

# Technology Diligence & Value Creation Service Catalog for Private Equity Leaders

*From IT Audit to Capital Efficiency Architecture*

**AlphaStratz reframes diligence as Capital Efficiency Architecture—linking technical realities to investor outcomes: EBITDA lift, multiple expansion, and risk-adjusted returns.**

## 1) Buy-and-Build Platform Integration Assessments

### **Entry — Integration Feasibility Checkpoint (≈2 weeks; \$75,000)**

- Go/no-go on absorbing bolt-ons; high-level scalability/API/data-model review.
- Concise recommendation; fee credited to Core.

### **Core — Scalable Platform Assessment (≈4 weeks; \$95,000–\$135,000)**

- Deep API/data-model/team assessment; Integration Readiness Scorecard.
- 100-day integration prep; pro-forma bolt-on cost model; 6-slide IC summary.

### **Expansion — Ongoing Bolt-On Partnership (≈2 weeks/target; \$45,000–\$85,000)**

- Standardized playbook; rapid complexity scoring; 100-day plan per add-on.

## 2) Carve-Out & Separation Assessments

### **Entry — Separation Feasibility Checkpoint (≈10 days; \$65,000)**

- Dependency mapping; preliminary complexity, ROM cost/timeline; exec go/no-go.

### **Core — Separation Architecture & Budget (≈4 weeks; \$105,000–\$155,000)**

- What stays/goes/new; verified OTC + standalone OpEx; 100-day mobilization.
- IC summary with escrows/indemnities guidance; proven large-scale execution.

### **Expansion — Separation Program Implementation (12–24 months; \$200,000–\$400,000)**

- Fractional leadership; weekly reporting; TSA exit planning; vendor negotiations.

## 3) SaaS & Subscription Retention Analytics

### **Entry — Retention Health Check (≈1 week; \$10,000)**

- Subset Markov analysis; mini-report vs claimed retention; scenario impact; creditable.

### **Core — Retention Analytics & Forecast (≈4–6 weeks; \$35,000–\$65,000)**

- Transition matrices, 3-year projections; valuation sensitivity; NRR actions.

### **Expansion — Improvement & Monitoring (12-week sprint; ~\$5,000/mo monitoring)**

- Pilot CS enhancements; monthly dashboard; quarterly refresh; standing advisory.

## 4) 100-Day Value Creation Sprints

### **Entry — Workshop (2 hours; Free) or 1-Week Diagnostic (~\$10,000)**

- Workshop memo with 3–5 initiatives; or quick function diagnostic with quick wins.

### **Core — 100-Day Sprint (≈12–14 weeks; \$45,000–\$75,000)**

- Baseline → execution → Impact Report; Implementation Playbook; weekly cadence.

### **Expansion — Retainer & Multi-Company Programs (scope-based)**

- On-call CTO/advisory; themed waves across portcos (cyber, cloud, etc.).

## **Technology Diligence & Value Creation Service Catalog for Private Equity Leaders - cont'd.**

### **5) AI Governance & Risk Assessments**

Entry — AI Risk Awareness Workshop (1–2 hours; Free–\$5,000)

- AI Governance 101; inventory & risk heatmap; one-page summary.

Core — AI Governance Diligence & Gap Analysis (~4–6 weeks; \$55,000–\$85,000)

- Model inventory/docs; compliance; bias testing; security; quantified risk; roadmap.

Expansion — Board Advisory & Implementation (3–6 months; ongoing)

- Policies, testing, monitoring; quarterly audits; board assurance.

**Next Steps — Book a no-risk entry session this week; memo delivered within 5 business days.**

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