

User Journey Flow Documentation (Founder)

1. Entry Point: Sign-Up & Onboarding

Step 1: Sign Up / Log In

- Email / OAuth Sign-In
 - Consent for data sharing & AI-assistance acknowledgment
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Step 2: Founder onboarding Form (post submission: Details should reflect in profile section)

(Organized into sections for deeper insight)



Founder & Team Background

- Full Name, Email ID, Phone Number
 - Founder LinkedIn Profile
 - Founder's Prior Experience (brief narrative)
 - Size & Composition of the Founding Team
 - Are any of the founders full-time? If not, why?
 - Are you drawing a salary from the business currently?
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About the Company

- Company Name & Website
 - Year of Incorporation
 - Which problem are you solving? (Real-world pain point)
 - What is your product/service offering?
 - Who are your target customers?
 - What is your current Go-To-Market strategy?
 - Current monthly revenue
 - CAC, LTV (if applicable)
 - Do you currently have paying customers or pilots?
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Fundraising Intent

- How much are you looking to raise?
 - What would the funds be primarily used for?
(Breakdown: Product, Team, GTM, Debt Closure, etc.)
 - How open are you for equity dilution? (Mention in %)
 - Have you raised funds before? (Details if yes)
 - Are you currently in talks with any investor
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AI Agent Role Here:

- Proactively explains each section via conversational UI
- Gives real-time examples & prompts (e.g. “Here’s how others answer this...”)
- Detects inconsistencies (e.g., raising ₹5 Cr with no GTM strategy)
- Suggests improvements and readiness tips at the end
- Real-time assistance with form fill, clarifications, and validations.

Decision Point: Based on responses, the system determines eligibility for direct investor outreach.

2. Document Upload & Virtual Data Room Setup

- **Document Checklist Provided Based on Profile**
- **Options to:**
 - Upload existing documents
 - Request assistance for document preparation
- **Virtual Data Room Auto-Creates the Following Folders:**
 - Pitch Deck
 - Financial Projections
 - Business Plan
 - One-Pager
 - Investment Teaser
 - Compliance & Certifications
 - Valuation Certificate
- **Resources Provided:**
 - Sample Templates for each resource
 - Upload Guidelines for each resource

AI Agent Integration: Automatically reviews uploads, suggests improvements, renames files, and sorts them into respective folders.

3. Strategic Diligence Phase

- User submissions are marked for review
- MyProBuddy Team reviews and checks for completeness

- Fit Check is carried out by checking the following metrics:

Audited / Un-audited financial statements along with groupings and trial balance.
Monthly management accounts (including detailed P&L, balance sheet, cash flow and variance analysis) for the historical period.
Reconciliation of the management accounts to the audited financial statements for the historical period.
Copies of internal audit reports, if any for historical period.
Organisation chart of the Company.
Revenues and margins
Month-on-month revenue by customer segment & key customers.
Monthly revenue by type of product plans and sales channel.
Monthly trend in revenue and number of orders from first time customers and repeat orders from existing customers.
Monthly segregation in number of customers into paid and unpaid customers.
Month on month media cost by type of media and any significant or long term commitments with media vendors.
Monthly details of advertising and promotion expenses and explain accounting for the same.
Details of party to whom professional services are paid with a short description of services received from the person.
Cost incurred in acquisition of a customer and accounting treatment of the same.
Human resources
Monthly trends in salaries, payroll tax, benefits, etc for the historical period.
Department-wise and grade wise manpower strength and costs bifurcated into own employees and contract manpower.
Pension and other retirement schemes including copies of rules, trust deeds, latest available accounts and any recent actuaries' reports.
Details regarding incentive compensation arrangements including fixed and variable components (including possible share option schemes and incentives based on the performance of the programmes/ movies).
Copy of contracts with key management personnel
Details of the number of employees with salary statement from the date of employment
Details of any benefit, pension, provident fund, gratuity etc provided to employees;
Copies of employment agreements
Net assets
Fixed assets and depreciation
Details of fixed assets by category (cost, depreciation, NBV)
Listing of assets (property and equipment) acquired on lease and lease agreements. Note on lease accounting.

Details of any capitalized intangible assets (including cost of technology development) and basis of accounting.
Details of components of capital work in progress with comment on expenditure incurred and commitments already made.
Accounts Receivable
General credit policies relating to the Company's customers including normal credit terms, extended payment terms and interest charged, if any and periodicity of obtaining confirmation.
Party-wise break-up of aged accounts receivable and subsequent receipts, if any and provision for doubtful debts, indicating reasons therefor.
Schedule of advances received from customers, if any specifying the date of receipt, amount and subsequent adjustment, if any.
Cash and bank
List of bank accounts and bank balances as at balance sheet date.
Details of the fixed deposit amounts providing the term of deposit, interest rates, name of authority if the same is deposited as security/margin money, etc.
Bank reconciliation statements for bank accounts .
Loans & advances and other current assets
Details of loans and advances balances (including prepaid expenses) with supporting documents at the historic balance sheet dates.
Ageing of balances outstanding, comment on recoverability/adjustment at the historic balance sheet dates.
Accounts payable and accrued liabilities
Listing of accounts payable balances (along with ageing) mentioning credit period offered by key suppliers
Details of leave pay and retirement benefit accruals.
Details of other liabilities and provisions
Share capital and reserves and debt
Shareholding structure of the company and recent changes made. Also provide details of potential dilution in the equity share capital.
Shareholder agreements
Agreements covering subscription, sale and/or purchase of shares or other securities
Schedule of borrowings along with key terms of the borrowings and copy of loan documents
Related party transactions
A list of related and affiliated companies/parties, specifying the extent and nature of the relationship with the Companies/parties and its management.
Provide details of transactions (e.g., sales, purchases, cash advances and loans to/from, etc) with each related and affiliated company in each period under review.
Particulars of any common costs, if any allocated between various related parties
Details of any commitments or obligations towards related and affiliated companies.

Contingent liabilities
Schedule of contingent liabilities including guarantees given (bank and corporate), claims against the company
Schedule of lease commitments and capital commitments
Tax matters (Income Tax, excise, customs, professional tax, service tax, GST and sales tax)
Copies of submitted tax returns of Income Tax, excise, customs, professional tax, service tax, GST
Copies of any material assessments and correspondence with the tax authorities, including details of returns that have not yet been agreed by the tax authorities
An analysis of all tax balances at the most recent year end and the income statement tax charges/credits
Copy of sample invoices and Tax deducted computations
Provide deferred tax calculation workings
Material Contracts
Sales, supply, distribution, manufacturing, research, consultancy, outsourcing, technology transfer and marketing agreements
Any contract covering details of all mortgages, security interests, liens, encumbrances or pledges, and any other charges or interest over assets or revenues of the Company and any group company
Copies of Registration Certificates of excise, customs, professional tax, service tax, GST (which ever is applicable)

- Users notified with status: “Under Review – Response within 24-48 Hours”

AI Agent Integration: Offers insights into missing documents or errors in submissions in real-time.

4. Dashboard Home View (Default after Company profile creation)

Core Dashboard Features:

- **Progress Tracker:** Visual representation of the user’s journey
 - **Data Room Access:** View and manage uploaded documents
 - **Grants Bot CTA:** Quick access to grants support
 - **Schedule a Call:** Calendar integration with VA
 - **Investor Outreach CTA:** Locked until approved
 - **Action Plan & Task Tracker:** Displaying all pending and completed milestones
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6. Unlocking Investor Outreach

Conditions for Unlocking:

- Complete documentation
- VA Approval
- Signed Success Fee Agreement (3-5%)

Features Unlocked:

- Email Templates
- Investor Buckets (categorized leads)
- AI-Powered Investor Recommendations
- Automated Outreach Campaigns
- Campaign Tracker (Sent / Opened / Replied / Negotiation)

AI Agent Integration: Personalizes follow-ups, writes emails, monitors investor engagement.

7. Deal Phase & Status Tracking

- Mock Pitch Option with Venture Analysts
 - Term Sheet Negotiation & Documentation
 - Final Status Options:
 - LIVE
 - CLOSED – WON
 - CLOSED – LOST
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8. Resources Center

- **Grants Bot:** Conversational AI guide for funding
 - **Preparation Resources:** Knowledge base with videos, blogs, documents
 - **Venture Partners:** List of assigned Analysts & Mentors
 - **Support Access:** Ticketing system and scheduling calls with the team
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Tech Stack & Automation

Component	Automation	Suggestion
Grants Bot	AI-Powered Chat	Trained on public/private grant data
Virtual Data Room	Auto-file sorting	Integrated with Google Drive/Notion
Task Tracker	Milestone system	Backend with Notion or Trello

Email Outreach	CRM + Email Sequences	SendGrid, MailerSend, or Outplay
Document Checker	GPT-Powered	Detects gaps, clarity issues
Investor Matchmaking	AI Engine	Matches users with suitable investors
