



Agency Operational Readiness Package

**Buyer-Grade Operations. Diligence-Ready Documentation.
Built for Sustainable Growth.**

PCI's Operational Readiness Package provides structured, fixed-scope support to maximize value and reduce risk during acquisitions or growth phases. We build the operational foundation you need to scale with confidence.

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Most advisory work only addresses one component or challenge at a time. This is a comprehensive, evidence-driven engagement that integrates finance, operations, and technology into a single, defensible framework. Our approach ensures your agency is prepared for diligent review while delivering day-one improvements to your business—whether or not a transaction occurs.

If you need confidence in your numbers, operational clarity, and credibility with buyers or boards, this package is built specifically to support your goals.

By project completion, you'll achieve:

- Confidence in your financials and operations
- Clarity on how work flows across your business
- Reduced risk in operations and transaction readiness
- Enhanced credibility with buyers, boards, and investors
- A focused plan to drive margins, utilization, and scale
- Operational maturity is essential—let's build your foundation with confidence.



KICKOFF & GOAL ALIGNMENT

Define objectives, scope, and clear success metrics.



FINANCE & KPI READINESS (LITE)

Deliver transparency with buyer-grade financials and executive KPIs.



OPERATIONS BASELINE & SOP STARTER

Document critical workflows, standardize processes, and establish operational stability.



FOUNDATIONAL TECH STACH REVIEW

Clarify systems, integrations, and opportunities for data consolidation.



RED FLAG REPORT

Identify and prioritize operational and financial risks, assigning ownership and remediation pathways.



90 DAY IMPROVEMENT PLAN & EXECUTIVE REPORT

A practical, board-ready roadmap for action.

