

# IT Due Diligence Checklist

A practical, print-friendly checklist to help you confirm the key IT documents investors typically request and to surface execution risk early.

## How to use this checklist

Tick what you have ready, label what is pending, and keep an owner/date next to any gaps. If you share via a secure data room, keep sensitive files view-only and track access via audit logs.

Document category	What to include
<b>Architecture and environment overview</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Network and infrastructure diagram (core systems + connections)</li><li><input type="checkbox"/> Hosting model (cloud / on-prem / hybrid) and key environments</li><li><input type="checkbox"/> Uptime/SLA targets and known outage history</li></ul>
<b>Core systems inventory</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> List of business-critical applications (product, billing, ERP/CRM, data tools)</li><li><input type="checkbox"/> Business owner for each system and operational impact if unavailable</li><li><input type="checkbox"/> Data sources that support revenue recognition and reporting</li></ul>

<b>Integrations and data flows</b>	<input type="checkbox"/> Integration map (APIs, middleware, ETL) and data movement between systems <input type="checkbox"/> Manual transfers or spreadsheet uploads that create operational risk <input type="checkbox"/> Sensitive data flows (PII, payment data) and where it is stored
<b>Scalability and performance</b>	<input type="checkbox"/> Capacity planning vs growth targets (users, volume, geographies) <input type="checkbox"/> Peak-load and performance metrics; bottlenecks and limits <input type="checkbox"/> Monitoring, alerting, and incident response procedures
<b>Technical debt and roadmap</b>	<input type="checkbox"/> Legacy or end-of-life systems and vendor support status <input type="checkbox"/> Upgrade / modernization roadmap (next 12-18 months) with owners <input type="checkbox"/> Estimated remediation cost for priority gaps and quick wins
<b>IT cost structure (run-rate)</b>	<input type="checkbox"/> Software licensing spend with key cost drivers and escalation terms <input type="checkbox"/> Hosting and infrastructure spend (current + projected with growth) <input type="checkbox"/> Support contracts, managed services, and hidden fees

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<b>Vendor contracts and licensing exposure</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Top vendor list with renewal dates, pricing model, and transfer rights</li> <li><input type="checkbox"/> Termination clauses, penalties, and audit/compliance obligations</li> <li><input type="checkbox"/> Synergy / renegotiation opportunities and constraints</li> </ul>
<b>Hosting and third-party reliance</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cloud/hosting agreements and service-level commitments</li> <li><input type="checkbox"/> Disaster recovery and business continuity evidence (RPO/RTO if available)</li> <li><input type="checkbox"/> Third-party access controls and escalation paths</li> </ul>
<b>Cybersecurity and compliance</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Security overview and any prior incidents with response notes</li> <li><input type="checkbox"/> Identity and access management (least privilege, privileged access)</li> <li><input type="checkbox"/> Prioritized vulnerabilities with remediation timelines</li> </ul>
<b>IT organization and governance</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> IT org chart, key roles, and skills coverage (gaps vs growth plan)</li> <li><input type="checkbox"/> Outsourced IT responsibilities and oversight model</li> <li><input type="checkbox"/> Change management and release process (incl. source code controls)</li> </ul>

<b>Carve-out / integration readiness</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Shared systems with parent or affiliates; separation dependencies</li><li><input type="checkbox"/> Transitional services needs (TSAs) and estimated stand-up timeline/cost</li><li><input type="checkbox"/> Integration plan if combining platforms (migration sequencing)</li></ul>
<b>Deal-impact summary</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Top red flags that could change valuation, timeline, or deal terms</li><li><input type="checkbox"/> Items requiring pre-close remediation or closing conditions</li><li><input type="checkbox"/> 30-60-90 day post-close plan (security, governance, upgrades)</li></ul>

Tip: Store sensitive technical files in one secure workspace with role-based permissions, watermarks for exports, and audit logs you can share with advisors and buyers.