

FINANCE FUNDAMENTALS

FOR START-UPS

Overview

From Confusion to Confidence – Mastering Finance for Growth

It's a well-known fact that a third of all new businesses fail within the first 2 years – and the key contributor to this is a lack of understanding of the financial data!

Many entrepreneurs have amazing ideas, real clarity and a huge drive – but often numbers aren't their thing.

You don't need to become an accountant to be able to take the initial steps with your finances – some fundamental knowledge and some tips and guidance will go a long way to driving your business forward and growing your profitability.

Avoiding the numbers or just thinking of them as an annual inconvenience is **costing you money and holding you back!!**

What I've experienced...

You are not alone –

😞 *more than 40% of small business owners consider themselves “financially illiterate”*

😞 *about 60% of entrepreneurs feel they aren't very knowledgeable about finance or accounting in their own companies*

I've worked with many businesses of varying sizes and see a lot of recurring themes and issues cropping up – but it doesn't have to be this way...

- ✅ A little understanding and insight goes a long way
- ✅ Correctly focused insights and actions can make a huge impact on your financial performance
- ✅ Financial information should drive performance, not be a hindrance
- ✅ Not all accountants are the same, some focus on statutory elements (Tax, audit, annual accounts) whilst others (me) focus on using the numbers to help make better informed decisions

Does that sound like you?

Finance Fundamentals is for **YOU** if....

- 👉 You don't feel in control of your finances
- 👉 You know you need to start looking at your finances but don't know where to start
- 👉 You are worried you aren't making informed decisions
- 👉 You want to drive the profitability of your business
- ✅ You want to get all these issues resolved in just 12 weeks with expert advice and guidance and start moving forward with financial confidence!

Finance Fundamentals is a new way of working with me and I'm excited to be taking a limited number of people through it, starting in **April**

What you'll get:

💡 **Regular, accessible and understandable content** through short on-line videos and worksheets

💡 **Clear, bite-sized actions** at the end of each session, designed to get you looking at analysing your own data directly

💡 **Support from me (experienced CFO)** via weekly Any Questions Answered (AQA) sessions, with a focus on the current weeks session and direct feedback based on the information you provide

💡 **Foundational knowledge and confidence** will be built during the course, meaning you no longer need to shy away from finances and will have a solid financial knowledge base to build on as your business grows

What we'll cover:

Finance Fundamentals is structured in a unique 3-phase approach, designed to build your confidence and knowledge step-by-step, with real actionable insights using your financial data!

PHASE 1 - Build the foundation

- 👉 Introduction to Startup Finance & Course Overview
- 👉 Understanding the Profit & Loss Statement
- 👉 Decoding the Balance Sheet
- 👉 Mastering Cash Flow Basics

PHASE 2 - Using finance for decision making

- 👉 Budgeting & Variance Analysis
- 👉 Forecasting for Growth
- 👉 Cash Flow Management & Planning

PHASE 3 - Applying financial strategies for growth

- 👉 Key Financial Metrics, KPIs and Materiality – Understanding What Matters
- 👉 Gross Margin Analysis & Optimisation
- 👉 Planning for the future

What you'll leave with:

- ✓ Understand each of the 3 financial statements
- ✓ Ability to pull basic insights from these statements
- ✓ Perform a simple financial health-check of your business
- ✓ Understand budgeting and forecasting
- ✓ Know how to use these for data-driven decision making to add value and grow your bottom-line profit.
- ✓ Understand and implement KPIs that drive the performance of the business
- ✓ Knowledge of which elements of the financials deserve your time attention and why
- ✓ Ability to improve your understanding and insight of profitability and margins
- ✓ An introduction to financial planning for the future

The investment:

There are 20 spots available for this pilot and spaces are limited, so apply now!

The normal cost of this programme would be £1,200 – however as this is the pilot I am offering the first **4 weeks FREE** – so the entire programme will cost £800.

In order to receive the first **4-weeks FREE**, all I ask is that you view the material, complete the actions and provide me with feedback on the course. If you do this and complete phase 1 and decide that it is not for you, then the £400 you have paid will be fully refunded.

Should you wish to complete the course (I believe you will 😊), then a further £400 will be due over 2 installments.

As a guide, the day rate for CFO advice ranges from £1,000 to £1,500. With the Finance Fundamentals programme you get access to me over 12 weeks plus all of the content and guidance for less than the cost of 1 day with a CFO.

When do we start?

The programme will kick off on 7th April and will continue over 12 weeks, this includes a week catch-up / reflection between each phase

Remember places are limited, so apply today via the form below to secure your spot on this pilot programme.

Application Form:

If you would like to apply for the Finance Fundamentals pilot programme, please complete this form ASAP

[Click here to access the application form](#)

How much time will it take me each week?

The video content each week is 10–15 minutes, plus there is a 30 minute Any Questions Answered (AQA) weekly drop in call. In addition, there will be actions to complete yourself, but these will be kept nice and bite-sized and should be able to be completed comfortably in 30 minutes.