

INDEPENDENT PREWORK · 35–45 MINUTES · LOOK BACKWARD

18-month retrospective

Build a one-page timeline of 8–12 moments across the previous eighteen months. Include life as well as work. Observe first, then name what changed; finish with the three changes the others need to understand. Keep raw personal details private unless you choose otherwise.

Before the workshop: complete this sheet independently. Due 48 hours before Session 1; submit only the material you approve. This is preparation, not an agreed session output.

Your name / note owner

Date

Sharing label

Private / not for synthesis

Period covered

From [month/year] to [month/year]; count back eighteen months from the workshop.

Timeline: 8–12 moments

For each: month/period → what happened → life domain (family, health, identity, location, money, work, relationships) → energy gained/drained → pride, fear, disappointment or meaning → belief/priority changed. Use one short paragraph per moment.

The three changes that matter most

1. What changed / why it matters now.
2. What changed / why it matters now.
3. What changed / why it matters now.

What the others may not understand about me now

What assumption about the old me would be misleading? What do I want them to understand?

Approved share-back only

What am I explicitly comfortable sharing in the workshop? Keep raw details out of this summary if private.

INDEPENDENT PREWORK · 35–45 MINUTES · LOOK FORWARD

12-month future story

Write in the first person, as though it is twelve months after the workshop and the year went extraordinarily well. Start with your life, not a shared-business pitch. The venture may have a large, small or no role. Finish with five specific success conditions.

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Future date and story

Write 1–2 pages. Cover life/family; health/energy; work/professional identity; money/security; location/lifestyle; learning/growth; contribution/relationships; and the role, if any, of the shared venture.

Five success conditions

For each: desired condition → observable evidence → why it matters. Include personal and professional conditions.

Protect / more / less

What must be protected? What do I want more of? What do I want less of?

Boundaries and unacceptable sacrifices

Which financial, health, family, ethical or reputational risks will I not accept?

Partnership fit

How could the partnership advance this future? How could it threaten it? What remains uncertain?

INDEPENDENT PREWORK · 25–35 MINUTES · ONE SHEET PER OTHER PARTNER

Partner feedback

Complete both partner sections independently. Preserve two strengths per person. Describe 1–2 observable behaviors and use behavior → impact → request. Separate direct observation from interpretation; do not diagnose motives. The recipient can clarify and choose what to own or test.

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Partner 1: name and two strengths

Name the person; give an example for each strength and explain what should be protected.

Partner 1: behavior → impact → request

Describe 1–2 behaviors. For each: specific event/date → observed behavior → business/relationship impact → one concrete request. Label any interpretation or uncertainty.

Partner 2: name and two strengths

Name the person; give an example for each strength and explain what should be protected.

Partner 2: behavior → impact → request

Describe 1–2 behaviors. For each: specific event/date → observed behavior → business/relationship impact → one concrete request. Label any interpretation or uncertainty.

My part and approved share-back

What contribution do I own? What may be shared with each recipient? Do not assume consent to wider circulation.

INDEPENDENT PREWORK · 20–25 MINUTES

Role and capacity truth

Use sustainable capacity, not your best week. Make trade-offs visible. This is a proposal for discussion, not a binding commitment or approval of financial/legal risk.

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Current roles and outside commitments

List roles, care responsibilities and other commitments with realistic weekly hours.

Sustainable capacity

Total hours/week; allocation by activity; what must stop to make room; duration this is sustainable; warning signs of overload.

Availability and time zones

Local time zone; working windows; overlap windows; response expectations; planned unavailability. Verify DST against actual dates.

Desired and unwanted roles

What role do I want? What role do I not want? What evidence supports my fit?

Decision ownership and risk boundaries

Which decisions will I own? What financial, legal or reputational risk could I consider? What needs separate explicit approval?

Non-negotiables and constraints

What must the others respect? What trade-off or unanswered question must be resolved?

INDEPENDENT PREWORK · 30–40 MINUTES

Three hard-thesis cards

Write three beliefs that deserve testing, not automatic agreement. Each card needs evidence, counter-evidence and the smallest bounded test. A thesis can concern AI, talent, services, construction, geography, ownership or customer value.

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Thesis card 1

Belief / target customer or domain:

Why I believe it (evidence, source, date, confidence):

Counter-evidence / what could make it wrong:

Smallest test / owner / deadline / time and cost cap:

Success threshold / failure threshold / what result changes my mind:

Thesis card 2

Belief / target customer or domain:

Why I believe it (evidence, source, date, confidence):

Counter-evidence / what could make it wrong:

Smallest test / owner / deadline / time and cost cap:

Success threshold / failure threshold / what result changes my mind:

Thesis card 3

Belief / target customer or domain:

Why I believe it (evidence, source, date, confidence):

Counter-evidence / what could make it wrong:

Smallest test / owner / deadline / time and cost cap:

Success threshold / failure threshold / what result changes my mind:

Priority and connections

Which thesis is most consequential? Which assumptions overlap? Which evidence is missing?

INDEPENDENT PREWORK · 10–15 MINUTES

Workshop outcome card

Define what must exist when these three sessions end. Prefer decisions or artifacts you can inspect over aspirations such as “alignment.” Name the difficult issue directly.

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Three must-have outcomes

1. Outcome / evidence it exists.
 2. Outcome / evidence it exists.
 3. Outcome / evidence it exists.
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Biggest fear

If we get this wrong, what could happen? What safeguard would reduce that risk?

Truth or decision we must not avoid

What needs to be spoken about directly? What would a useful resolution look like?

My contribution

What will I do to make these outcomes possible?

INDEPENDENT PREWORK · 25–35 MINUTES

January & Makosi reality check

Treat the January working positions as historical prompts, not present agreement or findings about anyone. For every position choose still true / changed / unclear / disagree and give evidence. Use the approved facilitator summary, not raw transcript excerpts. Apply the same leadership-feedback standard to both other partners.

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Position 1 · Founders personally own early selling

Status: still true / changed / unclear / disagree. Evidence / source / date. What was never decided? What decision is needed now?

Position 2 · Customer value and market reality lead pricing

Status: still true / changed / unclear / disagree. Evidence / source / date. What was never decided? What decision is needed now?

Position 3 · Lean operations until demand is proven

Status: still true / changed / unclear / disagree. Evidence / source / date. What was never decided? What decision is needed now?

Position 4 · Technology creates measurable customer value

Status: still true / changed / unclear / disagree. Evidence / source / date. What was never decided? What decision is needed now?

Position 5 · Preserve culture, consultant quality, talent pipeline, advisory leverage and agility

Status: still true / changed / unclear / disagree. Evidence / source / date. What was never decided? What decision is needed now?

Preserve and prevent

Which Makosi strength must we preserve? Which failure pattern are we most at risk of repeating? Define safeguard / owner / measure / review date.

Other partner 1 · leadership

Name / where leadership helped / observable behavior that created drag / impact / request now. Separate memory, interpretation and verified fact.

Other partner 2 · leadership

Name / where leadership helped / observable behavior that created drag / impact / request now. Separate memory, interpretation and verified fact.

My own repeating pattern

Which behavior of mine could recreate a failure? What observable replacement behavior will I test?

Approved share-back

What is approved for shared synthesis? What stays human-interviewer only or private?

SHARED OUTPUTS · LIVE-SESSION OUTPUT PACK

Session 1 output · Success & alignment maps

Name a human note owner and timekeeper. Obtain unanimous recording/transcription consent or keep recording off. Capture only approved personal summaries. Complete one success map per participant, then compare without forcing consensus. Every unresolved item needs an owner and a route to resolution.

During Session 1: the named note owner captures only approved summaries and provisional decisions. At the close: review this pack together, confirm agreement or record differences, check actions have owners and dates, and approve the shared version. The note owner then exports and circulates only that approved version. This pack is not a pre-work submission.

Session note owner

Date

Sharing label

Shared · approved summaries only

Opening contract

Date / facilitator / timekeeper / note owner. Confidentiality and sharing agreement. Recording and transcription consent from everyone (or off). Decisions and evidence rules.

Success map · Darren

Approved summary only: five success conditions / what must be protected / contribution / non-negotiables / partnership fit / tensions or questions.

Success map · Graham

Approved summary only: five success conditions / what must be protected / contribution / non-negotiables / partnership fit / tensions or questions.

Success map · Seth

Approved summary only: five success conditions / what must be protected / contribution / non-negotiables / partnership fit / tensions or questions.

Shared resonance and differences map

For each theme: reinforcing goals / differences / incompatible expectations / implications / agreement not yet reached.

Open-question register

ID / question / why it matters / evidence needed / owner / due date / status / next decision forum.

Close and decision log

Each person: energy / caution / trust / desire to continue. Each decision: decided / test approved / evidence owner and deadline / parked. Record dissent and privacy limits.

SHARED OUTPUTS · LIVE-SESSION OUTPUT PACK

Session 2 output · Partner compact

Use a neutral human facilitator when available; otherwise scripted equal-time peer rounds. Nobody facilitates or adjudicates feedback about themselves. Hear all six partner-to-partner perspectives. The recipient owns, tests or carries an item; listening is not forced agreement. Capture commitments, not private raw feedback.

During Session 2: the named note owner captures only approved summaries and provisional decisions. At the close: review this pack together, confirm agreement or record differences, check actions have owners and dates, and approve the shared version. The note owner then exports and circulates only that approved version. This pack is not a pre-work submission.

Session note owner

Date

Sharing label

Shared · approved summaries only

Safety and round plan

Date / neutral facilitator or peer script / note owner / timekeeper / privacy and recording consent. Equal recipient time; no interruptions; clarify before responding.

Strengths map

Darren / Graham / Seth: two strengths each, supporting observation, what must be protected in the operating model.

Feedback coverage and response

For each of the six directed pairs: heard? recipient response (own / test / carry unresolved) / approved summary only. Record evidence requests separately; do not adjudicate memories.

Capacity truths

Each person: sustainable hours / allocation / outside commitments / overlap windows / unavailable dates / desired role / excluded role / decision ownership / risk constraints.

Behavior commitments

Person / observable behavior / business or relationship impact / specific replacement behavior / measure / start date / review date. Include clarity, presence, conflict handling and decision transparency symmetrically.

Thirty-day partner compact

Commitment / owner / support needed / success measure / review date / reviewer / if missed, repair step. Set an actual calendar date; record unresolved conditions and consent.

Trust conditions and decision log

Communication cadence / escalation route / response expectations / decisions or tests approved / parked issues / owner and deadline. Do not turn private feedback into shared notes without permission.

SHARED OUTPUTS · LIVE-SESSION OUTPUT PACK

Session 3 output · Tests, gate & Act II brief

Begin with ownership, not rebuttal. Separate historical positions from current decisions. For each thesis distinguish evidence from belief. End with an explicit continuation decision and a bounded Act II brief; proceeding is not permission to spend, hire or make external commitments.

During Session 3: the named note owner captures only approved summaries and provisional decisions. At the close: review this pack together, confirm agreement or record differences, check actions have owners and dates, and approve the shared version. The note owner then exports and circulates only that approved version. This pack is not a pre-work submission.

Session note owner

Date

Sharing label

Shared · approved summaries only

Ownership commitments

Each person: what I heard / what I accept / what I will change / measurable evidence / review date / what remains unresolved.

January position register

For each: founder-led selling; market-led pricing; lean operations; customer-valued technology; Makosi strengths. Record still true / changed / unclear / disagree, evidence, actual current decision, owner and deadline.

Agreed hard-thesis register

ID / thesis / sponsor / supporting evidence with source/date / counter-evidence / confidence / agreement, disagreement or unresolved assumption / what changes our mind.

Bounded experiment slate

ID / assumption / smallest test / owner / time and cost cap (approval needed separately) / evidence / pass and fail thresholds / deadline / review date / next action for each result.

Continuation decision

Proceed to Act II / pause for partnership repair / narrow scope. Record rationale, each person's position, dissent, conditions, owner, review date and what is explicitly NOT approved.

Act II design brief

Purpose / customer and problem / scope in and out / required outputs / owner / participants / input evidence / dates / capacity constraints / approval gates / unresolved questions.

Founder-led sales decision list

Named markets/accounts / minimum weekly founder selling capacity / US presence / pipeline targets / BDR support / pricing authority / evidence-based hiring or handoff trigger. Mark unresolved items with owner and date; do not invent agreement.

Makosi-pattern safeguards · 30/90 days

Pattern to avoid / strength to preserve / observable safeguard / owner / measure / 30-day check / 90-day check. Cover customer priority, clear vision, direct conflict resolution, decision transparency, hiring quality, lean cost and customer-valued technology.

Final action and decision log

Action or decision / status (decided, test approved, evidence needed, parked) / owner / deadline / evidence link / review forum / privacy approval. Name the next check-in.
