90-Day Post-Acquisition Integration Checklist

For Indian SME Acquisitions
MergerDomo | mergerdomo.com/resources/post-acquisition-integration-india

Print this checklist and work through it phase by phase. Assign an owner to each section and track completion as you go.

For Day 1 communication templates, the document handover checklist, and the seller transition tracker, download the full checklist PDF at the link above.

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DAY 1–30 | STABILISE

The window to retain employees, reassure customers, and establish banking control is narrow. Everything in this phase is about preventing value from leaving before you have had a chance to build it.

People

- Identify all key employees before Day 1 — map during due diligence
- Prepare retention approaches and packages before closing
- Hold individual conversations with every key employee within 2 weeks
- Confirm retention arrangements in writing where applicable
- Map informal hierarchy — who actually makes decisions day-to-day
- Confirm PF, ESIC, and gratuity obligations are funded and current

Customers

- List top 10–15 customers by revenue before Day 1
- Map each key customer relationship — founder-led vs. employee-led
- Schedule joint seller-buyer customer visits — calendar locked before closing
- Complete personal visits to top 10–15 customers within 30 days
- Assign a named point of contact from new team to each major customer
- Brief customer-facing employees on what to say if customers ask questions

Day 1 Communications

- Employee communication drafted and approved before closing
- Key customer communication drafted — joint with seller where possible
- Supplier communication drafted for top 10 suppliers
- Lender / bank manager communication drafted
- All communications delivered on Day 1 or within 48 hours of closing
- Seller present / jointly visible for internal and key external communications

Banking and Signatories

- Change all bank account signatories on Day 1
- Revoke previous owner's access to all bank accounts immediately
- Bank relationship manager visit scheduled within 2 weeks
- Bank NOC / personal guarantee release confirmed complete per SPA

Compliance — Immediate

- Statutory compliance calendar confirmed with CS before closing
- No GST filing gaps at date of closing
- No TDS default at date of closing
- PF and ESIC contributions current at date of closing
- No ROC filing arrears

DAY 31–60 | CONTROL

Establish proper financial controls and confirm all statutory obligations are running under your management. The working capital peg is settled and accounting migration begins.

Financial Systems

- Accounting migration to buyer's systems begun or vendor engaged
- Weekly working capital tracker established and reviewed personally
- Working capital peg settlement process initiated with CA
- Bank statement reconciliation for first month completed
- Vendor and customer master data verified and transferred to your systems
- Debtor ageing reviewed — compare to pre-closing baseline

Compliance — Ongoing

- First GST return (GSTR-1 and GSTR-3B) filed under new ownership
- TDS deposited and return filed for applicable period
- PF contribution deposited for first month under new ownership
- ESIC contribution deposited for applicable period
- Professional tax confirmed and filed where applicable
- All pending tax notices and demands reviewed; responses tracked

Insurance and Suppliers

- All insurance policies reviewed; change-of-control notifications sent where required
- Coverage gaps identified and addressed
- Top 10 suppliers contacted and credit terms confirmed
- Single-source dependencies identified and contingency considered
- Supplier contracts reviewed for change-of-control clauses

Seller Transition — Month 2

- Banking relationship introductions completed (joint with seller)
- Key supplier meetings completed (joint with seller where applicable)
- Seller transition tracker reviewed in weekly integration meeting
- Outstanding transition deliverables from SPA tracked and followed up

DAY 61–90 | IMPROVE

With continuity secured and controls in place, build the foundation for value creation — capture institutional knowledge, manage cultural change deliberately, and track the investment thesis.

Processes and Knowledge

- Key operational processes documented — not left in individuals' heads
- Critical system credentials and process knowledge captured in writing
- IT systems and data security basic review completed
- ERP / accounting migration completed or firm timeline confirmed

Cultural Integration

- Changes introduced so far communicated with rationale, not just instruction
- Remaining policy and reporting changes prioritised and sequenced
- Informal feedback gathered from key employees — any concerns surfacing?

Licences and IP

- Licence and permit renewal register complete with dates
- Any outstanding IP transfer (trademark, patent, domain) completed and filed
- Sector-specific licences confirmed as valid and in company's name

Synergy and Reporting

- Each synergy from investment thesis assigned an owner
- Baseline metrics established for revenue and cost synergies
- First monthly synergy review completed
- Monthly management reporting cadence established
- Integration governance weekly meeting running consistently