

**Proactively**

Your Business Playground

PARTICIPANT ONBOARDING · PO-01

Getting Started on Proactively

10 minutes to get set up.

20 minutes for your first two milestones.

No technical knowledge needed.

VERSION

1.1

DATE

2026-09-10

PREPARED FOR

Keep this beside you today. For more detail on any one part later, your coach can point you to the Participant Guide.

00 Before you start

By the end of this you'll be able to:

1. Open your invitation and create your account. [page 3](#)
2. Open your roadmap and see which milestone is next. [page 4](#)
3. Fill in and send your Intake Form. [page 5](#)
4. Fill in and send your Internet and Contact Survey. [page 5](#)
5. Find your business plan, your profile and your downloads. [page 5](#)

Have the **invitation email** from your program to hand. A computer, tablet or phone will do, though a computer is more comfortable for the forms, and you can stop at any point: everything saves as you go.

Keep this page

Every answer can be changed later, and short answers are fine.

Everything saves as you go, so stop whenever you like. Nothing here can break your program.

Invitation expired or cancelled? Ask your coach for a new one.

No email from info@proactively.app? Check spam, then **Resend link**.

Signed in as the wrong account? Sign out, then sign in with the right one.

Anything else? Tell your coach. It's far more likely our fault than yours.

01 Open your invitation

3 min

Your coach sent you an email carrying your program's name and logo, with a button that opens Proactively.

1. Click the button in the email. A page says **You've Been Invited!**, with your coach's name and the program.
2. **Already have a Proactively account?** Sign in, then click **Accept Invitation**. You're in; skip to step 03.
3. **No account yet?** Click **Create Account** and continue with step 02. After sign-up you come back to this page and click **Accept Invitation**.

If you happen to be signed in under a different email, the page offers **Accept with <your email>**. That's fine: the invitation is yours whichever address you use. If it says expired or cancelled, ask your coach for a new one. Nothing is lost.

02 Create your account

5 min

Two ways in; pick one.

Option A: Continue with Google

Fastest. Click **Continue with Google**, choose your Google account, done. Your email is verified automatically, so you can skip the rest of this page.

Option B: Email and password

1. Your full name, your email address, and a password (at least 6 characters, typed twice).
2. A **verification email** arrives straight away. Open it and click the link. If it isn't there in a minute, check spam.
3. Back in Proactively, a small amber card sits at the bottom of the screen until you've done that. Click **I've verified** once you have.

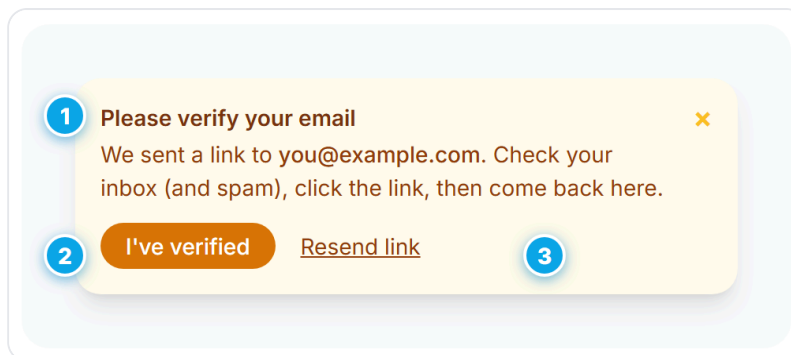


Figure 1. The amber card you'll see after an email-and-password sign-up.

1 The message names the address the link went to. Wrong address? Sign out and sign up again.

2 I've verified refreshes your account after you've clicked the link in the email.

3 Resend link sends the email again.

The card doesn't block you; close it with the × and keep going. Do verify at some point today though, because your confirmation emails and your coach's feedback go to that address.

03 Find your roadmap

2 min

After sign-in you land on **Home**. Click **Roadmap**.

The roadmap is your program: every milestone in order, in three chapters, with the one to do next already selected. You'll come back here every session. The first time it opens, a short welcome greets you by name and points at the two milestones to start with. Click **Let's begin**, or click one of the two highlighted milestones to go straight in.

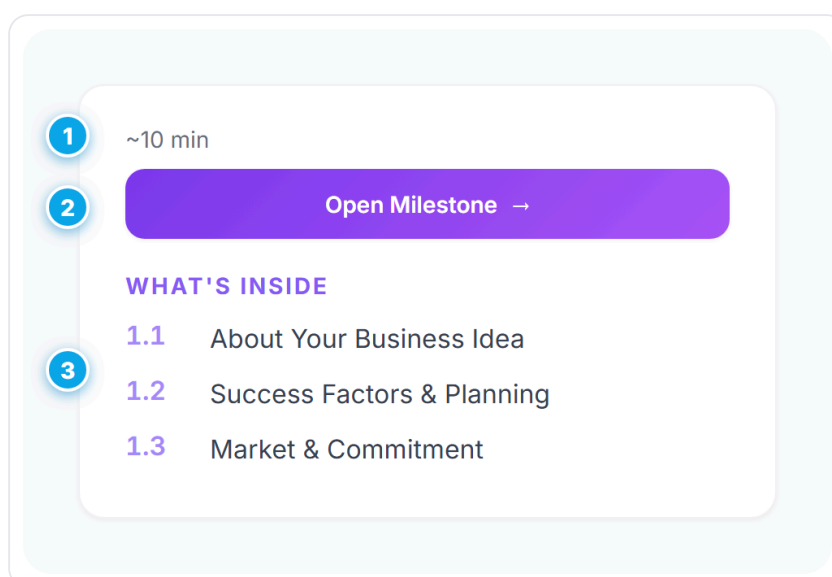


Figure 2. A milestone card. Every milestone on the roadmap looks like this.

1 Estimated time for the whole milestone.

2 The button opens it. Its label tells you the state (step 06).

3 What's inside: the steps, numbered against the milestone (1.1, 1.2, 1.3).

Two things that are normal: if you joined through a partner organisation, its logo and name sit in the band at the top; and if there are fewer milestones than you expected, that's because some programs run a subset. Yours shows exactly the ones it runs.

04 Intake Form

10 min

Click **Open Milestone** on the **Intake Form** card. Three short sections: **About Your Business Idea**, **Success Factors & Planning**, and **Market & Commitment**.

1. Write in your own words. A sentence or two per question is plenty.
2. As you type, the AI tidies your answer and shows the improved version beside your original. Keep whichever you prefer; you can edit either.
3. **Submit** at the end.

WHAT YOU SHOULD SEE

A confirmation screen, and an email titled *"Intake Form, submitted ✓"* with a one-page summary of your answers. Your coach can read them from now on.

05 Internet and Contact Survey

10 min

Back on the roadmap, the next card is already selected: **Internet and Contact Survey**. Click **Open Milestone**.

This one is about your setup, not your business: your experience online, the computer you'll use, how good your connection and tools are (Excellent / Good / Poor / None / Unsure), the best way to reach you, and anything you're concerned about. Answer honestly: "Poor" or "Unsure" is useful information for your coach, not a mark against you. If your program has a course agreement, you download it here.

Finish Milestone at the end. Confirmation email again, and your roadmap now shows both cards as **Submitted ✓** with today's date.

06 Know where things are

Take a minute on the roadmap before you close the tab. The button on each card tells you the state, and the roadmap remembers your place, so fixing a typo in an early milestone never drags you backwards.

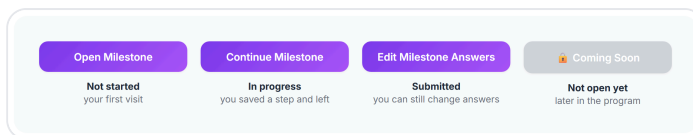


Figure 3. One label per state. You can always go back and change a submitted answer.

Three more places live in the sidebar, and you'll meet them over the coming weeks: **Business Plan**, your plan as it grows from your answers; **Your Business Profile**, a summary that fills itself in, with **My Milestones** inside it; and **Resources**, where a sample business plan waits for when you want to see where this is going.

07 What's next

That's the setting-up done. Your coach will tell you which milestone each session covers; most take 10 to 45 minutes. Everything you submit feeds your **Business Plan**, the document you hand to a lender at the end.

From chapter 2 on, several milestones have a **voice coach** on the right of the page: press **Start** and it talks you through the step, filling in the form as you answer. You can interrupt it, or just type instead.