

## Your 90-Day CEO Momentum Plan

This is designed for a 90-day window when a funding opportunity is live or imminent. Every element of your support is calibrated to that timeline. Here's how to use it strategically so that when you walk into the room, you're the most prepared person there.

### INSIDE THIS GUIDE

Page 2 — Your First 30 Days: Align and Build

Page 3 — Days 31 - 60: Refine and Stress Test

Page 4— Days 61 - 90: Execute With Confidence

## Your First 30 Days: Align and Build

The first month inside Tier III is about getting everything in order before the opportunity accelerates. Use this time to establish your foundation with your support team.

First 30 Days	What To Focus On
<b>Meet &amp; Greet Call</b>	Align on your specific funding opportunity, timeline, and the gaps we need to close together.
<b>Financial Statement Review</b>	Submit your P&L, Cash Flow Statement, and Balance Sheet for a full analysis with written feedback.
<b>Narrative Draft</b>	Bring a first draft of your funding narrative or financials to your first 1-on-1 call.
<b>Projections Build</b>	Identify the key assumptions behind your funding ask so we can build defensible projections.

## Days 31–60: Refine and Stress-Test

The middle month is where your materials get pressure-tested. This is the stage most founders skip and where Tier III makes the biggest difference.

Days 31–60	What To Focus On
<b>Second 1-on-1 Call</b>	Analyze refined narrative and financials. Stress-test your numbers against likely funder questions.
<b>Pitch Deck Financials</b>	Submit your pitch deck financial slides for direct feedback before any live presentation.
<b>Investor Package Analysis</b>	Final analysis of your complete investor-ready financial package before submission.
<b>Accountability Check-in</b>	Between-call check-in to stay on timeline and address anything that's surfaced.

## Days 61–90: Execute With Confidence

The final month is about performing. Your materials are ready. Your story is tight. Now it's about showing up as the CEO you've been building toward.

- Submit applications, pitch decks, and financial packages with confidence because you've had expert eyes on every piece.
- Use your accountability check-ins to debrief after pitches and refine for the next round.
- Stay focused on your financial story because while numbers change, your narrative should stay current with them.
- Document what's working so you can replicate it for future funding rounds.

*The goal of the 90-day plan isn't just to get funded — it's to become a founder who knows how to pursue funding at this level again and again. That's what CEO-level financial fluency looks like.*

### How to make the most of your two 1-on-1 calls each month

Your two monthly 30-minute calls are your most direct line to strategic support. Use them intentionally and not just to check in, but to move something forward.

High-value Use of Your Calls	What To Bring
<b>Narrative Refinement</b>	Your current draft funding narrative or pitch script with specific sections you're uncertain about.
<b>Financial Review</b>	Your most recent statements or projections with the questions you're anticipating from funders.
<b>Pre-pitch Prep</b>	Your pitch deck financial slides and the specific audience you're presenting to.
<b>Post-pitch Debrief</b>	Notes from the conversation, questions that came up, and what you want to strengthen for next time.

*Come to every call with a specific question or decision you need help with. The more focused your ask, the more powerful the session. You've earned this level of support and I recommend that you use it fully.*