

Paid Proof Sprint Worksheet

Pairs with: Paid proof before polish

Define a paid pilot, price it, scope it, and decide what evidence will count.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use this when you need to move from encouraging conversations to evidence that someone will pay.

What this worksheet covers

| | |
|--------------------------|------------------------|
| Problem worth paying for | Buyer and budget owner |
| Pilot scope | Success criteria |
| Price and decision date | Evidence review |

Questions to answer before you start

What exact problem will the buyer pay to solve now?

Who owns the budget and who can approve the pilot?

What is included, excluded, and time-boxed?

What evidence would prove this should continue?

What price will you test and what decision date will you set?

What did the pilot prove about urgency, margin, repeatability, and next step?

Paid proof sprint definition

| Field | Your answer |
|-------------------------------------|-------------|
| Buyer segment | <hr/> <hr/> |
| Named prospect or account | <hr/> <hr/> |
| Problem statement | <hr/> <hr/> |
| Outcome promised | <hr/> <hr/> |
| Pilot length | <hr/> <hr/> |
| Pilot price | <hr/> <hr/> |
| Decision date | <hr/> <hr/> |
| Success metric | <hr/> <hr/> |
| Delivery owner | <hr/> <hr/> |
| What happens after the pilot | <hr/> <hr/> |

Evidence review

| Question | Evidence collected | Decision |
|---|--------------------|----------------|
| Did the buyer pay? | _____ _____ | _____ _____ |
| Did the buyer give access to the right people/data? | _____ _____ | _____ _____ |
| Did delivery stay inside scope? | _____ _____ | _____ _____ |
| Did the outcome matter enough? | _____ _____ | _____ _____ |
| Can this be repeated with similar buyers? | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Demand Signal Scorecard

Pairs with: Interest is not demand

Separate polite interest from real buying behaviour.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use this after every discovery conversation to score whether the buyer is moving or only being polite.

What this worksheet covers

| | |
|-------------------|----------------|
| Weak signals | Medium signals |
| Strong signals | Buyer action |
| Next step quality | Exit criteria |

Questions to answer before you start

| | |
|---|---|
| <p>What did the buyer actually do, not just say?</p> <p>_____</p> <p>_____</p> <p>_____</p> | <p>Is there a budget owner, deadline, data access, or internal action?</p> <p>_____</p> <p>_____</p> <p>_____</p> |
| <p>What specific next step did they commit to?</p> <p>_____</p> <p>_____</p> <p>_____</p> | <p>What would make you exit this opportunity cleanly?</p> <p>_____</p> <p>_____</p> <p>_____</p> |

Signal ladder

| Signal type | What happened | Score 0-3 | Evidence |
|--|----------------|----------------|----------------|
| Compliment or curiosity | _____ _____ | _____ _____ | _____ _____ |
| Problem acknowledged | _____ _____ | _____ _____ | _____ _____ |
| Introduced another stakeholder | _____ _____ | _____ _____ | _____ _____ |
| Shared data or process detail | _____ _____ | _____ _____ | _____ _____ |
| Named budget route | _____ _____ | _____ _____ | _____ _____ |
| Agreed next meeting with decision maker | _____ _____ | _____ _____ | _____ _____ |
| Accepted price discussion | _____ _____ | _____ _____ | _____ _____ |
| Started legal/security/procurement step | _____ _____ | _____ _____ | _____ _____ |

Conversation decision

| Decision option | Criteria | Your call |
|---|----------------|----------------|
| Continue | _____ _____ | _____ _____ |
| Strong signal and dated next step | _____ _____ | _____ _____ |
| Nurture | _____ _____ | _____ _____ |
| Some pain but no action yet | _____ _____ | _____ _____ |
| Reframe | _____ _____ | _____ _____ |
| Wrong buyer or weak trigger | _____ _____ | _____ _____ |
| Exit | _____ _____ | _____ _____ |
| No budget, owner, urgency, or action | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Earn the Right to Banks Readiness Map

Pairs with: Earn the right to banks

Decide whether a bank conversation is learning, sales, partnership, or distraction.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use this before treating a bank conversation as a real sales opportunity.

What this worksheet covers

| | |
|------------------|------------------|
| Current proof | Stakeholders |
| Evidence gaps | Procurement path |
| Sponsor strength | Readiness rating |

Questions to answer before you start

What proof do you already have outside the bank?

Who owns the business problem inside the bank?

What would fail vendor review today?

What is the path from learning to paid pilot?

Are you ready to enter the bank process, or should this stay as learning?

Bank readiness map

| Area | Current position | Gap | Next action |
|----------------------------|------------------|-------------|-------------|
| Revenue proof | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Relevant references | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Security and data evidence | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Operational resilience | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Implementation plan | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Internal sponsor | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Budget owner | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Procurement path | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Exit criteria | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |

Readiness rating

| Rating | Meaning | Your evidence |
|--|---------|---------------|
| Red | _____ | _____ |
| Learning only. No clear route to budget or evidence pack is weak. | _____ | _____ |
| Amber | _____ | _____ |
| Potential opportunity. Key gaps still need closing. | _____ | _____ |
| Green | _____ | _____ |
| Ready to pursue. Sponsor, budget path, proof, and evidence are clear. | _____ | _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Bank-Ready Evidence Pack Checklist

Pairs with: Build the evidence pack before anyone asks

Cover the material buyers need to feel safe moving forward.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use this before entering regulated-buyer conversations or when procurement, risk, security, legal, finance, or compliance appear.

What this worksheet covers

| | |
|------------|-----------------|
| Security | Data protection |
| Resilience | Insurance |
| Policies | Implementation |
| Support | Exit plan |

Questions to answer before you start

| | |
|---|--|
| Which documents already exist? _____ _____ _____ | Which answers are not ready yet? _____ _____ _____ |
| Which gaps are acceptable if you explain the plan? _____ _____ _____ | What must be complete before go-live? _____ _____ _____ |

Evidence pack status

| Evidence area | Document or answer needed | Status | Owner | Next action |
|------------------------------------|---------------------------|--------|-------|-------------|
| Security overview | _____ _____ | _____ | _____ | _____ |
| Data protection summary | _____ _____ | _____ | _____ | _____ |
| Data flow diagram | _____ _____ | _____ | _____ | _____ |
| Access control summary | _____ _____ | _____ | _____ | _____ |
| Incident response process | _____ _____ | _____ | _____ | _____ |
| Operational resilience note | _____ _____ | _____ | _____ | _____ |
| Insurance certificate | _____ _____ | _____ | _____ | _____ |
| Information security policy | _____ _____ | _____ | _____ | _____ |
| Privacy policy | _____ _____ | _____ | _____ | _____ |
| Implementation plan | _____ _____ | _____ | _____ | _____ |
| Support model | _____ _____ | _____ | _____ | _____ |
| Exit or offboarding plan | _____ _____ | _____ | _____ | _____ |

Buyer-facing risk summary

| Risk question | Plain-English answer | Evidence link or owner |
|------------------------------------|----------------------|------------------------|
| What data do you access? | _____ _____ | _____ _____ |
| Where is data stored? | _____ _____ | _____ _____ |
| Who can access it? | _____ _____ | _____ _____ |
| What happens if the service fails? | _____ _____ | _____ _____ |
| How does the buyer exit safely? | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Procurement Readiness Checklist

Pairs with: Treat procurement as part of the sale

Prepare for legal, risk, security, finance, and procurement review.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use when a sponsor says yes but the organisation still needs confidence to buy.

What this worksheet covers

| | |
|-------------------|-----------------------|
| Buying process | Approval thresholds |
| Risk stakeholders | Standard documents |
| Commercial terms | Internal sponsor pack |

Questions to answer before you start

| | |
|--|--|
| What is the real buying process? _____ _____ _____ | What approval threshold does the price trigger? _____ _____ _____ |
| Which stakeholders can slow or stop the deal? _____ _____ _____ | What does the sponsor need to sell this internally? _____ _____ _____ |

Procurement path

| Step | Who owns it | What they need | Status | Date |
|---------------------------------|----------------|----------------|----------------|----------------|
| Business case approval | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Budget approval | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Legal review | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Security review | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Data protection review | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Risk/compliance review | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Procurement/vendor setup | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Contract signature | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Implementation approval | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Champion pack

| Item | Ready? | Gap to close |
|------------------------------|----------------|----------------|
| One-page value narrative | _____ _____ | _____ _____ |
| Cost of inaction | _____ _____ | _____ _____ |
| Risk summary | _____ _____ | _____ _____ |
| Implementation plan | _____ _____ | _____ _____ |
| Commercial proposal | _____ _____ | _____ _____ |
| Procurement FAQ | _____ _____ | _____ _____ |
| Decision-ready meeting recap | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Stakeholder and Buyer Map

Pairs with: Know the buyer, not just the user

Map users, buyers, budget holders, blockers, sponsors, and approvers.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it
Use this when user enthusiasm is not converting into a buying path.

What this worksheet covers

| | |
|---------------|--------------------|
| User pain | Economic buyer |
| Budget holder | Technical approver |
| Risk approver | Executive sponsor |

Questions to answer before you start

Who feels the pain?

Who owns the budget?

Who accepts the risk?

Who can block the deal?

What language helps each stakeholder care?

Stakeholder map

| Role | Name/team | What they care about | Influence | Next step |
|---------------------------------|----------------|----------------------|----------------|----------------|
| Daily user | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Manager of user team | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Economic buyer | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Budget holder | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Technical approver | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Risk/compliance approver | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Procurement contact | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Executive sponsor | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Internal blocker | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Value translation

| User problem | Business impact | Executive language |
|-----------------------------|-----------------|--------------------|
| Manual work | _____ _____ | _____ _____ |
| Risk or compliance exposure | _____ _____ | _____ _____ |
| Customer impact | _____ _____ | _____ _____ |
| Revenue or cost impact | _____ _____ | _____ _____ |
| Operational resilience | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Enterprise Conversation Qualification Sheet

Pairs with: Innovation teams are useful, but they are not always buyers

Decide whether an exploratory innovation conversation has a real route to revenue.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use after an enterprise innovation meeting to decide whether to continue, exit, or change shape.

What this worksheet covers

| | |
|----------------------|-----------------------------|
| Path to budget | Business owner identified |
| Implementation route | Conditions for a paid pilot |
| Stop rule | |

Questions to answer before you start

| | |
|---|---|
| Who would own this if it became real? _____ _____ _____ | What is the path to budget? _____ _____ _____ |
| What proof would move this out of exploration? _____ _____ _____ | What is the stop rule after repeated meetings? _____ _____ _____ |

Qualification sheet

| Question | Answer | Confidence 1-5 |
|---|-------------|----------------|
| Who owns the business problem? | <hr/> <hr/> | <hr/> <hr/> |
| Who controls budget? | <hr/> <hr/> | <hr/> <hr/> |
| What trigger makes this urgent? | <hr/> <hr/> | <hr/> <hr/> |
| What paid pilot conditions were discussed? | <hr/> <hr/> | <hr/> <hr/> |
| What implementation route exists? | <hr/> <hr/> | <hr/> <hr/> |
| What internal proof is needed? | <hr/> <hr/> | <hr/> <hr/> |
| What date will the path be clear? | <hr/> <hr/> | <hr/> <hr/> |

Continue or exit

| Option | Use when | Your decision |
|--|----------------|----------------|
| Continue | _____ _____ | _____ _____ |
| Buyer, budget path, and dated next step exist | _____ _____ | _____ _____ |
| Reframe | _____ _____ | _____ _____ |
| Need access to business owner or clearer use case | _____ _____ | _____ _____ |
| Exit | _____ _____ | _____ _____ |
| No budget path after agreed number of meetings | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Pricing Test Planner

Pairs with: Pricing is part of discovery

Test whether price, value, and urgency are aligned.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use when free conversations are hiding whether the buyer values the problem enough.

What this worksheet covers

| | |
|--------------------|-----------------|
| Value hypothesis | Pricing anchor |
| Approval threshold | Objection log |
| Margin check | Next price test |

Questions to answer before you start

| | |
|--|--|
| What outcome are you pricing? _____ _____ _____ | What price will you test? _____ _____ _____ |
| What approval threshold does the price trigger? _____ _____ _____ | What objection did the buyer raise and what did it teach you? _____ _____ _____ |

Price test

| Element | Your answer |
|---------------------------|-------------|
| Buyer segment | <hr/> <hr/> |
| Problem/outcome | <hr/> <hr/> |
| Value hypothesis | <hr/> <hr/> |
| Test price | <hr/> <hr/> |
| Pilot price | <hr/> <hr/> |
| Rollout price | <hr/> <hr/> |
| Approval threshold | <hr/> <hr/> |
| What is included | <hr/> <hr/> |
| What is excluded | <hr/> <hr/> |
| Decision date | <hr/> <hr/> |

Objection log

| Objection | Type | What it means | Action |
|---------------------------|----------------|----------------|----------------|
| Too expensive | _____ _____ | _____ _____ | _____ _____ |
| No budget | _____ _____ | _____ _____ | _____ _____ |
| Need business case | _____ _____ | _____ _____ | _____ _____ |
| Need more proof | _____ _____ | _____ _____ | _____ _____ |
| Timing not right | _____ _____ | _____ _____ | _____ _____ |
| Risk concern | _____ _____ | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Gross Margin Reality Check

Pairs with: Gross margin is a day-one habit

Understand the real cost of delivering early customers.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use after each early customer or pilot to see whether revenue is hiding manual effort.

What this worksheet covers

| | |
|-----------------------|------------------|
| Setup effort | Support effort |
| Founder time | Technical effort |
| Gross margin estimate | Scale risk |

Questions to answer before you start

| | |
|---|--|
| How much time did delivery really take? _____ _____ _____ | Which effort was one-off and which repeats? _____ _____ _____ |
| What should be automated, documented, removed, or priced higher? _____ _____ _____ | Is this customer type worth repeating? _____ _____ _____ |

Delivery effort log

| Activity | Hours | Cost rate | Cost | Repeat or one-off |
|---------------------------------|-------------|-------------|-------------|-------------------|
| Sales handover | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Setup/onboarding | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Data or integration work | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Founder calls | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Support | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Customer success | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Technical fixes | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Custom reporting | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| Admin/procurement | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |

Margin reality check

| Metric | Amount or answer |
|-----------------------------|------------------|
| Revenue from customer/pilot | _____ _____ |
| Total delivery cost | _____ _____ |
| Estimated gross margin | _____ _____ |
| Hidden founder time | _____ _____ |
| Tasks to automate | _____ _____ |
| Tasks to document | _____ _____ |
| Scale risk rating | _____ _____ |
| Repeat this customer type? | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Commercial Experiment Log

Pairs with: Shorten time to proof

Test one commercial assumption at a time.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it
Use when experiments are too broad, too long, or unable to drive a decision.

What this worksheet covers

| | |
|------------------|--------------------|
| Assumption | Experiment design |
| Success criteria | Evidence collected |
| Decision | Next action |

Questions to answer before you start

| | |
|---|--|
| What is the riskiest assumption? _____ _____ _____ | What is the smallest honest test? _____ _____ _____ |
| What evidence would change the decision? _____ _____ _____ | What will you stop, adapt, or double down on? _____ _____ _____ |

Experiment card

| Field | Your answer |
|--------------------|-------------|
| Assumption to test | <hr/> <hr/> |
| Why it matters | <hr/> <hr/> |
| Buyer segment | <hr/> <hr/> |
| Test design | <hr/> <hr/> |
| Start date | <hr/> <hr/> |
| End date | <hr/> <hr/> |
| Success criteria | <hr/> <hr/> |
| Evidence source | <hr/> <hr/> |
| Decision owner | <hr/> <hr/> |
| Stop rule | <hr/> <hr/> |

Evidence and decision log

| Evidence collected | Interpretation | Decision | Next action |
|--------------------------|----------------|----------------|----------------|
| Buyer response | _____ _____ | _____ _____ | _____ _____ |
| Buyer action | _____ _____ | _____ _____ | _____ _____ |
| Objection pattern | _____ _____ | _____ _____ | _____ _____ |
| Pricing signal | _____ _____ | _____ _____ | _____ _____ |
| Delivery signal | _____ _____ | _____ _____ | _____ _____ |
| Learning to reuse | _____ _____ | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Founder Sales Operating Rhythm

Pairs with: Founder-led sales is not optional

A weekly cadence for staying close to early sales without losing operational control.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it
Use when the founder needs to lead market learning, pricing, objections, and early pipeline quality.

What this worksheet covers

| | |
|------------------|-----------------|
| Pipeline review | Learning review |
| Objection review | Message update |
| Next actions | Decision gates |

Questions to answer before you start

What did you learn from buyers this week?

Which objections repeated?

Which message changed?

Which deals need founder involvement?

What decision gate is next?

Weekly founder sales rhythm

| Block | Question | Output |
|--|-------------|-------------|
| Pipeline review | <hr/> <hr/> | <hr/> <hr/> |
| Which opportunities moved because of buyer action? | <hr/> <hr/> | <hr/> <hr/> |
| Updated pipeline quality | <hr/> <hr/> | <hr/> <hr/> |
| Learning review | <hr/> <hr/> | <hr/> <hr/> |
| What exact buyer language did you hear? | <hr/> <hr/> | <hr/> <hr/> |
| Message notes | <hr/> <hr/> | <hr/> <hr/> |
| Objection review | <hr/> <hr/> | <hr/> <hr/> |
| What stopped progress? | <hr/> <hr/> | <hr/> <hr/> |
| Objection patterns | <hr/> <hr/> | <hr/> <hr/> |
| Message update | <hr/> <hr/> | <hr/> <hr/> |
| What wording needs to change? | <hr/> <hr/> | <hr/> <hr/> |
| Updated narrative | <hr/> <hr/> | <hr/> <hr/> |
| Next actions | <hr/> <hr/> | <hr/> <hr/> |
| What must happen before next week? | <hr/> <hr/> | <hr/> <hr/> |

| Block | Question | Output |
|--|----------------|----------------|
| Owner and date | _____ _____ | _____ _____ |
| Decision gate | _____ _____ | _____ _____ |
| What will you stop, adapt, or double down on? | _____ _____ | _____ _____ |
| Decision | _____ _____ | _____ _____ |

Deal focus list

| Opportunity | Stage | Buyer action needed | Founder action | Date |
|---------------|----------------|---------------------|----------------|----------------|
| Deal 1 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Deal 2 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Deal 3 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Deal 4 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Deal 5 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
| <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
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Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Trigger Map and Outreach Planner

Pairs with: Map the trigger, not just the pain

Identify the events that create buyer urgency.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

| |
|---|
| When to use it Use when buyers understand the pain but do not move. |
|---|

What this worksheet covers

| | |
|---------------|-----------------|
| Trigger type | Buyer role |
| Pain created | Timing |
| Message angle | Outreach action |

Questions to answer before you start

What changed recently for the buyer?

What date matters?

Who is measured on the outcome?

What trigger should shape your message?

What action do you want the buyer to take?

Trigger library

| Trigger type | Buyer role | Pain created | Timing | Message angle | Outreach action |
|------------------------|----------------|----------------|----------------|----------------|-----------------|
| Regulatory date | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Audit finding | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Failed project | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Cost pressure | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| New leader | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Customer harm | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Competitor move | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Board priority | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Budget cycle | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Outreach plan

| Target account | Trigger observed | Message angle | Ask | Next step date |
|------------------|------------------|----------------|----------------|----------------|
| Account 1 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Account 2 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Account 3 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Account 4 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Account 5 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

First Three Reference Customers Worksheet

Pairs with: References beat vision

Choose early customers that can produce proof, learning, and credible references.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use when deciding which early customers to pursue, especially when credibility matters more than logo value.

What this worksheet covers

| | |
|-----------------|---------------------|
| Reference fit | Use case clarity |
| Success measure | Implementation risk |
| Permission path | Proof asset |

Questions to answer before you start

| | |
|--|--|
| <p>Which customer would make the proof more credible?</p> <p>_____</p> <p>_____</p> <p>_____</p> | <p>Can success be measured clearly?</p> <p>_____</p> <p>_____</p> <p>_____</p> |
| <p>Will the buyer permit private or public reference use?</p> <p>_____</p> <p>_____</p> <p>_____</p> | <p>What proof asset can be created?</p> <p>_____</p> <p>_____</p> <p>_____</p> |

Reference customer comparison

| Candidate | Reference fit | Use case clarity | Success measure | Implementation risk | Permission path | Proof asset | Score |
|------------|----------------|------------------|-----------------|---------------------|-----------------|----------------|----------------|
| Customer 1 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Customer 2 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Customer 3 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Customer 4 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Customer 5 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Reference ladder

| Level | What permission means | Candidate |
|------------------------|-----------------------|----------------|
| Private reference call | _____ _____ | _____ _____ |
| Anonymised quote | _____ _____ | _____ _____ |
| Anonymised case study | _____ _____ | _____ _____ |
| Named case study | _____ _____ | _____ _____ |
| Public story | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
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Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

First Three Markets Worksheet

Pairs with: Choose your first three markets deliberately

Compare markets by speed, learning, regulation, access, and reference value.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use when choosing the first market, second market, or next international expansion path.

What this worksheet covers

| | |
|-----------------|------------------------|
| Market pain | Buyer access |
| Budget route | Regulatory burden |
| Reference value | Operational complexity |

Questions to answer before you start

| | |
|---|--|
| Which market creates the fastest honest proof? _____ _____ _____ | Which market teaches something that travels? _____ _____ _____ |
| Which market creates the strongest reference? _____ _____ _____ | Which market adds too much complexity too soon? _____ _____ _____ |

Market comparison

| Market | Pain | Buyer access | Budget route | Regulation | Reference value | Operational complexity | Total |
|----------|----------------|----------------|----------------|----------------|-----------------|------------------------|----------------|
| Market 1 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Market 2 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Market 3 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Market 4 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Market 5 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Sequence decision

| Position | Chosen market | Why now | Evidence needed to move next |
|--------------------------|----------------|----------------|------------------------------|
| Primary market | _____ _____ | _____ _____ | _____ _____ |
| Adjacent market | _____ _____ | _____ _____ | _____ _____ |
| Future market to monitor | _____ _____ | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
| <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
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Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Market Portability Checklist

Pairs with: Think global before you build local too deeply

Understand whether the proposition can travel beyond the first market.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use before hard-coding product, pricing, evidence, compliance, or sales decisions around one local market.

What this worksheet covers

| | |
|----------------|------------------------|
| Universal pain | Local assumptions |
| Data access | Compliance differences |
| Support model | Sales motion |

Questions to answer before you start

| | |
|---|--|
| What is universal and what is local? _____ _____ _____ | Which assumptions will break in another market? _____ _____ _____ |
| What proof language can travel? _____ _____ _____ | What should stay configurable? _____ _____ _____ |

Portability checklist

| Area | Local assumption | Will it travel? | Change needed |
|-------------------------------|------------------|-----------------|----------------|
| Problem/pain | _____ _____ | _____ _____ | _____ _____ |
| Buyer role | _____ _____ | _____ _____ | _____ _____ |
| Budget owner | _____ _____ | _____ _____ | _____ _____ |
| Data access | _____ _____ | _____ _____ | _____ _____ |
| Compliance requirement | _____ _____ | _____ _____ | _____ _____ |
| Procurement process | _____ _____ | _____ _____ | _____ _____ |
| Support model | _____ _____ | _____ _____ | _____ _____ |
| Pricing model | _____ _____ | _____ _____ | _____ _____ |
| Sales motion | _____ _____ | _____ _____ | _____ _____ |
| Reference language | _____ _____ | _____ _____ | _____ _____ |

Future-market learning

| Market | Question to test now | Who to ask | Evidence needed |
|-----------------|----------------------|----------------|-----------------|
| Market 1 | _____ _____ | _____ _____ | _____ _____ |
| Market 2 | _____ _____ | _____ _____ | _____ _____ |
| Market 3 | _____ _____ | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
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Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Investment Evidence Plan

Pairs with: Raise for evidence, not relief

Link capital raised to evidence created.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use before fundraising or when the raise risks becoming a way to delay hard commercial decisions.

What this worksheet covers

| | |
|-----------------------|--------------------|
| Use of funds | Evidence milestone |
| Commercial hypothesis | Hiring logic |
| Runway scenarios | Decision point |

Questions to answer before you start

| | |
|---|--|
| What will the money prove? _____ _____ _____ | Which commercial hypothesis will be tested? _____ _____ _____ |
| Which milestone unlocks the next decision? _____ _____ _____ | What changes if the round is smaller? _____ _____ _____ |

Use of funds as evidence

| Spend area | Amount | Hypothesis tested | Evidence expected | Decision unlocked |
|----------------------------|--------|-------------------|-------------------|-------------------|
| Product | _____ | _____ | _____ | _____ |
| Sales/GTM | _____ | _____ | _____ | _____ |
| Customer success | _____ | _____ | _____ | _____ |
| Compliance/security | _____ | _____ | _____ | _____ |
| Marketing | _____ | _____ | _____ | _____ |
| Hiring | _____ | _____ | _____ | _____ |
| Operations | _____ | _____ | _____ | _____ |

Runway scenarios

| Scenario | Cash available | Months runway | Evidence milestone | Decision point |
|----------------------|----------------|---------------|--------------------|----------------|
| Base case | _____ | _____ | _____ | _____ |
| Stretch case | _____ | _____ | _____ | _____ |
| Survival case | _____ | _____ | _____ | _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
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Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Investor Conversation Tracker

Pairs with: Investor conversations are not customer validation

Separate investor feedback from customer evidence.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use during fundraising to keep sales activity and market evidence separate from investor opinion.

What this worksheet covers

| | |
|-------------------------|--------------------|
| Investor question | Evidence requested |
| Pattern across meetings | Customer relevance |
| Action | Follow-up |

Questions to answer before you start

| | |
|--|---|
| <p>What questions repeat across investors?</p> <hr/> <hr/> <hr/> | <p>Which proof requests are also relevant to customers?</p> <hr/> <hr/> <hr/> |
| <p>What feedback should not change the business yet?</p> <hr/> <hr/> <hr/> | <p>What evidence will you show next time?</p> <hr/> <hr/> <hr/> |

Investor feedback log

| Investor question | Evidence requested | Pattern? | Customer relevance | Action | Follow-up date |
|-------------------|--------------------|----------------|--------------------|----------------|----------------|
| Question 1 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Question 2 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Question 3 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Question 4 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Question 5 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Question 6 | _____ _____ | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Customer evidence comparison

| Investor theme | Customer evidence available | Gap | Action |
|-----------------|-----------------------------|----------------|----------------|
| Demand | _____ _____ | _____ _____ | _____ _____ |
| Pricing | _____ _____ | _____ _____ | _____ _____ |
| Sales cycle | _____ _____ | _____ _____ | _____ _____ |
| Retention | _____ _____ | _____ _____ | _____ _____ |
| Margin | _____ _____ | _____ _____ | _____ _____ |
| Risk/compliance | _____ _____ | _____ _____ | _____ _____ |
| Market size | _____ _____ | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
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Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Founder Risk and Runway Review

Pairs with: Runway pressure changes decision quality

Review runway, pressure, decision quality, and available options calmly.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use when fundraising, managing runway pressure, or deciding before options narrow.

What this worksheet covers

| | |
|-----------------|-------------------|
| Cash runway | Decision triggers |
| Pressure points | Options |
| No-regret moves | Support needed |

Questions to answer before you start

| | |
|--|---|
| <p>How much runway is left in base, stretch, and survival cases?</p> <hr/> <hr/> <hr/> | <p>What decisions must happen before pressure removes choice?</p> <hr/> <hr/> <hr/> |
| <p>Which moves are no-regret?</p> <hr/> <hr/> <hr/> | <p>Who should be involved before crisis mode?</p> <hr/> <hr/> <hr/> |

Runway review

| Metric | Base case | Stretch case | Survival case |
|------------------|----------------|----------------|----------------|
| Cash available | _____ _____ | _____ _____ | _____ _____ |
| Monthly burn | _____ _____ | _____ _____ | _____ _____ |
| Months runway | _____ _____ | _____ _____ | _____ _____ |
| Revenue expected | _____ _____ | _____ _____ | _____ _____ |
| Funding expected | _____ _____ | _____ _____ | _____ _____ |
| Decision date | _____ _____ | _____ _____ | _____ _____ |

Decision map

| Trigger | Decision required | Deadline | Owner | Support needed |
|----------------------|-------------------|----------------|----------------|----------------|
| Cash below threshold | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Deal slips | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Investor delay | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Key hire decision | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Cost reduction | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Strategic pivot | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
| <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Partner Fit Canvas

Pairs with: Partnerships need control, not just access

Structure a partnership around incentive, buyer, offer, owner, conversion path, and stop rule.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use when a relationship, introduction, programme, or partner could create leverage but needs commercial structure.

What this worksheet covers

| | |
|-------------------|--------------|
| Partner incentive | Target buyer |
| Joint offer | Owner |
| Conversion path | Stop rule |

Questions to answer before you start

Why would the partner act?

Who exactly are they helping you reach?

What is the joint offer?

Who owns conversion?

What is the stop rule?

Partner fit canvas

| Block | Answer |
|-------------------------|-------------|
| Partner name | <hr/> <hr/> |
| Partner incentive | <hr/> <hr/> |
| Target buyer | <hr/> <hr/> |
| Joint offer | <hr/> <hr/> |
| Who sells | <hr/> <hr/> |
| Who supports | <hr/> <hr/> |
| Commercial model | <hr/> <hr/> |
| First named opportunity | <hr/> <hr/> |
| Conversion path | <hr/> <hr/> |
| Review date | <hr/> <hr/> |
| Stop rule | <hr/> <hr/> |

Opportunity plan

| Target account | Partner role | Founder role | Next action | Date |
|------------------|----------------|----------------|----------------|----------------|
| Account 1 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Account 2 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Account 3 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Account 4 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Regulatory Position Note Template

Pairs with: Regulatory clarity is a commercial asset

Explain the regulatory position of the product in plain English.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use when buyers, partners, investors, or advisers need to understand what is safe to do.

What this worksheet covers

| | |
|-----------------------|---------------------|
| What the product does | What it does not do |
| Relevant permissions | Assumptions |
| Advice received | Open questions |

Questions to answer before you start

What does the product do in plain English?

What does it not do or claim?

Which permissions or obligations may apply?

What advice has been received?

What remains open?

Regulatory position note

| Section | Draft wording |
|------------------------------|---------------|
| Product summary | |
| What the product does | |
| What the product does not do | |
| Customer role | |
| Data role | |
| Relevant permissions | |
| Regulatory assumptions | |
| Advice received | |
| Open questions | |
| Buyer-safe explanation | |

Market difference check

| Market | Assumption | Advice needed | Owner |
|----------|------------|---------------|----------|
| Market 1 | | | |
| Market 2 | | | |
| Market 3 | | | |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
| <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
| <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |
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| <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> | <hr/> <hr/> |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

AI, Data, and Resilience Evidence Checklist

Pairs with: AI, data, and resilience are now buying conditions

Prepare assurance evidence for data-led, AI-enabled, or operationally important fintech products.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use before regulated-buyer conversations where AI, data, third-party dependencies, or operational resilience may create concern.

What this worksheet covers

| | |
|--------------------------|-----------------|
| Data permissions | Model behaviour |
| Human oversight | Testing |
| Monitoring | Resilience |
| Third-party dependencies | |

Questions to answer before you start

| | |
|---|--|
| <p>Where does data come from and what permissions apply?</p> <p>_____</p> <p>_____</p> <p>_____</p> | <p>How is model behaviour tested and monitored?</p> <p>_____</p> <p>_____</p> <p>_____</p> |
| <p>Where is human oversight required?</p> <p>_____</p> <p>_____</p> <p>_____</p> | <p>What happens when something fails?</p> <p>_____</p> <p>_____</p> <p>_____</p> |

Assurance checklist

| Area | Evidence needed | Status | Owner | Gap |
|------------------------------------|-----------------|----------------|----------------|----------------|
| Data source and permissions | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Data retention and deletion | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Model behaviour summary | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Human oversight process | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Exception handling | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Testing approach | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Monitoring approach | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Incident process | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Third-party dependencies | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Resilience and continuity | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Buyer-safe demo controls | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Risk explanation

| Buyer concern | Plain-English answer | Evidence link |
|-------------------------------------|----------------------|----------------|
| How outputs are controlled | _____ _____ | _____ _____ |
| How mistakes are handled | _____ _____ | _____ _____ |
| How the service fails safely | _____ _____ | _____ _____ |
| Who is accountable | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|----------------|----------------|---------------------------|----------------|
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Trust Signal Checklist

Pairs with: Trust is cumulative

Make small operating habits visible so buyers feel safer moving forward.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use before follow-up, procurement responses, or difficult buyer conversations.

What this worksheet covers

| | |
|-------------------------------------|------------------------------------|
| Promises kept small and precise | Useful evidence in every follow-up |
| Honest gap acknowledged with a plan | Plain-English risk language |
| Decision-ready meeting recap | |

Questions to answer before you start

| | |
|---|--|
| What promise did you make and can you keep it? _____ _____ _____ | What evidence will you include in the next follow-up? _____ _____ _____ |
| Which gap should be acknowledged honestly? _____ _____ _____ | How will you make the next decision easier for the buyer? _____ _____ _____ |

Trust signals

| Signal | Yes/No | Evidence or action |
|--|-------------|--------------------|
| Follow-up sent on time | <hr/> <hr/> | <hr/> <hr/> |
| Promise is specific and small | <hr/> <hr/> | <hr/> <hr/> |
| Buyer question answered plainly | <hr/> <hr/> | <hr/> <hr/> |
| Evidence attached or linked | <hr/> <hr/> | <hr/> <hr/> |
| Gap acknowledged with plan | <hr/> <hr/> | <hr/> <hr/> |
| Risk language is clear | <hr/> <hr/> | <hr/> <hr/> |
| Meeting recap includes decision and owner | <hr/> <hr/> | <hr/> <hr/> |
| Next step has date | <hr/> <hr/> | <hr/> <hr/> |
| No inflated claims | <hr/> <hr/> | <hr/> <hr/> |
| Buyer has less work to do | <hr/> <hr/> | <hr/> <hr/> |

Decision-ready recap

| Element | Draft |
|--------------------------|-------------|
| What we heard | <hr/> <hr/> |
| What matters now | <hr/> <hr/> |
| Evidence attached | <hr/> <hr/> |
| Open risk or gap | <hr/> <hr/> |
| Decision needed | <hr/> <hr/> |
| Owner and date | <hr/> <hr/> |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
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Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Founder Reality Review

Pairs with: Founder resilience is an operating capability

Bring private founder pressures into a calm monthly review.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use monthly, or when you feel reactive, isolated, or unsure which decision to face next.

What this worksheet covers

| | |
|-----------------------------------|------------------------|
| Founder red flag list | Decision being avoided |
| Pressure points | Trusted advisers |
| One commitment for the next month | |

Questions to answer before you start

Which pressures are affecting judgement?

What decision are you avoiding?

Which red flags are visible?

Who should help you think clearly?

What one commitment protects the company and you?

Founder red flag review

| Red flag | Present? | Evidence | Action |
|------------------------------|----------------|----------------|----------------|
| Sleep or energy drop | _____ _____ | _____ _____ | _____ _____ |
| Avoiding hard conversations | _____ _____ | _____ _____ | _____ _____ |
| Cash anxiety | _____ _____ | _____ _____ | _____ _____ |
| Communication drift | _____ _____ | _____ _____ | _____ _____ |
| Reactive decisions | _____ _____ | _____ _____ | _____ _____ |
| Shame or isolation | _____ _____ | _____ _____ | _____ _____ |
| Overworking without progress | _____ _____ | _____ _____ | _____ _____ |
| Loss of sales confidence | _____ _____ | _____ _____ | _____ _____ |

Monthly reality review

| Question | Answer |
|---------------------------------------|----------------|
| The decision I am avoiding | _____ _____ |
| The pressure affecting my judgement | _____ _____ |
| The person I need to speak to | _____ _____ |
| The commercial reality I need to face | _____ _____ |
| One commitment for next month | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
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Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Failure Review Canvas

Pairs with: Failure can become useful if it is processed properly

Review a difficult ending without blame and turn the experience into usable guidance.

Founder / team

Account / market / topic

Date

When to use it

Use after a failed raise, missed renewal, painful restructure, or formal closure when you are ready to extract the lesson.

What this worksheet covers

What was true

What we believed

What we ignored

What I would do differently

What another founder should do six months earlier

Questions to answer before you start

What facts were true at the time?

What did you believe that later proved wrong?

Which signals were ignored?

What would you do differently?

What should another founder do earlier?

Failure review canvas

| Area | Notes |
|-----------------------------|----------------|
| What was true | _____ _____ |
| What we believed | _____ _____ |
| What we ignored | _____ _____ |
| Signals we missed | _____ _____ |
| System or incentive issues | _____ _____ |
| What I would do differently | _____ _____ |
| What I would not repeat | _____ _____ |
| What became useful later | _____ _____ |

Guidance for another founder

| Six months earlier, do this | Why it matters | How to start |
|-----------------------------|----------------|----------------|
| Action 1 | _____ _____ | _____ _____ |
| Action 2 | _____ _____ | _____ _____ |
| Action 3 | _____ _____ | _____ _____ |
| Action 4 | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
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Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review

Ecosystem Leverage Planner

Pairs with: Ecosystem support is leverage, not strategy

Turn ecosystem support, events, and introductions into measurable commercial outcomes.

| | | |
|-----------------------|---------------------------------|-------------|
| Founder / team | Account / market / topic | Date |
|-----------------------|---------------------------------|-------------|

When to use it

Use before joining a programme, attending an event, or asking for introductions.

What this worksheet covers

| | |
|--------------------|--------------|
| Current bottleneck | Specific ask |
| Target outcome | Owner |
| Follow-up window | Stop rule |

Questions to answer before you start

What bottleneck are you trying to solve?

What is the specific ask?

Who can actually help?

What outcome would count as useful?

When will you stop or change approach?

Ecosystem leverage plan

| Field | Your answer |
|----------------------------|----------------|
| Current bottleneck | _____ _____ |
| Specific ask | _____ _____ |
| Who can help | _____ _____ |
| Target outcome | _____ _____ |
| Owner | _____ _____ |
| Follow-up window | _____ _____ |
| Evidence to collect | _____ _____ |
| Stop rule | _____ _____ |

Introduction tracker

| Introduction | Target buyer/adviser/partner | Ask | Outcome | Follow-up date |
|----------------|------------------------------|----------------|----------------|----------------|
| Intro 1 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Intro 2 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Intro 3 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Intro 4 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |
| Intro 5 | _____ _____ | _____ _____ | _____ _____ | _____ _____ |

Risks, gaps, and evidence needed

| Risk or gap | Why it matters | Evidence or action needed | Owner/date |
|-------------|----------------|---------------------------|-------------|
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Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review
