01 / HANDOFF

The diligence handoff is the thesis test.

What the investment team underwrote should be visible to the people responsible for the hold.

02 / UNDERWRITE

Write the claim before the KPI.

Illustrative thesis: pricing discipline can lift margin.

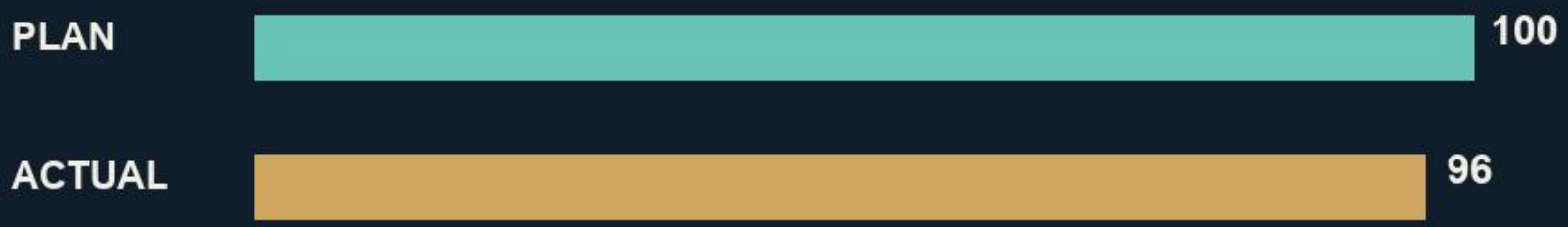
Evidence to retain: price, volume, churn and customer mix.

03 / MONITOR

A variance needs a question.

Illustrative: revenue plan $100m; actual $96m. The gap is −$4m, or −4%.

Ask whether price, volume or mix explains it before prescribing a response.



04 / DECIDE

Carry the evidence forward.

Record the original assumption, its source, the owner and the next review date.

ReturnCatalyst supports source-backed decision work across the deal lifecycle.

