WORKSHEET / TOOL 08

Use this book with a portfolio company

Type into the fields or print a copy for your next working session.

01 Before the conversation

Independently choose a play for the current constraint. Have the founder answer its three investor questions.

02 During the conversation

Take one question at a time. Where evidence is weak, identify the assumption the company needs to test.

03 At the end

Agree one action, one owner, a date and evidence of progress. Link any introduction to that action.

04 At the next review

Revisit the same three questions. What changed? Agree which lessons may be shared and with whom.

Decision record

Owner

Agreed on

Review date

Evidence that would change the decision