

VC Portfolio Review Agenda



While every firm has unique goals, many Visible customers use a similar agenda structure:

1

Opening and Objectives

- Define meeting focus (e.g., quarterly performance, capital allocation, operational health)
- Meeting Goals: Key decisions expected (follow-on investments, support needs, exit opportunities).
- Review high-level updates (fundraising, LP news, hires)

2

Fund Performance Overview

- Discuss IRR, DPI, TVPI vs. benchmarks
- Review portfolio construction and reserves
- Assess risks and diversification

3

Individual Company Deep Dives

For each company under review:

- Key financials (Revenue, burn, runway)
- Milestones and market opportunities (Product launches, partnerships, competitive landscape, regulatory updates)
- Customer metrics (Acquisition, retention, churn, NPS)
- Team health (Leadership stability, key hires or departures)
- Next steps for capital or strategy (Capital needs, strategic initiatives, follow-on opportunities.)

4

Cross-Portfolio Insights

- Identify patterns and shared challenges
- Value-add initiatives (hiring programs, sales intros, shared services).
- Share success stories and lessons learned

5

Strategic Planning and Decisions

- Prioritize follow-on investments
- Plan exits (M&A, IPO readiness)
- Adjust fund strategy
- Address underperforming investments

6

Action Items and Next Steps

- Assign Owners: For portfolio support, board follow-ups, strategic projects.
- Set Timelines: For deliverables and next review dates.
- Communication Plan: Updates for LPs and broader internal teams.