BD-01 — Find a problem worth understanding

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Use brief notes and aliases. Keep completed records private. Label any continuation with the form code, question and date. The same forms are included in the book and its worksheet companion.

Customer, task and recent problem

Observed behavior, source/date and note permissions

Your interpretation and existing alternative

Interest, task completion and paid demand, kept separate

Next bounded experiment, success/stop conditions

Owner, review date and evidence that would change the decision

BD-02 — Write a model you can revise

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Model version/date and intended customer

Problem, proposed offer and promised result

Delivery method, inputs and dependencies

How customers could find the offer; permission limits

Cost/revenue assumptions and weakest evidence

Next check, owner and decision history

BD-03 — Compare alternatives fairly

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Customer task and alternatives, including doing nothing

Sources, dates, scope and what was actually observed

Comparable features, prices and exclusions if known

Interpretations and missing information

Reason to keep the current alternative

Claim to test, fair evidence and next review

BD-04 — Find the requirements for your actual activity

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Actual activity, locations and operating circumstances

Separate agency/adviser question for each requirement

Official source, date checked and scope of answer

Application/approval status and evidence reference

Conditions, unresolved questions and next check

Responsible person and real source for any deadline

BD-05 — Keep business identity consistent

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Project/brand label and legal-seller question

Document references and source of each name/status

Mismatches, corrections and version history

Institution requirements and actual response reference

Application, approval and operational availability states

Protected record locator and next action; no secrets

BD-06 — Test the economics and the time

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One order, currency, period and model version

Price and included per-order cash costs

Owner-time hours/rate, if used; keep allowance separate

Fixed/startup costs, exclusions and evidence sources

Contribution, whole-order threshold and delivery capacity

Changed assumption, revised result and next check

BD-07 — Describe the offer and its limits

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Offer version, customer task and defined deliverable

Included work, exclusions and required customer inputs

Timing assumptions, dependencies and revision scope

Price/payment/refund questions for actual terms review

Factual acceptance checks and rights/permission gaps

Requested change, actual agreement and next step

BD-08 — Follow a proposal without inventing revenue

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Inquiry/proposal ID and permitted contact route

Offer version, quoted amount and date

Actual status and supporting response reference

Payment and delivery states, recorded separately

Next agreed action, owner and capacity dependency

Decline/change history and review date

BD-09 — Test the purchase journey before relying on it

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Use brief notes and aliases. Keep completed records private. Label any continuation with the form code, question and date. The same forms are included in the book and its worksheet companion.

Offer/version, test environment and exact test scope

Seller/terms/permissions questions and source references

Receipt and delivery tests: actual results/evidence

Failure, refund, privacy and recovery checks or gaps

Unresolved blockers, responsible person and retest

Owner decision and limits; simulation is not a sale

BD-10 — Deliver a defined result and handle changes

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Order/deliverable version and agreed scope reference

Input completeness and rights/permission checks

Quality checks actually performed and findings

Issue, change request and rework record

Delivery/access evidence; acceptance kept separate

Correction or continuity handoff and next check

BD-11 — Review cash timing and unfinished work

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Review period, currency and opening-balance basis

Dated cash received and supporting references

Dated outflows/refunds and supporting references

Unpaid, upcoming and other funding items kept separate

Reconciliation, exclusions and remaining uncertainty

Decision, responsible person and next review

BD-12 — Decide what to improve, pause or repeat

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Model/version and evidence from the latest period

Customer, quality, time and cash findings

Continue/revise/pause/stop options and reasons

Next test, time/cost limit and stopping condition

Continuity dependency and authorized record reference

Decision, owner, review point and evidence still needed