

FOR VENTURE CAPITAL AND PRIVATE EQUITY INVESTORS

Lifecycle offer matrix and value thesis library.

From the investment thesis to the sales work that delivers it.

Five stages of the holding period, four buyer stages to measure, and thirteen theses with a stress test for each.

01 · THESIS

Start with the plan and the growth levers that must land.

02 · MEASURE

Score Interest, Intent, Commitment and Value with the Growth Score.

03 · FIX

Pick the lightest intervention that answers the question.

04 · RE-MEASURE

Again after 90 days, so the board sees what moved.

01 · LIFECYCLE OFFER MATRIX

From thesis to intervention, by stage.

Read left to right by stage, and top to bottom from thesis to the stage under pressure, to intervention, to measures. The stages apply to venture capital and private equity. The company opts in at every step.

	Pre-investment Diligence, before the deal completes	First 100 days After the investment completes	Repeatability Year 1 of the plan	Scale New segments, regions, products, acquisitions	Exit or next round 6 to 12 months before the sale or raise
THESIS AND GROWTH LEVERS	Test the revenue assumptions in the plan before the deal completes. Is the pipeline real, and can this team deliver the growth case?	Confirm the base case. Agree first-year priorities, owners and early-warning indicators.	Move from selling that depends on the founder or a few people to a team that wins the same way. Conversion rises and fewer deals are lost along the way.	Move upmarket. New region. New product. Acquired teams. Scale pipeline generation. Retention and expansion.	The revenue story stands up to a buyer's or a new investor's diligence.
STAGE UNDER PRESSURE	**All four scored** to find the weakest	**Commitment and Intent**	**Intent and Commitment**, often Interest	**Interest, Intent and Value**. Supporting: Commitment	**Commitment and Intent**
TYPICAL CHALLENGES	Management's numbers can't be checked against buyer evidence. Diligence reads the CRM, not the deals. Problems surface after completion.	No execution baseline. Stage definitions and forecast are inconsistent. The forecast rests on judgement, not buyer evidence.	Only a few people know what wins. New hires ramp slowly. Sellers each run their own approach. Deal surprises arrive late.	New hires and more activity create variance. Each new motion is run differently. Volume rises and quality falls.	The forecast is unreliable. Pipeline can't be evidenced. Revenue depends on a few people, and diligence exposes it late.
MEASURE	**Growth Score**: a first read	**Growth Score**: the baseline	**Growth Score**: re-measure every 90 days	**Growth Score**: re-measure for each motion	**Growth Score**: the trend for the data room
PRODUCT	**Pipeline Conversion Audit**	**Revenue Workshop**, then **5 Days to Scale**	**Strategic Sales Enablement**, with MEDDPICC Competence Training and Playbooks	**Strategic Sales Enablement** for each new motion, with Playbooks and PlaymakerAI	**Pipeline Conversion Audit**, re-run, then **Live Deal Coaching** with Next Best Actions
GOAL	An evidence-based view of revenue risk. It informs the decision and the first 100 days. It doesn't make the decision.	An agreed baseline, and agreement on what to fix first.	A repeatable way of selling that closes the gap between target, forecast and actuals.	More pipeline and throughput without losing predictability.	A forecast the board can rely on, and a revenue story backed by evidence.
HOW	Selected CRM export, call transcripts and 20 to 40 deals. Evidence map, then a decision workshop.	A 60 minute session on live deals. Then a five day sprint: inspect process, conversion and pipeline quality, define stage gates, prioritise fixes.	Design, Enable, Run. Stage gates and evidence standards, playbooks and qualification, weekly inspection and deal clinics until adoption happens.	Re-run Design, Enable, Run for each motion. Common standards across teams. A workspace per deal for sellers.	Audit evidence standards and stage hygiene. Run a forecast cadence and deal clinics. Produce the reporting pack.
METRICS TO TARGET	**Leading:** pipeline evidence completeness, slippage, stage conversion. **Lagging:** win rate, cycle time, forecast variance.	**Leading:** evidence completeness, slippage, stage conversion. **Lagging:** win rate, cycle time, forecast variance.	**Leading:** stage hygiene, evidence completeness, share of deals won without the founder or top seller. **Lagging:** win rate, cycle time, forecast accuracy.	**Leading:** qualified pipeline created, new-market pipeline quality, expansion pipeline. **Lagging:** win rate, forecast variance, net revenue retention.	**Leading:** evidence completeness, slippage down, stable stage conversion. **Lagging:** forecast variance tightening, cycle time down.
KEY OUTPUTS	Risks to the plan, with evidence. Three management decisions. What to fix in the first 100 days.	Board-ready GTM blueprint. 90 day plan: Now, Next, Later. Evidence tests. Baseline KPI pack.	Stage architecture and exit criteria. Qualification rubric. Playbooks in workflow. Cadence and inspection rubrics. Board reporting pack.	Motion playbooks and stage evidence standards. Onboarding assets. Updated cadence pack.	Forecast pack. Evidence standards per stage. Operating cadence. Written next steps on the deals that matter.
TIME	Five working days once the data is ready	Workshop: 60 minutes. Sprint: five working days over about two weeks	90 days per motion, then Run as needed	90 day sprints per motion	Typically 90 days

02 · VALUE THESIS LIBRARY

Thirteen theses, each with a stress test.

Reusable theses that investors can map to an intervention and to measurable outputs. The stress test lists the leading indicators that show the thesis is happening.

VALUE THESIS OR GROWTH LEVER	THESIS FAMILY	STRESS TEST: WHAT MUST BE TRUE	STAGE UNDER PRESSURE	INTERVENTION
Base case before investment	Diligence	The pipeline is real. Stages have evidence. Slippage can be explained. The growth case doesn't rest on one or two people.	All four, scored	Growth Score, then Pipeline Conversion Audit: 20 to 40 deals, an evidence map and three decisions
Base case after investment	Reset and focus	A baseline is agreed. Win rate doesn't depend on one or two people. The first-year priorities have owners.	Commitment and Intent	Growth Score and Revenue Workshop, then 5 Days to Scale
Founder-led or hero-led selling to a team	Founder transition	Deals close without the founder in the room. The way of winning is written down. A new hire reaches a first qualified opportunity in an agreed time.	Intent and Commitment, often Interest	5 Days to Scale, then MEDDPICC Competence Training and Live Deal Coaching
New sales leader lands	Leadership transition	A baseline is agreed before they start. The leader sponsors the standard. A 90 day plan has owners and KPI bands.	Commitment and Intent	5 Days to Scale with the new leader as sponsor, then Live Deal Coaching
Conversion uplift, less leakage	Conversion improvement	Win rate stabilises or rises. Cycle time falls. Stage conversion stops moving at random. Slippage falls.	Intent and Commitment	Strategic Sales Enablement: stage gates, buyer evidence, qualification and cadence until the team uses them
Scale pipeline generation	Pipeline engine	Meetings and qualified opportunities with ICP-fit accounts rise. Coverage improves. Conversion doesn't collapse as volume grows.	Interest and Intent	Strategic Sales Enablement for the pipeline motion, with Playbooks
Move upmarket or add an enterprise motion	Market expansion: segment	The capability exists in people and method. Evidence discipline still happens as deals get more complex. The forecast doesn't degrade.	Intent and Commitment, often Interest	5 Days to Scale to design the motion, then Strategic Sales Enablement with MEDDPICC Competence Training
International expansion or new region	Market expansion: geography	Time to first qualified opportunity improves. Early pipeline fits the ICP. The leader's capability matches the region's stage.	Interest, Intent and Commitment	5 Days to Scale for the region, then Strategic Sales Enablement
New product or offer launch	Offer expansion	ICP and messaging are clear. Evidence standards are defined. Early pipeline converts. Time to first wins shortens.	Interest and Intent	Playbooks and PlaymakerAI, inside Strategic Sales Enablement
Buy-and-build: cross-sell across acquired companies	Acquisition integration	Acquired teams sell to one standard. Cross-sell pipeline is visible. One forecast covers the group.	Value and Intent	5 Days to Scale across the group, then Strategic Sales Enablement to one standard
Pricing and packaging	Price and margin	Discounting falls. Price changes stick at renewal. Sellers defend value with buyer evidence.	Commitment and Value	MEDDPICC Competence Training and Live Deal Coaching on the deals where price is tested
Retention and expansion	Net revenue retention	Expansion pipeline is visible. Renewals run on a cadence. Churn risk surfaces early. Nothing is lost at handoffs.	Value and Commitment	Strategic Sales Enablement for the expansion motion, with Next Best Actions
Exit or next round readiness	Exit or fundraising narrative	The forecast is predictable. Stages are backed by evidence. Late surprises fall. Revenue doesn't depend on one person.	Commitment	Pipeline Conversion Audit, then Live Deal Coaching: cadence, deal clinics and the reporting pack

HOW TO USE IT

Start with the plan. Score the four stages with the Growth Score. Select the lightest intervention that answers the question. Agree leading and lagging measures up front.

INVESTOR

Spot the signs in the board pack or in conversation. Introduce us to the founder, chief executive or sales leader. See a summary the company has agreed to share.

PORTFOLIO COMPANY

Chooses whether to go ahead. Provides access and data. Sees the findings first and owns the report.

CLOSING FOUNDRY

Works from evidence in calls, CRM and proposals. Designs the standard, installs it in the team's workflow, and coaches until the team uses it.