



# 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