Beta Tester Guide

Startup Financial Planning Suite

startupfinancialplan.ai

First — Thank You

Your time is valuable. We know you are busy running a business or building a startup. That is exactly why your feedback matters so much — you are the person this tool was built for.

This guide explains everything you need to know before you say yes to joining the beta test. It is written in plain language, no technical background required.

What Is a Beta Test?

A beta test is simply this: **you use a new software product before it is released to the public, and you tell us what works and what does not.**

That is it.

You are not being graded. There are no wrong answers. You are not expected to be a software expert or an accountant. You are expected to be honest about your experience — what was easy, what was confusing, and what you wish the tool did differently.

Your feedback directly shapes the final product. The things you find frustrating will be fixed before thousands of other business owners use this tool. That is the value of a beta tester — and why we are grateful you are considering it.

What Is the Startup Financial Planning Suite?

It is a 10-step online system that walks you through building a complete financial forecast for your business — from estimating startup costs to producing a professional financial report you can share with investors, lenders, or advisors.

Think of it as a structured, guided process that replaces the blank spreadsheet. Instead of staring at an empty Excel file and not knowing where to start, the suite walks you through each piece of the financial plan one step at a time.

The 10 steps are:

Step	What You Do
1	Estimate your startup costs
2	Build your funding plan
3	Create your sales forecast
4	Build your cost model
5	Review and finalize your numbers
6	Review your Income Statement
7	Review your Balance Sheet
8	Review your Cash Flow Statement
9	Download your PDF Financial Report
10	Download your Excel Workbook

You do not need to know what all of these mean before you start. The tool explains each one as you go.

What Will You Actually Be Doing?

Over four weeks, you will work through the 10 steps at your own pace — roughly two to three steps per week. Here is what each week looks like:

Week 1 — Getting Started (Steps 1 & 2)

Time required: approximately 1–2 hours

You will set up your account, explore the tool, and complete the first two steps: estimating your startup costs and building your funding plan.

At the end of Week 1, you will receive a short 3-question survey by email. It takes less than 5 minutes to complete.

Week 2 — The Core Work (Steps 3 & 4)

Time required: approximately 2–4 hours

These are the two most involved steps — building your sales forecast and your cost model. This is where you will spend the most time, and where your input matters most.

You do not need to have perfect numbers. Estimates are fine. The goal is to work through the process and tell us where you got stuck or needed more guidance.

At the end of Week 2, you will receive another short survey by email.

Week 3 — Review Your Financial Plan (Steps 5–8)

Time required: approximately 1–2 hours

The tool will compile your inputs into three financial statements — an Income Statement, a Balance Sheet, and a Cash Flow Statement. You will review these, and you may want to go back and adjust some of your earlier inputs once you see the results.

This is completely normal and expected. Part of what we are testing is how easy it is to revisit and refine your numbers.

At the end of Week 3, you will receive another short survey by email.

Week 4 — Download Your Outputs & Interview (Steps 9–10)

Time required: approximately 1 hour for downloads + 45–60 minutes for your interview

You will download your completed PDF Financial Report and your Excel Workbook — two professional documents you can keep and use for your business.

Then, at a time that works for you, you will have a one-on-one video call with Matt Evans (CPA, founder of startupfinancialplan.ai) to walk through your experience. This is a conversation, not a test. Matt will ask you about what worked, what did not, and what you wish the tool did differently.

How Much Time Does This Take in Total?

Week	Estimated Time
Week 1	1–2 hours
Week 2	2–4 hours
Week 3	1–2 hours
Week 4	1–2 hours (including interview)
Total	**5–10 hours over 4 weeks**

You can spread the work across evenings and weekends. There are no daily deadlines — only the weekly milestones above.

What Do You Need to Have Ready?

You do not need to have everything figured out before you start. But it helps to have a general sense of:

- **What your business does** (or what you are planning to launch)
- **Your major startup costs** — equipment, deposits, inventory, vehicles, website, etc.
- **Your monthly operating costs** — rent, payroll, marketing, insurance, etc.
- **How you plan to make money** — what you sell, what you charge, and roughly how many customers you expect

If you are an existing business, having access to last year's revenue and expense numbers will make the process faster and more accurate.

If you are a pre-revenue startup, estimates are completely fine. The tool is designed for both.

What Happens to Your Feedback?

Every observation you share — in the weekly surveys and in your closing interview — goes directly to the development team. Specific usability problems get logged as design changes. Common points of confusion become clearer instructions. Missing features get added to the product roadmap.

Your name and business details are kept confidential. We may quote anonymized feedback in product documentation, but we will always ask your permission before using your name publicly.

What Do You Get Out of It?

A completed financial forecast for your business — the PDF report and Excel workbook you download in Week 4 are yours to keep and use. For many participants, this is the first time they have had a complete, professional financial plan for their business.

Early access to the full suite before it is available to the public.

A direct line to the founder — your closing interview with Matt Evans is a genuine conversation, not a scripted call. Many beta testers find it valuable in its own right.

Frequently Asked Questions

Do I need an accounting background? No. The tool is designed for business owners and founders who are not accountants. If something requires accounting knowledge, the tool explains it.

What if I get stuck on a step? Email us at matt@startupfinancialplan.ai and we will help you. Getting stuck is useful feedback — it tells us exactly where the tool needs better guidance.

What if I can't finish all 10 steps in four weeks? That is okay. Complete as much as you can and tell us where you stopped and why. Even partial completion gives us valuable information.

Is my data secure? Yes. Your financial data is stored securely and is not shared with anyone outside the development team.

Do I have to pay anything? No. Beta access is completely free.

Can I drop out if I change my mind? Yes, at any time. We appreciate any feedback you can provide, even if you only complete part of the process.

Ready to Join?

If you are ready to participate, click the button below to register for beta access.

Register for Beta Access

If you have questions before signing up, email Matt Evans at: matt@startupfinancialplan.ai

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