**Proactively**Your Business Playground

PARTICIPANT GUIDE · PG-01

Your Guide to Proactively

Everything you can do here, in the order you'll meet it.
Nothing to work through in order. Keep it beside you and look up the part you need.

VERSION

1.0

DATE

2026-09-10

PREPARED FOR

If this is your first day, start with **Getting Started on Proactively**, the handout for day one. It walks you through your account and your first two milestones. Come back here when you want to know how one part works.

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Keep this page

Every answer can be changed and resubmitted, at any point in the program.

The AI drafts and critiques; you stay the author of every word that counts.

Submitting is a marker that you're ready, never a lock.

Your plan follows your milestones, so you edit a milestone to change a line in it.

A milestone you expected is missing? Your program runs a subset. Nothing is lost.

An email hasn't arrived? Check spam once; they all come from info@proactively.app.

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

01 The screens you'll use

Six places, and you'll spend most of your time in the first two.

Home	Where you land after signing in, with buttons to everything below.
Roadmap	Your program: every milestone, in order, in three chapters.
Milestone pages	One page per milestone, opened from its roadmap card.
Business Plan	Your plan, assembled from your milestone answers as you go. You submit it to your coach and download it from here.
Your Business Profile	A summary of your business that keeps itself up to date from what you submit. My Milestones lives inside it.
Resources	A sample business plan and the reference handouts.
Explore	Free-form AI chat and quick what-if tools, separate from your program. The last page of this guide.

The roadmap's three chapters are **Getting Started** (intake, surveys, life values, a first look at your idea), **Building Your Business** (products, market, success factors, marketing, operations) and **Your Business Plan** (about the company, financial projections, summary).

YOUR PROGRAM MAY NOT RUN EVERY MILESTONE

Your roadmap shows only the ones yours runs, numbered 01 to N, and the header counts against that N. "All 6 milestones are in" means a finished program, not a partial one. My Milestones still lists the full set, so a milestone that isn't on your roadmap is not one you skipped.

02 Working through your roadmap

The roadmap opens on the milestone **after the one you last submitted**, with a "You just submitted" line naming it. Fixing a typo in an early milestone never drags you backwards. On a phone, a strip across the top steps through the milestones.

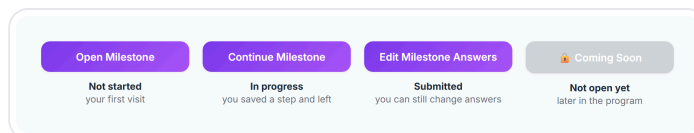


Figure 1. Each card's button says what pressing it does.

Inside a milestone, steps are numbered against the milestone (6.1, 6.2, 6.3) rather than restarting at 1, so "step 2" always means one thing. **Save & Continue** at the bottom of each step records it and moves on; on the last step the button reads **Finish Milestone**.

Your program's branding

If you joined through a partner organisation, its logo, name and tagline appear on the band at the top of your roadmap, on the welcome panel, and on the invitation email that brought you in. The program sets this, not you. If it looks wrong or is missing, tell your coach.

03 The three shapes a milestone can take

They all end the same way, with your answers saved and your coach able to read them. What differs is how you get there.

Voice-guided

Products & Niche, Target Market, Success Factors, and Financial Projections in guidance mode. The page is a form with a panel on the right carrying **Voice**, **Chat** and **Research** tabs. Open **Voice** and press **Start**: an AI coach talks you through the step out loud, asks about your business, and fills in the fields as you answer. Interrupt it mid-sentence and it stops and listens. One session follows you across every step of the milestone.

Nothing forces you to use voice. Type into any field yourself at any time, and the panel takes typed messages too. On **Financial Projections** the coach guides you through the numbers and recaps what you've decided, but you type the values in yourself.

Guided form

About the Company, Marketing Plan, Summary, Self-Employment Readiness, Life Values, Job Analysis by Lifestyle, Internet and Contact Survey. A step-by-step form of text fields, tables, sliders and rating grids, with a rail showing where you are. Some steps have an **AI assist** that reads what you wrote and reacts to it: a critique, a suggested draft, rows it pulled out of your notes for you to edit. You stay the author. The AI never submits for you.

Sectioned form

Your Business Model Concept, Operations & Management, and any form your coach builds for a session. Fill in each question, using the **mic button** to dictate an answer and the **speaker button** to have one read back. **See Preview** at the end of a section shows an AI-refined version beside your original: review it, edit if you like, then confirm. The **AI Coach chat** beside the form asks probing questions rather than handing you answers. When every section is done, click **Submit**.

04 Research you paste is kept in rounds

Several steps ask you to paste research and let the AI pull rows out of it: startup costs in Financial Projections, features and benefits in Products & Niche, the first Success Factors step, and the industry and network research in About the Company.

After a successful extract, your paste moves into a read-only **round** above the box, and the box empties for the next one.

- Pasting more research **adds** a round. The AI reads every round together and reconciles them itself, so combining research is the normal thing to do.
- Nothing is replaced unless you remove a round with its ✕ or press **Start over**, which asks first.
- Rows you typed or edited yourself are never overwritten by a re-extract.
- The extract button reads **Extracted ✓** while nothing has changed since the last run.

05 After you submit a milestone

A completion screen confirms it, and your roadmap card shows **Submitted ✓** with the date. Your coach can read your answers from that moment.

On the sectioned-form milestones an **AI Coach Assessment** appears on that screen too: a short "Strong" and "What to focus on next" read of your answers. **Review Answers** takes you back to edit, and you can resubmit as often as you like. Each resubmit refreshes the assessment and your Business Profile. A confirmation email arrives with a printable summary of your answers.

06 Your business plan

The **Business Plan** page is your plan assembled live from your milestone answers, in chapters: About the Company, Market Research, Operations and Management, Marketing Plan, Financial, Summary, Appendices and Executive Summary.

The plan isn't edited here. It mirrors your milestones, so to change a line you go back to the milestone that wrote it and the plan updates on its own. Chapters you haven't reached show a "No data yet" note naming the milestone that fills them. Some programs also have an **Enhance** tab: an AI-written version of the same work, for you to compare against your own words.

Submitting it to your coach

1. Read your plan through on the **Preview** tab.
2. In the controls above the plan, click **Submit to your coach**. They now read **Submitted** with the date.
3. Keep working. If you change a milestone afterwards, the line reads **changed since** and **Submit again** comes back. Use it when you want your coach to look at the newer answers.

SUBMITTING IS A MARKER, NOT A LOCK

Nothing freezes and there's no penalty for submitting early. Your coach grades the live plan, so a section you improve after they've graded it shows on their side as changed rather than locked away.

Reading your coach's feedback

When your coach sends feedback you get an email whose **View feedback** button opens **Business Plan: Coach Feedback**. You can also reach it from the **Feedback ready** link on the plan page and on the roadmap card. Their written note comes first, then every section of the plan with the grade and comment they left. Sections they haven't reached say "No feedback yet"; sections you haven't filled in say "Not started". Grades never appear over your plan while you're working on it.

07 Cover page and download

You can download at any stage. You don't have to finish every milestone first.

1. Open the **Cover** tab.
2. **Prepared for:** who you're presenting to, such as a lender or an investor group. Leave it blank if there's no one specific yet.
3. **Prepared by:** your name, your location (city, province, country, no street address needed), your phone and your email.
4. **Save.** The page then shows exactly what the cover will look like.
5. **Download**, then **Save to Google Docs** or **Download as Word (.docx)**. If your program has the Enhance tab you're asked which version to download first; your cover goes on whichever you pick.

You get a Word file or a Google Doc with your cover page, a table of contents and your full plan. The logo box on the cover is a placeholder: add your own image after downloading. The first time you choose Google Docs, Google asks permission to create that one document in your Drive. Nothing else in your Drive is visible to Proactively.

DOWNLOADING ALL YOUR ANSWERS IS A SEPARATE THING

Open the user menu (your avatar, top right) and click **Download my data**. You get one Word document: a contents page listing every chapter and milestone, then each milestone on its own page with your answers as you wrote them. That's your answers, not the business plan, which has its own download above.

08 Your Business Profile, My Milestones and Resources

Your Business Profile is a summary of your business that Proactively keeps up to date from what you submit. You don't edit it directly; resubmitting a milestone refreshes it.

Inside it, **View My Milestones** opens the full list with each one's state: **Submitted** with the date, **Not started**, or **Coming soon**. A submitted milestone links to a printable one-page summary of your answers, with Previous and Next to page through the others. A not-started one links to the form. Links in old emails that no longer resolve land here too.

Resources sits below Your Business Profile in the roadmap sidebar and opens in a new tab: a left-hand list of materials, each one rendered on the page. The sample business plan is a PDF you can read there or download.

09 Emails you'll receive

They all come from **info@proactively.app**. If one doesn't arrive, check your spam folder once.

You submit a milestone	Subject " <i><Milestone>, submitted ✓</i> ". View & download summary opens a one-page summary of your answers, with rating questions grouped into Strengths, Average and Needs Work. Use your browser's Print menu and Save as PDF to keep a copy.
You re-submit	The subject starts with " <i>Updated:</i> ", and only if your answers actually changed. Finishing again with no edits sends nothing.
Coach feedback on a milestone	Subject " <i>Coach feedback on <Milestone></i> ", opening the same summary with their grade and comments above your answers. These go out for the Chapter 3 milestones. Ratings on earlier ones still show on your roadmap.
Coach feedback on your plan	Subject " <i>Coach feedback on Business Plan</i> ", sent only when your coach presses Send feedback. One email per round, not one per grade they adjust.

10 Your account

Change your password

1. Open your profile page from the user menu.
2. In **Password**, click **Change password**.
3. Enter your current password, then the new one twice, and **Save**.

New passwords need at least six characters. If you signed up with Google there's no password to change, and the section says so.

Forgot your password

Sign out and use **Forgot password** on the sign-in page. It always says "check your email" whatever you type, but a reset email only goes to accounts that have a password. If you only ever signed in with Google, no email arrives and the page tells you to go back and use **Continue with Google**.

Verify your email

If you signed up with an email and password, a small amber card sits at the bottom of the screen until you click the link we sent. **Resend link** sends it again; **I've verified**

refreshes your account once you've clicked it. The card never blocks the program: dismiss it with the × and keep working. If you signed in with Google you'll never see it.

11 Explore, outside the program

Explore is a separate workspace for thinking out loud with an AI advisor. Nothing there feeds your roadmap or your business plan. It's a sandbox, and most people use it a little at the start, if at all.

Describe your idea or ask a question and the AI walks through product, market, finances and strategy; conversations save on their own. After enough back and forth it offers to build a **storyboard**: a visual dashboard with charts, projections and a SWOT, and a quick what-if model that is not the graded Financial Projections milestone on your roadmap. **Create Business Plan** writes a plan from it, a different document from your program plan, and **Share** makes a read-only link. Free accounts include a limited number of chats and storyboards.