Redline Labs — AI Prompt Card

Copy-paste these prompts; do not retype from a slide. • The AI never touches your .xlsx — paste facts in, paste logic out, *you* own the model. • MGT 816 / PS2

P1 — Driver identification (Analyst)

You are an FP&A analyst at an early-stage SaaS company. Below is our planning case, delimited by ###. Extract every quantitative assumption into a table with columns: driver name | value | unit | financial statement line it feeds | controllable by management (Y/N). Then present the driver tree from sales capacity to ending ARR as an indented list. Do not invent any assumption that is not in the text; instead, end with a list titled "OPEN QUESTIONS" for anything the case leaves unspecified. ### [paste case_facts.txt] ###

P2 — Assumption benchmarking (Skeptic)

You are a skeptical FP&A reviewer. Here is our assumption table: [paste]. For each assumption, classify it as aggressive / typical / conservative for a Series-A B2B SaaS company in 2026, with one sentence of reasoning. Wherever you invoke an external benchmark, name the source and your confidence in it, and tag the line "VERIFY BEFORE USE." Finish by naming the three assumptions that, if wrong, do the most damage to year-end cash, and why.

P3 — Schedule drafting (Builder)

Build a monthly FY2027 customer-count schedule from these assumptions: [paste relevant rows]. Output (a) a 12-column table with beginning balance, new logos, churned logos, ending balance; and (b) for each row, the formula logic in plain words so I can implement it in Excel myself. Explicitly flag any month where a ramp, training lag, or hiring rule changes the calculation. Do not give me Excel formulas with cell references — I own the spreadsheet.

P4 — Scenario building

Create base, upside, and downside scenarios by varying ONLY these four drivers: [list]. For each scenario, give the driver values and a one-sentence rationale grounded in the case facts — no new facts. Present as a table I can paste into my assumptions sheet. Then state which single driver you believe moves December cash the most; I will test your claim with a data table and report back.

P5 — Forecast critique (Board Red-Team)

You are a board director with a venture background reviewing a Series-A company's annual operating plan. Here are our forecast outputs: [paste one-pager numbers]. Ask the five hardest questions you would ask in the board meeting. Then identify any internal inconsistencies — revenue growth vs. sales headcount, CAC vs. marketing spend, support ratio vs. customer count, commission expense vs. bookings. Be direct; do not soften.

P6 — Board narrative (Drafter)

Draft a 250-word board narrative from ONLY the following verified numbers: [paste]. Structure: the headline, the base case, the single biggest risk, and the pre-agreed trigger that would cause us to re-forecast. If a sentence would require a number I did not give you, leave a bracketed placeholder instead of inventing one.

Sequence: P1 (Analyst) → P2 (Skeptic) → P3 (Builder) → P4 (Scenarios) → P5 (Red-Team) → P6 (Drafter). Log every claim you rely on. PS2 due Mon Oct 12, 2026, 1:00 pm on Canvas.