Small Business Research Institute

Acquisition evidence tracker

Turn a buyer question into a specific evidence request, keep its source and limits visible, and assign the follow-up.

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Keep the request and the conclusion separate

Record information you are permitted to request and use. Identify who supplied it, its date and its limits. Receiving a document does not verify the claim it concerns. Ask the appropriate specialist to evaluate records within an agreed scope; use the tracker to coordinate that work.

Fictional completed example

Buyer question. Fictional example: can a manager cover day-to-day operations without the owner?

Request and permission. Through the agreed seller contact, request a redacted responsibility chart and an authorized discussion of a recent absence. No employee contact has been authorized.

Source and status. A draft chart was received. It lists responsibilities but does not establish capacity, availability or authority. Status: needs clarification.

Interpretation and limits. Management coverage remains unverified. The buyer needs operating evidence and appropriate specialist input before drawing a conclusion.

Follow-up. Buyer lead asks the seller contact which safe evidence or discussion can address the gap.

Your evidence request

Copy this page for each material question. Use a business alias and controlled document references. Do not store confidential seller information in this template.

Business alias and question

Why this question matters to the buyer

Specific record or conversation requested

Source custodian and record date

Permission and restrictions on use

Status and what was actually received

Limitations and questions still open

Responsible person and follow-up date

Review the evidence requests

Use this index to review outstanding requests. Keep the detailed record with its supporting source reference.

Question or request	Current status	Next step	Person and date

Discuss with the appropriate specialist

Which specialist and agreed scope are needed

Which assumptions could change the search or terms

What remains unresolved before the next commitment

Use the record

Connect each evidence request to a criterion, assumption or transition question in the buyer search brief. This tracker does not replace due diligence, valuation, legal advice or a lending decision.

Acquisition criteria guide
https://smbri.org/guides/acquisition-criteria

Acquisition tracker online
https://smbri.org/tools/acquisition-evidence

Use this educational workbook for planning and professional conversations. It does not establish legal rights, validate a business, confer a credential or replace qualified advice.