Performance Toolkit: AI Prompts for Founders

Watch the numbers that matter, and act on them every month.

About this toolkit

Two AI prompts that help a founder keep the business on track: choose a handful of numbers to watch, put them on a simple dashboard, and run a monthly review that ends in clear actions. Each prompt makes the AI act as a performance adviser: it asks about your goals and data first, then builds the dashboard or report around them.

Who it is for: founders who find out about problems too late, or who have plans and targets but no regular way to check them.

What each prompt comes with:

- The problem it solves, in plain words
- The prompt itself, ready to copy
- A ready-to-use Word or Excel file, created by the AI for your business
- A sample output from our fictional sample business
- A short "check before you rely on this" list
- The decisions to make from the result

Use them together. Build the KPI dashboard once. Then update it each month and use the monthly review prompt to turn the numbers into a short report and a focused meeting.

This toolkit works best last. It tracks the goals from your Strategy Toolkit annual plan and the figures from your Finance Toolkit.

How to use these prompts

You don't need any technical skills: copy, paste, answer questions, then review.

1. Open an AI assistant that can create files, such as Claude, ChatGPT, Gemini or Microsoft Copilot.
2. Copy everything inside the grey prompt box and paste it into a new chat.
3. Answer the AI's questions one at a time, using your real records.
4. Review the output with the "check before you rely on this" list.
5. Ask for changes in plain words, for example "add a KPI for online orders".
6. Download the Word or Excel file the AI creates and save it. If your AI tool can't create files, it will give you the text or tables to paste in yourself.

Protect your data. Don't paste bank account numbers, BVNs, staff personal details or client names into free AI tools.

The sample business

Ewa Foods Ltd is a fictional business created by Outlier Venture Lab for illustration. Its figures are realistic but invented.

Ewa Foods makes plantain chips and pepper soup spice blend in Ikorodu, Lagos. In 2027 it raised its chip price, launched a 50g pack, leased a new fryer and set an annual plan: ₦72 million in sales, ₦4.5 million operating profit, and a ₦2.2 million cash cushion by the third quarter.

Its Business Health Check rated Performance as Urgent: the founder tracked no numbers each month and held no review meetings. The samples below show Ewa's dashboard and review for March 2027.

Prompt 1: What numbers should I track?

Builds: six to eight KPIs with clear formulas, targets, owners and traffic lights, and a dashboard you update in under two hours a month. **Excel file:** KPI Dashboard.

The prompt (copy everything in the box)

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Act as an experienced business performance adviser who works with small businesses and early-stage founders in Nigeria and Africa.

Help me choose the few numbers that tell me how my business is really doing, and build a simple dashboard I can update every month.

How to work with me:
- Ask the questions below ONE AT A TIME and wait for each answer.
- Keep your replies short: no more than 3 or 4 sentences between questions. Save explanations for the final results.
- If I'm unsure about an answer, help me think it through with one or two simple follow-up questions.
- If I have an annual plan, business plan or Finance Toolkit results from OVL, I can paste them.

Question 1: What is my business called, and what does it do?
Question 2: What are my main goals for this year? Paste my annual plan if I have one.
Question 3: What numbers do I track now, if any, and where does the data come from (bank statements, sales book, accounting software, spreadsheets)?
Question 4: What problems have surprised me in the past because I wasn't watching the right number?
Question 5: Who will collect the numbers and update the dashboard each month?
Question 6: Do I have targets for any of these numbers? If not, help me set realistic ones from my results so far.

Definitions:
- A "KPI" (key performance indicator) is a number that shows whether the business is on track for a goal.
- "Leading" KPIs give early warning (for example enquiries, money owed to me, stock levels). "Lagging" KPIs show results after the fact (for example sales, profit).
- Traffic lights: green = on or better than target; amber = up to 10% worse than target; red = more than 10% worse than target. For KPIs where lower is better, such as waste or days to get paid, "worse" means higher.

Then produce, in the chat:
A. Six to eight KPIs, no more, covering money, customers and operations, with a mix of leading and lagging. For each: name; why it matters; exact formula; data source; target; owner; how often to update.
B. The dashboard layout: what goes at the top, and how to show each KPI (number, traffic light, 12-month trend).
C. A step-by-step monthly routine for collecting the data and updating the dashboard, taking no more than 2 hours.
D. The numbers I should stop tracking or reporting because they don't drive decisions.
E. A list of any assumptions you made.

Use only data sources I actually have. If a KPI needs data I don't collect yet, say so and suggest the simplest way to start collecting it. Use Nigerian Naira (₦) unless I say otherwise.

EXCEL FILE: Also create a downloadable Excel file (.xlsx) named "[my business name] KPI Dashboard" with these sheets:
- "KPI Definitions": each KPI with its formula, data source, owner, target, and whether higher or lower is better.
- "Monthly Data": one column per month for 12 months, with yellow input cells for the raw figures each KPI needs.
- "Dashboard": for the latest month, each KPI's actual, target and traffic light (coloured automatically using the rules above), plus a small trend chart for each KPI over 12
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months.
Calculate every KPI with live Excel formulas from the Monthly Data sheet, never typed-in
results. Format money in Naira with thousand separators. If you cannot create files, tell
me clearly, then give me each sheet as a table I can paste straight into Excel.

CALCULATIONS: If you can run code, use it for every calculation and to build any file.
Check every total before you show it. If a figure in the chat and the same figure in the
file disagree, tell me, and treat the file's formula as correct.

Finish by asking me: "Who will update the dashboard each month, and by which date?"
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Sample output: Ewa Foods, dashboard for March 2027

KPI	Formula and source	Owner	Target	March actual	Status
Monthly sales	Total invoiced sales (sales book)	Sales officer	₦5,500,000	₦5,600,000	Green
Contribution margin	(Sales minus materials, packaging and commission) ÷ sales	Accountant	42.0%	41.2%	Amber
Operating profit	Contribution minus fixed costs (management accounts)	Accountant	₦160,000	₦157,200	Amber
Closing cash	Bank balance at month end (bank statement)	Accountant	₦2,200,000	₦1,250,000	Red
Days to get paid	Average days from order to payment for credit customers	Accountant	62 days	64 days	Amber
On-time deliveries	Deliveries on agreed day ÷ all deliveries (delivery log)	Sales officer	98%	98.5%	Green
Waste	Rejected packs ÷ packs produced (production log)	Production lead	4.0% or less	4.3%	Amber
New retail outlets	New outlets ordering this quarter (sales book)	Sales officer	3 a quarter	3 in Q1	Green

Leading and lagging: days to get paid, waste and new outlets give early warning; sales, margin, profit and cash show results.

Monthly routine: by the 3rd working day, each owner sends their figures to the accountant; by the 5th, the accountant updates the dashboard; the review meeting is on the first Monday after that.

Stop tracking: Instagram follower numbers. They don't predict orders. Track online orders instead, inside monthly sales.

Check before you rely on this

☐ Are there eight KPIs or fewer?

☐ Does every KPI have an exact formula, a data source and one owner?

☐ Do the targets match your annual plan and Finance Toolkit figures?

☐ In the Excel file, change one month's figures and check the traffic lights and charts update.

Decide from this

- Which KPI would have warned you earliest about your last big problem?
- Who updates the dashboard, and by what date each month?

Prompt 2: How did we do this month?

Builds: a two-page monthly review report with a summary, KPI results and explanations, milestone status, actions with owners, and a meeting agenda. **Word file:** Monthly Review.

The prompt (copy everything in the box)

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Act as an experienced business performance adviser who works with small businesses and
early-stage founders in Nigeria and Africa.

Help me write a short monthly review report and plan the review meeting, so my team looks
at the right numbers, understands what happened, and agrees clear actions.

How to work with me:
- Ask the questions below ONE AT A TIME and wait for each answer.
- Keep your replies short: no more than 3 or 4 sentences between questions. Save
explanations for the final results.
- If I'm unsure about an answer, help me think it through with one or two simple follow-up
questions.
- If I have a KPI dashboard or annual plan from OVL, I can paste them.

Question 1: What is my business called, and what does it do?
Question 2: Which month is this review for?
Question 3: What were my KPI results for the month against target? Paste my dashboard if I
have it.
Question 4: What went well this month, and why?
Question 5: What went badly or missed target, and why? If I don't know why, say so.
Question 6: What is my cash position at month end, and what money is owed to me and by me?
Question 7: How are the milestones in my annual plan going? Paste the status if I have it.
Question 8: What decisions or problems need the team's attention this month?
Question 9: Who attends the review meeting, and how long do we have?

Definitions:
- A "variance" is the difference between the actual result and the target, in Naira or %.
- Every action must have one owner and a due date.
- Use the same traffic-light rules as my dashboard: green = on or better than target;
amber = up to 10% worse; red = more than 10% worse.

Then produce, in the chat:
A. A headline summary of the month in no more than three sentences.
B. A KPI table: actual, target, variance, traffic light, and a one-line explanation for
every amber or red result.
C. What went well, and what didn't, with the cause for each where I gave one.
D. A status update on the annual plan milestones.
E. An action table: action, owner, due date, for every red result and every decision
needed.
F. A 60-minute meeting agenda (or shorter if I said so), with time for each item.
G. Questions to ask the team where the cause of a problem is still unclear.
H. A list of any assumptions you made.

Explain results only with facts I have given you. If you don't know why a number moved,
say "cause not yet known" and add it to the questions for the meeting. Do not soften bad
results. Use Nigerian Naira (₦) unless I say otherwise.

WORD FILE: Also create a downloadable Word document (.docx) named "[my business name]
Monthly Review [month and year]", no more than two pages, with the summary, KPI table,
actions and agenda. Use clear headings and simple tables. If you cannot create files, tell
me clearly, then give me the full text with headings so I can paste it into Word or Google
Docs.

CALCULATIONS: If you can run code, use it for every calculation and to build any file.
Check every total before you show it. If a figure in the chat and the same figure in the
file disagree, tell me, and treat the file's formula as correct.
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Finish by asking me: "Which action is most urgent, and who will report back on it next month?"
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Sample output: Ewa Foods, March 2027 review (extract)

Summary: sales beat target for the first time this year, helped by the new 50g pack. Profit was just below target because plantain prices rose about 8% in March. Cash is still about ₦950,000 below the safety cushion, mainly because one supermarket paid 9 days late.

Amber and red results

KPI	Variance	Explanation
Closing cash (red)	–₦950,000	Rebuilding as planned, but one supermarket's ₦1.1m payment arrived 9 days late, in April
Contribution margin (amber)	–0.8 points	Plantain prices up about 8%; chip price unchanged since January
Operating profit (amber)	–₦2,800	Result of the lower margin; costs were on budget
Days to get paid (amber)	+2 days	The same late supermarket payment; all other customers paid within terms
Waste (amber)	+0.3 points	Cause not yet known; production lead to report back

Milestones: 50g pack launched (done); fryer leased (done); festive deposits policy in place (done); 30-day terms with one chain (at risk: first meeting moved to April).

Action	Owner	Due
Get fixed plantain prices from two suppliers for April to June	Production lead	15 April
Call the late-paying supermarket's accounts team and agree a payment date for April invoices	Accountant	7 April
Find the cause of higher waste and report back	Production lead	Next review
Hold the 30-day terms meeting with supermarket chain A	Sales officer	20 April

Agenda (60 minutes): KPI results, 10 minutes; cash and late payments, 15; plantain prices and margin, 15; waste, 10; milestones and actions, 10.

Check before you rely on this

- ☐ Is every explanation based on facts, with unknown causes marked as unknown?
- ☐ Do the numbers match your dashboard exactly?
- ☐ Does every red result have an action with one owner and a date?
- ☐ Is the report two pages or less?

Decide from this

- Which action is most urgent?
- What will you check first at next month's review?

Check before you rely on any AI performance output

Run through this list every time, whichever prompt you used.

☐ **The numbers are yours.** Every figure comes from your records. Delete anything the AI made up.

☐ **Formulas are clear.** Anyone on the team could calculate each KPI the same way.

☐ **Targets are realistic.** They match your annual plan and Finance Toolkit figures.

☐ **Bad news is visible.** Red results are shown plainly, not explained away.

☐ **Every problem has an owner.** Each red result and decision has an action, one owner and a date.

☐ **It is saved and dated.** Keep each month's review so you can see the trend over the year.

The AI is a fast assistant, not someone who knows why your numbers moved. Ask your team before deciding what caused a result.

Next steps

With a dashboard and a monthly review, you will spot problems early and turn your plans into results month by month.

- **Retake the Business Health Check** every three months to see how your scores in all six areas have changed.
- **Use the other toolkits.** Finance, Strategy, People, Marketing and Sales, and Operations follow the same format.
- **Get expert support.** Outlier Venture Lab works with founders on performance management, financial models and fundraising. Get in touch through our website to book a session.

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