulfill reframed request or tweak existing documentation

Before spending time creating, communicate with requestor your timing and proposed deliverable

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***Maximize value* at all stages of
the investment lifecycle.**

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