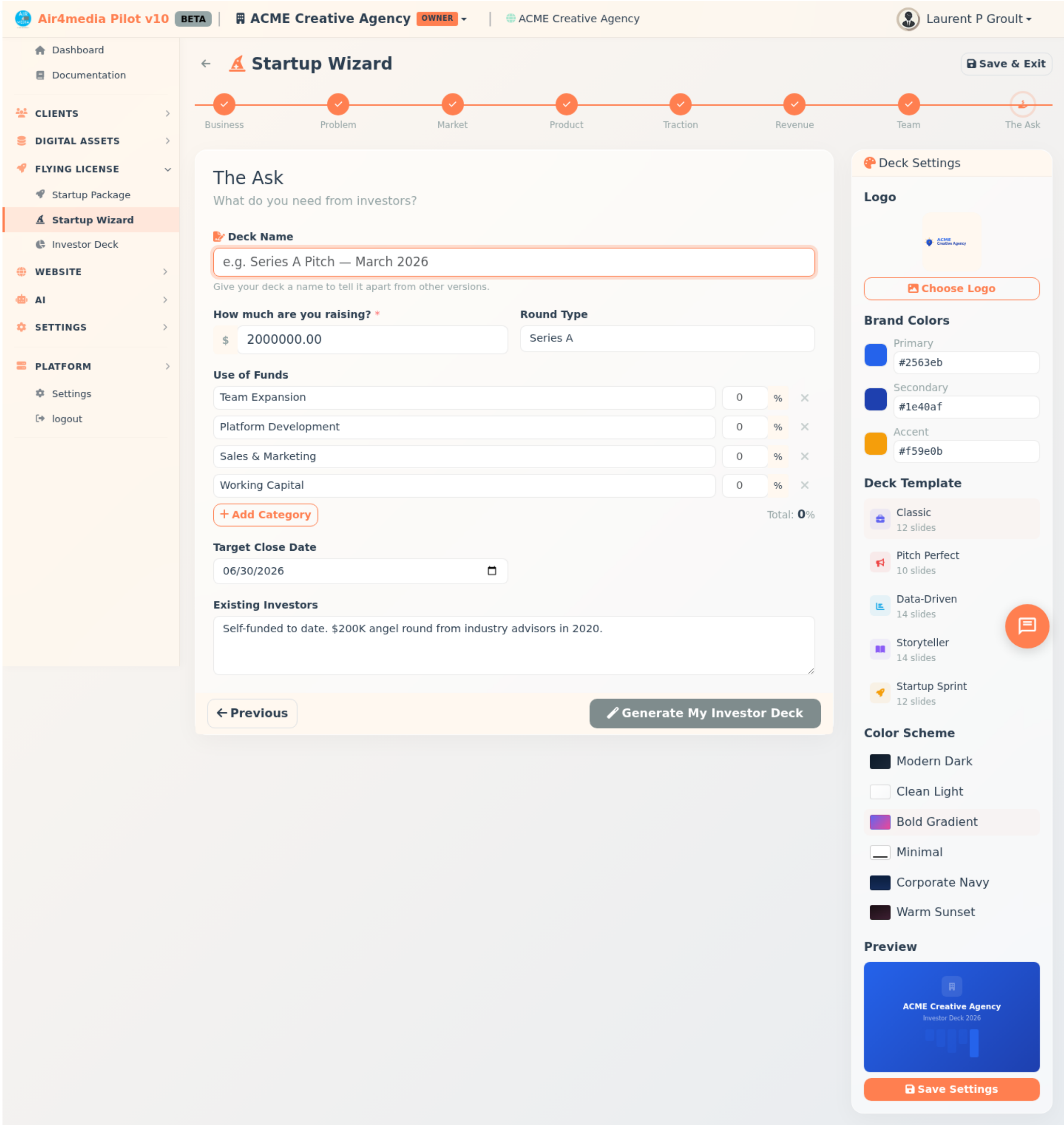

Startup Wizard

The Startup Wizard guides you through collecting everything needed to generate a professional investor deck. Complete 8 focused steps at your own pace — your answers save automatically as you go.

Key Features

- **8-Step Guided Flow**: Covers every section investors want to see — from company basics to your funding ask

- **Free Navigation**: Jump to any step at any time using the progress bar — no need to go in order
- **Auto-Save**: Your work saves automatically a few seconds after you stop typing, and whenever you move between steps
- **Auto-Pull from CRM**: On the Traction, Revenue, and Team steps, click **Auto-Pull** to instantly populate fields from your live Pilot data — for ACME Creative Agency, this pulls in active clients, pipeline totals, and your team roster in one click
- **5 Deck Templates**: Choose a template in the settings sidebar — each produces a different layout and slide count
- **Deck Settings Sidebar**: Set your logo, brand colors (Primary, Secondary, Accent), and color theme — a live preview card updates in real time
- **Logo Picker**: Upload an image, browse your company's Digital Assets library, or generate AI logo variations in Horizontal, Stacked, or Lettermark layouts
- **Multiple Decks**: Create separate decks for different audiences — each has its own data profile and a unique investor share link

The 8 Steps

1. **Company Basics** — Name, tagline, logo, industry, stage, founded date, and website
2. **Problem & Solution** — The problem you solve, your solution, and your unique value proposition
3. **Market** — Target customer and market size (TAM, SAM, SOM)
4. **Product** — Description, up to 6 key features, demo URL, and product stage
5. **Traction & Growth** — Current clients, pipeline, MRR, ARR, and growth rate
6. **Business Model** — Revenue type, LTV, CAC, current revenue, burn rate, and runway
7. **Team** — Founder bio and LinkedIn, team members, and advisors
8. **The Ask** — Deck name, raise amount, round type, use of funds, close date, and existing investors

How to Use

1. Open the Startup Wizard from the Startup page
2. Fill in each step — required fields are marked with a red asterisk
3. On Steps 5, 6, and 7, click **Auto-Pull** to import data directly from your Pilot account
4. Open the **Deck Settings** sidebar to choose a template, set your logo, brand colors, and color theme

5. Use the progress bar at the top to jump between any step at any time
6. Click **Save & Exit** to return to the Startup page without losing progress
7. When ready, go to Step 8, give your deck a name, and click **Generate My Investor Deck**

Deck Templates

Choose a template before generating — each controls layout and slide structure:

- **Classic** (12 slides) — Balanced text, metrics, and charts. The standard YC/Sequoia format.
- **Pitch Perfect** (10 slides) — Bold headlines, one powerful point per slide.
- **Data-Driven** (14 slides) — Heavy on charts and tables. Best for startups with strong metrics.
- **Storyteller** (14 slides) — Narrative-driven with emotional arc. Tells your startup story.
- **Startup Sprint** (12 slides) — Modern SaaS aesthetic with feature cards and icon grids.

Tips

- **Required to generate**: Company name (Step 1), Problem and Solution (Step 2), and Founder name (Step 7)
- **Logo options**: Upload a file (PNG, JPG, SVG, WebP up to 5MB), browse your Digital Assets library, or generate AI variations — pick Horizontal, Stacked, or Lettermark layout and refine with feedback
- **Color Themes**: Choose from Modern Dark, Clean Light, Bold Gradient, Minimal, Corporate Navy, or Warm Sunset
- **Use of Funds**: The tracker on Step 8 turns green when your allocations add up to exactly 100%
- **Investor sharing**: Each generated deck gets a unique share link — send it directly to investors with no login required
- **Multiple decks**: Create or duplicate decks from the Startup Package page — each runs its own independent wizard profile