

Volume	8	Tools and Presentations
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Key Word Tags	Article Summaries	

OVERVIEW CHAPTER 8.03 ONE PAGE SUMMARIES

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Quick Summary: A collection of one-page summaries of some of the articles and presentations in this collection.

Abstract:

With over 765 articles, tools, and presentations, it is virtually impossible to recall the comments, advice, and recommendations provided, let alone remember where they were. A series of simple, one-page summary documents have been prepared to cover many of those subjects.

In a perfect world, CxO-Atlas.com site visitors would read the articles of interest, review the related presentations, and retain all the details. I am not aware of where that perfect world exists! The One-Pagers in this chapter are intended to be brief reminders or summaries of the key points from several articles and presentations. Some of the One-Pagers can stand on their own with no need to dig deeper into the subject. Others need more layers of detail, perhaps with the guidance of a mentor. Each One-Pager includes a Source reference to articles or presentations that contain more information on the subject.

The One-Pagers are a combination of text and graphics. The majority of them are copies of slides used in the various presentations available on the site. The material is divided into the following ten categories, with the number of One-Pagers currently included in each category shown. Over time, more One-Pagers will be added to the collection. A brief description of each One-Pager that provides some background or context is included at the beginning of each category.

ONE-PAGER CATEGORIES		GENERAL THEMES
CATEGORY	QTY	
1 TRANSITIONS	10	There are several steps along the journey.
2 THE BUSINESS	12	Basic business issues to think about.
3 YOU, THE CEO	8	Some advice and sole-searching issues.
4 SALES and REVENUE	10	It's all about revenue for every company.
5 MARKETING	11	Positioning, communications, and focus.
6 PARTNERS	9	Rely on business partners; you can't do it alone.
7 OPERATIONAL TACTICS	10	Appropriate tactics will keep the lights on.
8 SCALING OPERATIONS	10	Successful execution requires operational changes.
9 INVESTOR ALTERNATIVES	17	There are many options, few are applicable at any one time.
10 FUNDING TACTICS	11	Raising money always gets the entrepreneur's attention.
TOTAL ONE-PAGERS	108	

1 TRANSITIONS

- 1 Ten Steppingstones
- 2 Company Transition
- 3 Business Validation Transition
- 4 Entrepreneur Transition
- 5 Changing Roles
- 6 Revenue Transition
- 7 Pivoting vs "Pogosticking"
- 8 Adapt or Die
- 9 Key Roles
- 10 Organization Expansion

2 THE BUSINESS

- 1 Avocation or Vocation
- 2 Seven Business Principles
- 3 Three Questions To Answer
- 4 Three Levels of Discovery
- 5 The Fourth Level of Discovery
- 6 Avoid the Misses
- 7 Why Do Startups Fail
- 8 Three Kinds of Boards
- 9 Three Types of Boards Comparison
- 10 Options, Shares, & Warrants
- 11 Options, Shares, & Warrants Details
- 12 Determining Options & Share Price

3 YOU, THE CEO

- 1 Taking the Plunge: A Lot to Consider
- 2 Find a Mentor
- 3 My Mentoring Philosophy
- 4 Advice to Entrepreneurs
- 5 Seven Things CEOs Need to Remember
- 6 Listen, Pivot and Adapt #SPILL!
- 8 More Advice

4 SALES and REVENUE

- 1 Three Phases of Revenue: Overview
- 2 Three Phases of Revenue: Key Differences
- 3 Minimum Viable Product
- 4 Cradle to Grave Involvement
- 5 End to End Involvement
- 6 Revenue Focus
- 7 Your Customer Relationship
- 8 Forecasting Mistakes

Complete Listing

- 9 Major Sales Impediments
- 10 Competitive Strategies

5 MARKETING

- 1 Marketing \$ Focus
- 2 Realistic Positioning
- 3 Pick a Word
- 4 The Goal of Communications
- 5 Elevator Pitch Strategy
- 6 Elevator Pitch Example RDK Consulting, Inc.
- 7 Paragraph Elevator Pitch Example
- 8 Parsed Technology Company Elevator Pitch
- 9 Non-Parsed Technology Company Elevator Pitch
- 10 Six Word Examples
- 11 Follow an "Epicenter" Model

6 PARTNERING

- 1 Partnering: The Basics
- 2 Why Partner?
- 3 Types of Partners
- 4 Goliath Sizes
- 5 Starting the Relationship
- 6 During Discussions
- 7 Partner Focus
- 8 The Process
- 9 Partnering Risks

7 OPERATIONAL TACTICS

- 1 Revenue: The Cure or the Mask?
- 2 Expenses Lead Revenue
- 3 Risk Assessment
- 4 Customer Dis-Satisfaction
- 5 Customer Satisfaction Levels: Where are you?
- 6 Customer Satisfaction Level Relationships
- 7 Metrics: The Cornerstone of Execution
- 8 Awareness of Yesterday, Today, and Tomorrow
- 9 Metrics is the First Step toward Improvement
- 10 Change the Future

8 SCALING OPERATIONS

- 1 Scaling the Business
- 2 The Critical Chain*

- 3 Three Variables and One Constant

- 4 Quality and Processes
- 5 Processes: When to Start
- 6 Processes Can Be Simple
- 7 A One Page Process Template Concept
- 8 A One Page Process Template Fields and Descriptions
- 9 A One Page Process Template Example
- 10 A One Page Process Template Example

9 INVESTOR ALTERNATIVES

- 1 Funding Alternatives
- 2 Investor Categories
- 3 Professional Investors
- 4 Non-Professional Investors
- 5 Customer "Financing"
- 6 Angel Investors
- 7 Venture Capital Investors
- 8 Likely Investor Funding Timing
- 9 It's a Game of Outliers
- 10 Angle vs VC Investment Interest
- 11 Investor Instrument Comparison
- 12 Investor Comparison Matrix*
- 13 Valuation Point of View
- 14 Three Most Important Numbers
- 15 Private Company Valuations
- 16 Example of Some Investor Considerations for Pre-Revenue Company Evaluation
- 17 Exit Attractiveness

10 FUNDING TACTICS

- 1 Your Stage vs Investor Interest
- 2 Location, Location, Location
- 3 The Mating Game!
- 4 The Pitch is the Ante
- 5 3 Rs for Investors
- 6 Magic Words to Investors
- 7 Unspoken Investor Observations
- 8 Targeting Investors
- 9 Investor Preparation
- 10 First Investor Meeting Pitch Deck
- 11 Often Neglected Investors