Venture Review Intake Checklist

What to send, and what you'll get back · Dr. Tim Schneller · collabinspire.com

Venture | Sent by | Date

Step 1 · Pick your stage

Tick the one that sounds most like you today. The exit check is what the review looks for before calling a stage complete.

	Stage	You are here if…	Exit check: ready to move on when…
☐	1 **Learn**	I have an idea and I'm talking to potential customers to understand the problem. I may have a draft business model, but no one is paying yet.	The problem is confirmed in customers' own words, and someone will act on a first solution.
☐	2 **Prove**	I've chosen one specific customer, I'm testing my solution and message with them, and I'm working to get people paying and coming back.	One committed customer pays, and comes back.
☐	3 **Grow**	Customers pay and come back. I'm working on finding more of them in a way that repeats.	Acquisition cost holds as spending rises.
☐	4 **Scale**	I have a repeatable way to win customers, and I'm expanding volume, team or markets.	More can be delivered without margins or quality breaking.
☐	5 **Reinvent**	My core business has flattened or faces a real threat, and I'm starting something new to renew it.	The next idea gets the same discipline as the first.

Not sure? Pick the lower one. It's better to over-deliver against an early stage than to be judged against a later one.

What you'll get back

A written review within five working days of confirming fit, plus an optional call. It opens with one of four calls:

Move forward
The evidence supports the next stage.

Keep testing
The direction is sound; close specific gaps first.

Change course
The evidence points to a different customer, problem or model.

Stop
The evidence says it won't work as framed.

It then shows what your documents evidence, where the venture sits against the exit checks above, and how it rates (Strong, Partial or Gap) on ten dimensions:

1. Problem and founder fit
2. Business model coherence
3. Market sizing
4. Customer discovery
5. Segmentation and ideal customer
6. Competitive positioning
7. Value proposition
8. Economic logic
9. Market signal
10. Evidence chain

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Plus a short list of mechanical fixes, such as numbers that don't tie out, before your documents go in front of anyone who matters. See a sample review →

Step 2 · Send the documents for your stage, and every stage below it

Learn

- ☐ **Problem statement**, including the evidence against your idea, not just for it
- ☐ **Interview notes**: raw quotes from real conversations, one entry per person, dated, plus the interview guide you use
- ☐ **Who your ideal customer is**, and who else is involved: who uses it, buys it, pays, influences, or could block it
- ☐ **Business Model Canvas**, with your riskiest assumption marked: how you tested it, the pass mark you set beforehand, and what happened
- ☐ **Any solution test**: what you tried, the pass mark you set beforehand, and what happened
- ☐ **Market sizing** with every assumption visible and labelled sourced or guessed (the spreadsheet, not a slide of it)

Prove ADD

- ☐ **Segment comparison**: all the customer types you scored, not just the winner
- ☐ **Ideal customer profile**: a named real person, not a demographic
- ☐ **Value proposition**: the jobs, pains and gains it addresses, with the interview quotes behind it
- ☐ **Competitor map**, including "do nothing," which is usually the real competitor
- ☐ **Message testing**: what you sent, to how many people, and what came back
- ☐ **Who pays, and at what price**: full-price customers listed separately from free trials, discounts and pilots
- ☐ **Repeat use or retention numbers**
- ☐ **Pricing terms and unit economics**: the working file (.xlsx), not a PDF

Grow ADD

- ☐ **Channel tests** with real spend and results
- ☐ **Cost to acquire a customer** and months to pay it back, by channel and by quarter
- ☐ **Retention by cohort**: at least three groups of customers, by when they started
- ☐ **Sales playbook**, and who closed each deal

Scale ADD

- ☐ **Who owns what**: one owner and one metric per function, and which decisions happen without the founder
- ☐ **The dashboard leadership actually reviews**, and maps of your core processes
- ☐ **Margins at higher volume**, plus your cash and runway forecast

Reinvent ADD

- ☐ **Several quarters of core-business numbers**, and what made you start something new
- ☐ **Initiatives sorted by horizon**: today's core, what's next, and longer bets
- ☐ **The new initiative's own Learn documents** (above)
- ☐ **How the new initiative is funded**, and the point you'd stop it, written down before you started

Any stage SEND IF THEY EXIST

- ☐ **Partner map**: what you need, who controls it, and what you offer in return
- ☐ **Current pitch deck**, or whatever you show investors, judges or customers
- ☐ **Earlier versions** of any document and any previous review, plus what changed and why

Step 3 · Three ground rules

Native files. The actual spreadsheet, not a screenshot. I check whether the numbers tie out.

Label each document "internal working doc" or "goes in front of investors, judges or customers." External documents get a stricter review.

Include what's not working. Failed tests and the customer who said no raise your credibility. They never lower it.

Step 4 · Send it over

- ☐ Upload at collabinspire.com/#request , or share one folder link. All at once, not a file at a time.
- ☐ Name each file so I can tell what it is without opening it.
- ☐ Flag anything you already know is weak or out of date.

Timing and privacy. I confirm fit within two working days. Reviews are free for founders building in Africa and for MEST and MSOE ventures. Your documents are seen only by me and a second reviewer who works with me, never shared without your permission, and deleted on request.

The review covers the business case only. Team dynamics, legal and intellectual property sit outside it.

Whatever stage you pick, send what you have. Missing documents are a finding, not a failure.

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