



THE SYSTEM CFO SERIES
HINDOL DATTA

FREE ASSESSMENT

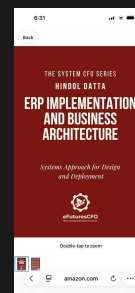
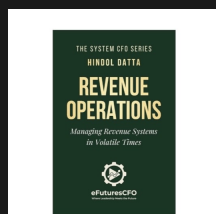
PILLAR 4: PLANNING & GROWTH STRATEGY | TOOLKIT #27 OF 37

THE POST-MERGER INTEGRATION FINANCE READINESS

*Ensuring Day-One Readiness and
100-Day Value Capture*

20-Question Diagnostic | 5-Page Assessment

Score Your Organization 1-5 Across Four Dimensions
Identify Gaps and Build Your Action Plan



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Where Leadership Meets the Future

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QUESTIONS 1-5

Section A: Pre-Close Financial Integration Planning

Have You Started Integration Planning — or Are You Waiting for the Deal to Close?

The organizations that capture the most value from acquisitions are the ones that begin integration planning before the deal closes. Financial integration cannot be an afterthought — the first 30 days set the trajectory for synergy realization, team retention, and cultural integration. The System CFO builds a detailed Day-1 readiness plan that ensures financial control, reporting capability, and cash visibility from the moment the deal closes.

A. PRE-CLOSE FINANCIAL INTEGRATION PLANNING

1	A Day-1 readiness checklist exists for finance — covering bank account access, payroll continuity, AP processing, cash reporting, insurance, tax registrations, and financial system	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
2	The integration team includes senior finance representation — a finance integration lead is assigned with dedicated capacity (not splitting time with their regular role) and clear	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
3	Clean room analysis has been completed for financial data — due diligence findings have been translated into specific integration actions, accounting policy differences have been	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
4	A 100-day integration plan exists with milestones — covering financial reporting consolidation, chart of accounts harmonization, system integration roadmap, and synergies	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
5	Communication plans address financial stakeholders — employees, customers, vendors, lenders, and investors receive timely, accurate information about financial integration,	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION A SCORE: Total: _____ / 25 Average: _____ / 5



QUESTIONS 6-10

Section B: Financial Systems and Reporting Integration

Can You Produce Consolidated Financial Statements — This Month?

Financial reporting integration is the most urgent priority after an acquisition closes. Investors, lenders, and the board need consolidated financial statements immediately. The System CFO ensures that reporting capability exists from Day 1 — even if it requires manual consolidation initially — and builds a roadmap for full system integration that balances speed with accuracy.

B. FINANCIAL SYSTEMS AND REPORTING INTEGRATION

6	An interim reporting process exists — the organization can produce consolidated financial statements within the first month of close, even before full system integration, using	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
7	Chart of accounts mapping has been completed — the acquired entity's accounts have been mapped to the parent's chart of accounts with clear rules for how each balance and transaction	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
8	Purchase accounting is planned and resourced — opening balance sheet adjustments, fair value allocations, goodwill calculations, and intangible asset valuations are planned with	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
9	System integration has a phased roadmap — the path from separate systems to integrated operations is planned with realistic timelines, resource requirements, and interim	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
10	Management reporting is harmonized — the acquired entity's KPIs and operational metrics are mapped to the parent's reporting framework so that combined business performance is	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION B SCORE: Total: ____ / 25 Average: ____ / 5



QUESTIONS 11-15

Section C: Synergy Tracking and Value Capture

Are You Tracking Synergies with the Same Rigor as the Deal Model Projected Them?

Most acquisitions fail to deliver their promised synergies because no one tracks them after the deal closes. The deal model projects cost savings and revenue synergies with spreadsheet precision, but post-close, these projections evaporate into general performance improvement claims. The System CFO builds a synergy tracking framework that holds the organization accountable for capturing the value that justified the acquisition price.

C. SYNERGY TRACKING AND VALUE CAPTURE

11	Synergies from the deal model are itemized and tracked — each projected cost saving and revenue synergy has a named owner, timeline, target amount, and monthly tracking against	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
12	Cost synergies are validated against actual spend — headcount reductions, vendor consolidation, facility rationalization, and other cost savings are verified through actual financial	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
13	Revenue synergies are measured rigorously — cross-sell, up-sell, and new market revenue attributed to the acquisition is tracked separately from organic growth of the combined entity.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
14	Integration costs are tracked against budget — the total cost of integration (severance, system migration, rebranding, consulting fees) is monitored to ensure the net synerg value	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
15	A synergy realization report goes to the board quarterly — showing progress against the deal model projections, explaining variances, and identifying risks to full synergy	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION C SCORE: Total: ____ / 25 Average: ____ / 5



QUESTIONS 16-20

Section D: People Integration and Cultural Alignment

Are You Retaining the Talent and Culture That Made the Acquisition Valuable?

Financial integration does not happen in spreadsheets — it happens through people. The finance team members of the acquired entity hold critical knowledge about their operations, relationships with vendors and customers, and institutional memory about why things work the way they do. The System CFO protects this human capital as fiercely as any financial asset, ensuring that key talent is retained and cultural integration is managed thoughtfully.

D. PEOPLE INTEGRATION AND CULTURAL ALIGNMENT

16	Key finance talent in the acquired entity is identified and retention plans are in place — critical knowledge holders have been mapped, retention packages have been structured, and	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
17	Roles and reporting structures are communicated quickly — organizational uncertainty is minimized by clarifying who reports to whom, which roles are changing, and which are	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
18	Process and policy differences are identified and resolved thoughtfully — accounting policies, approval authorities, expense policies, and operational procedures are harmonized	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
19	Cultural integration is planned, not assumed — differences in decision-making style, communication norms, risk tolerance, and operational philosophy between the two finance	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
20	Knowledge transfer from the acquired entity is documented — critical institutional knowledge about systems, processes, relationships, and history is captured in written form, not	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION D SCORE: Total: ____ / 25 Average: ____ / 5

OVERALL ASSESSMENT SCORE
 Section A: ____ / 25 Section B: ____ / 25 Section C: ____ / 25 Section D: ____ / 25 TOTAL: ____ / 100 AVG: ____ / 5

GAP TO GOAL

Gap-to-Goal Action Plan

Bridging the Gap — Post-Merger Integration Finance Readiness Diagnostic

Transfer your five lowest-scoring questions. For each gap, define the target state, specific actions, owner, timeline, and success metric. Focus on highest-impact gaps first.

GAP #	Q REF	CURRENT	TARGET	SPECIFIC ACTION TO CLOSE GAP	OWNER	DEADLINE	METRIC
1	Q__	___/5	___/5	_____	_____	_____	_____
2	Q__	___/5	___/5	_____	_____	_____	_____
3	Q__	___/5	___/5	_____	_____	_____	_____
4	Q__	___/5	___/5	_____	_____	_____	_____
5	Q__	___/5	___/5	_____	_____	_____	_____

ASSESSMENT SUMMARY

Completed by: _____ Date: _____

Overall average score: ___ / 5 Items scored 1-2 (critical): ___

Items scored 3 (developing): ___ Items scored 4-5 (strong): ___

Top strength: _____

Most critical gap: _____

One action this week: _____

READY TO GO DEEPER?

This free assessment identified your gaps. The Premium System CFO Toolkits provide the frameworks, templates, and action plans to close them. Visit EfuturesCFO.com





READY TO GO DEEPER?

This Assessment Identified the Gaps. The Premium Toolkit Closes Them.

PREMIUM: The First 90 Days: Systems CFO Diagnostic (14 Pages)

The full premium toolkit includes the comprehensive first 90 days assessment framework with week-by-week integration milestones, stakeholder mapping, system evaluation protocols, team capability assessment, and the complete transformation roadmap applicable to both new-role transitions and post-merger integration scenarios.

Plus. Access the Super Exclusive 40-Page

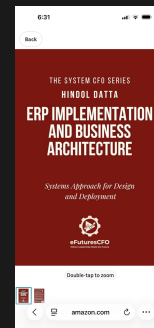
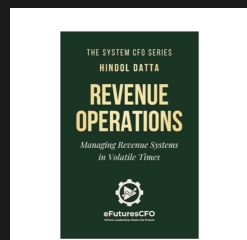
System CFO Organizational Finance Assessment Kit

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