Enrich Services

# Investor VDR Starter Pack

A starter checklist for organizing business, financial, legal, customer, HR and governance documents before investor, lender or transaction-readiness conversations.

## How to use this executive resource

Use this document as a working aid in a leadership, diagnostic, roadmap or advisory discussion. Capture current-state observations, gaps, decisions, owners and immediate next steps before initiating a larger implementation or transformation program.

## Core sections

• Corporate and statutory documents

• Financial statements and management MIS

• Customer, contracts and revenue evidence

• Product, technology and delivery documentation

• Risk, compliance and governance records

| Area | Current evidence | Gap / risk | Owner | Next step |
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## Recommended 30-60-90 day conversation

**First 30 days:** Clarify the business problem, current-state baseline, owners, available data and immediate quick wins.

**Next 60 days:** Run the focused diagnostic or workshop, define target-state operating model, prioritise initiatives and create governance cadence.

**Next 90 days:** Launch controlled pilots or execution waves, track adoption, review benefits and refine the roadmap.

## Scope note

This resource is intended for business-readiness and planning conversations. Legal, tax, regulatory, valuation, investment, data-protection and sector-specific compliance advice should be obtained from appropriately qualified professionals where applicable.

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