

Your brief for an advisory call

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Your expert prepares from this, so it shapes the whole hour. A line or two per question is plenty, rough numbers are fine, and you can skip anything that doesn't apply. It also helps to write it: most people find the decision gets clearer on the page.

Type straight into the boxes in Preview, Acrobat, Edge or Chrome, save the file, then attach it when you book your call.

Your brief is shared only with the expert you book. If you'd like an NDA in place as well, you can add one when you book.

Where you are

Who are you, and what does the business do?

Your name and role, the company, and what it does in a sentence. Add a website if it helps.

Roughly how big is it, and what stage are you at?

Bands are fine: revenue, team size, how long you've been going, how you're funded.

The decision in front of you

What's happening that makes this a live question now?

The offer, the deadline, the number that moved, the conversation that's coming.

What's the decision or challenge, in one sentence?

If it won't fit in one sentence, say so. That's useful for the expert to know too.

What options are you weighing up?

Include doing nothing, and say which way you're leaning, if you are.

What have you already tried, considered or ruled out?

And why. It saves the expert suggesting what you've already been through.

When does this need deciding?

A date, a board meeting, a renewal, a round closing. Or "no deadline, but it's costing us".

What's at stake

What happens if you get this right, and if you get it wrong?

Money, people, time, reputation. Whatever it is for you.

Which numbers should the expert know?

Budget, runway, margins, prices, headcount, the size of the deal. Rough is fine.

Who else has a say in this?

Co-founder, board, investors, a partner, the team. And where they stand, if you know.

The honest version

What worries you most about it?

The sentence you'd leave out of the investor version is usually the one that unlocks the call.

What are you assuming that you haven't tested?

About customers, the market, your team or yourself.

The hour itself

What kind of help do you want?

Pressure-test a decision you've nearly made? Hear how this usually goes from someone who's done it? Find the landmines in a plan? Something else?

Which two or three questions do you most want answered?

If you only get to ask these, the hour has been worth it.

What would you like to walk away with?

A decision, a next step, a number to aim for, a list of what you're not seeing.

Why this expert?

What in their experience made you choose them. It tells them where to start.

Anything they should read beforehand?

One link or document that really matters beats five for context.