

Origination & Transaction Readiness

Use this diagnostic before outreach turns a working thesis into a live process. Mark status, name the evidence, and assign the next decision owner.

Suggested use: 30-minute leadership review | Work from the decision, not the deliverable | Record exceptions explicitly

01

MANDATE

What precise opportunity or transaction are we trying to originate, finance, acquire, sell, or advance?

Evidence / owner / open issue

STATUS ☐ Ready ☐ Partial ☐ Not ready ☐ N/A

02

QUALIFICATION

Which commercial, strategic, ownership, and timing criteria define a genuinely qualified opportunity?

Evidence / owner / open issue

STATUS ☐ Ready ☐ Partial ☐ Not ready ☐ N/A

03

COUNTERPARTIES

Which investors, buyers, sellers, operators, or partners could materially change the outcome - and why?

Evidence / owner / open issue

STATUS ☐ Ready ☐ Partial ☐ Not ready ☐ N/A

04

DECISION RISKS

What valuation, structuring, governance, regulatory, or operational issues are most likely to change the decision?

Evidence / owner / open issue

STATUS ☐ Ready ☐ Partial ☐ Not ready ☐ N/A

Turn the readiness review into an owned path

Complete the remaining questions, then reduce the review to three priority gaps, one recommendation, and a dated follow-up.

05

SEQUENCE

What is the true sequence of analysis, materials, diligence, counterparty, and internal approval decisions required to move credibly?

Evidence / owner / open issue

STATUS ☐ Ready ☐ Partial ☐ Not ready ☐ N/A

06

TIMING

Which conversations should happen now, and which should wait until the thesis, materials, or evidence base improves?

Evidence / owner / open issue

STATUS ☐ Ready ☐ Partial ☐ Not ready ☐ N/A

07

UNKNOWNNS

What remains uncertain after the first pass, and how should those unknowns be tested next?

Evidence / owner / open issue

STATUS ☐ Ready ☐ Partial ☐ Not ready ☐ N/A

08

RECOMMENDATION

If the answer is not proceed now, is the right conclusion wait, reframe the transaction, pursue a different route, or stop?

Evidence / owner / open issue

STATUS ☐ Ready ☐ Partial ☐ Not ready ☐ N/A

ACTION REGISTER

Priority decision or evidence gap	Next action	Owner	Review date

RECOMMENDATION☐ Proceed☐ Proceed with conditions☐ Reframe or wait☐ Stop