

## The First Year Startup Dossier: Every Document You Must Have by Month 12

### Go-to-Market & Sales Core

1	<b>Go-to-Market Plan</b> – Segments, personas, value messaging, sales stages, and channel motion.	
2	<b>Unique Selling Proposition (USP) Statements</b> – Tailored by persona and vertical. Hard-hitting, specific, and trust-building.	
3	<b>Sales Scripts</b> – Persona-specific dialogues covering cold opens, discovery, qualification, and closing.	
4	<b>Solution Engineer (SE) Demo Scripts</b> – Technical walkthroughs with feature-to-benefit mapping and objection pre-empts.	
5	<b>Objection Handling Playbook</b> – Structured matrix of resistance points with approved counter-narratives and proof points.	
6	<b>Battle Cards</b> – Competitive comparisons with clear “why we win” framing per persona.	
7	<b>Quote Template</b> – Editable, branded, and margin-aware. Integrates with CPQ if used.	
8	<b>Invoice Template</b> – Matches quote. Payment terms clearly defined. Ideally embedded in the CRM.	
9	<b>Pricing Sheets</b> – Public-facing and internal versions. Internal sheet includes discounting rules, margin thresholds, and bundling logic.	
10	<b>Sales Enablement FAQ</b> – Answers to common product, pricing, procurement, and security queries.	

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### Marketing & Campaign Assets

11	<b>One-Pagers</b> – By product and use case. Should be short, visual, and immediately legible.	
12	<b>Product Datasheets</b> – Clean, technical summaries. Compatible with procurement submissions.	
13	<b>Use Case Library</b> – Industry-specific stories showing how you solve real-world problems.	
14	<b>White Papers</b> – Authoritative, properly cited, trust-building. Often used in pre-sales to anchor technical validation.	
15	<b>Case Studies</b> – Short, verifiable stories of customer wins. One per ICP is a good benchmark.	
16	<b>Customer Reference Call Scripts</b> – Pre-briefs for customers + follow-up flow for prospects.	
17	<b>Product Brochures</b> – Designed for distribution at events or sales follow-ups. Should reflect tiered products or bundles.	
18	<b>Event Collateral Pack</b> – Flyers, booth banners, QR signup sheets, demo booking links.	
19	<b>Brand Guidelines / Book</b> – Logos, tone of voice, style, colour palette, slide templates, boilerplate.	

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### Product & Technical Documentation

20	<b>Product Roadmap (Public + Internal)</b> – Internal includes dependencies and sprint commitments; public is trimmed for safety and confidence.	
21	<b>Release Notes</b> – Clear, accessible summaries that customers actually read.	
22	<b>Feature Adoption Guides</b> – Internally used to train sales/support on how to position new features.	
23	<b>API Docs</b> – Live page on website or PDF, indexed, with use-case examples.	
24	<b>Architecture Diagram</b> – Visual of platform components and data flow of the product.	
25	<b>Security Policy Overview</b> – Plain-English summary of encryption, access controls, backups, etc.	
26	<b>Risk Register</b> – Log of technical, operational, and strategic risks; includes likelihood, impact, owner, mitigation.	
27	<b>Changelog Feed</b> – Public or semi-public updates tracking changes. Bonus: helps SEO.	
28	<b>Support Playbook</b> – Categorises ticket types, SLA policies, escalation paths.	

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### Partner & Channel Operations

29	<b>Partner Programme Overview</b> – Tiers, incentives, onboarding flow, deal registration process.	
30	<b>Deal Registration Form</b> – Ideally embedded in CRM or integrated to a website form.	
31	<b>Channel Partner Playbook</b> – Full stack: value prop, pitch deck, enablement kit, demo script.	
32	<b>Marketing Development Fund (MDF) Guidelines</b> – What's eligible, how to apply, how performance is tracked.	
33	<b>Partner Scorecards</b> – Weekly/monthly KPIs covering engagement, pipeline contribution, win rate.	
34	<b>Co-Selling SOP</b> – Defines who leads, how support is routed, and CRM entry expectations.	
35	<b>Joint Business Plan Template</b> – Shared goals, GTM motions, investment breakdowns.	

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### Finance & Investor Readiness

36	<b>12-Month Cash Flow Forecast</b> – Tied to headcount, pipeline, and known liabilities.	
37	<b>Full Financial Model</b> – Base, stretch, and downside cases. Inputs traceable, logic visible.	
38	<b>Cap Table</b> – Current and post-financing versions with fully diluted views of the shares.	
39	<b>Investor Deck</b> – Narrative-first, metrics-backed. Tailored versions for angels and VCs.	
40	<b>Monthly Investor Update Template</b> – Covers traction, burn, key metrics, asks.	
41	<b>Due Diligence Folder</b> – Pitch, model, contracts, IP docs, metrics, roadmap, all logically arranged.	
42	<b>Work Package Briefs</b> – Especially for grant funding or accelerator submissions. Clearly outlines deliverables, budget, strategic value.	
43	<b>Investment Proposals</b> – Concise narratives structured to fit pitch contests, grant applications, or early LP decks.	

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### Legal & Compliance Infrastructure

44	<b>Shareholder Agreement &amp; Founders' Terms</b> – Includes vesting, drag-along, founder dispute clauses.	
45	<b>MSA (Master Service Agreement)</b> – Standard contract with service terms, limitations, and liability sections.	
46	<b>Terms of Service &amp; Privacy Policy</b> – Hosted online; meets GDPR and PECR (UK) expectations.	
47	<b>Data Processing Agreement (DPA)</b> – Customisable per client, outlines roles, rights, and breach protocols.	
48	<b>NDA Template</b> – Mutual or one-way depending on context. Ideally e-sign enabled.	
49	<b>Intellectual Property Assignments</b> – Especially for early hires and contractors.	
50	<b>Employment Agreements</b> – With intellectual property, NDA clauses and notice periods defined.	

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### Operational Planning & Internal Alignment

51	<b>Business Plan</b> – Executive summary, GTM, team, financials. Often used for accelerators and grant bodies.	
52	<b>Strategic Plan</b> – 1-year and 3-year vision, including OKRs and key milestones.	
53	<b>Operational Handbook</b> – Who does what, when, and how. Often built in Notion or Confluence.	
54	<b>OKR Tracker</b> – Department and company-wide objectives and measurable key results.	
55	<b>Internal Wiki or SOP Bank</b> – Onboarding, tools, key workflows documented in plain English.	