

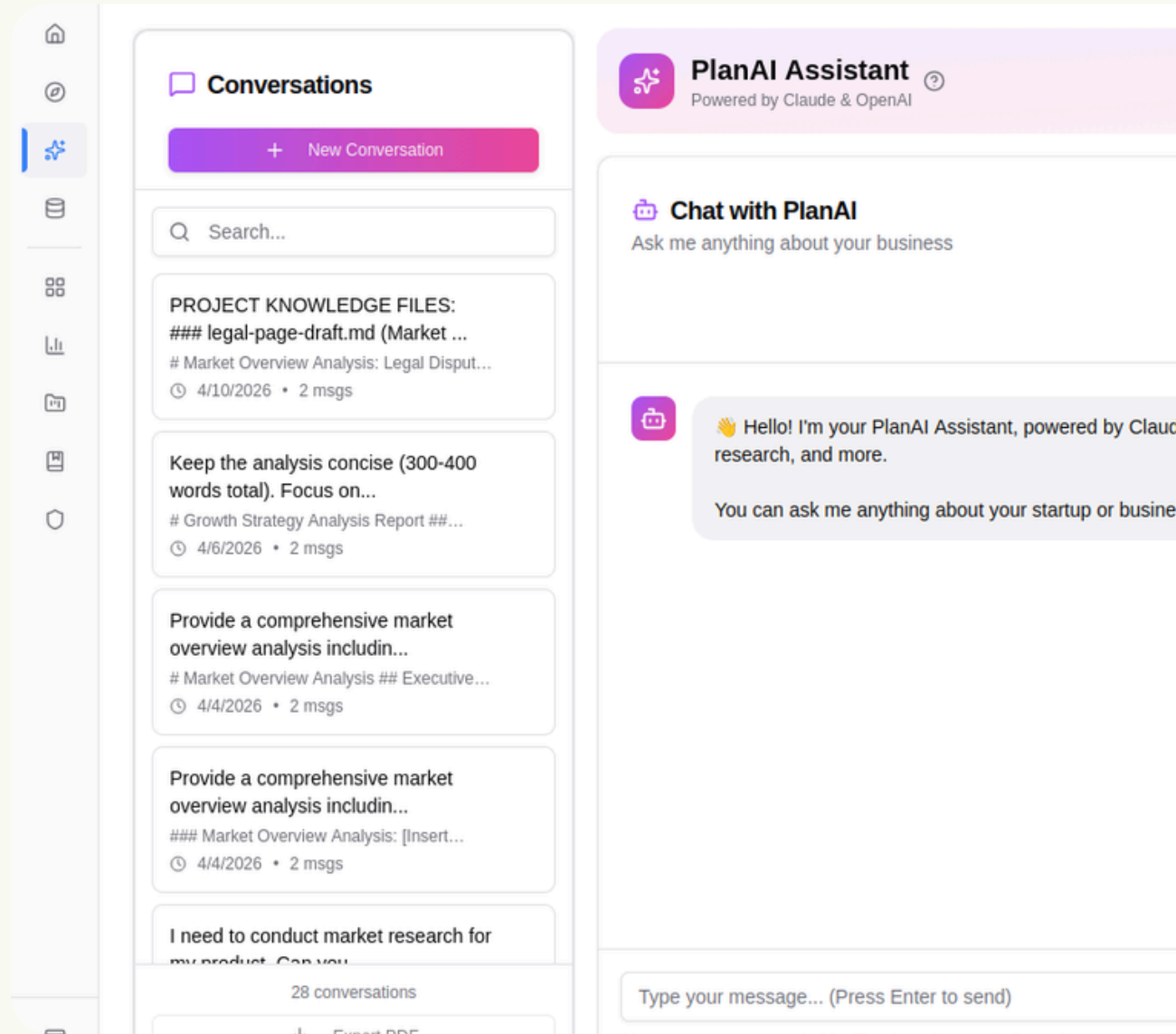


The AI agents that build
your business plan.

PlanAI

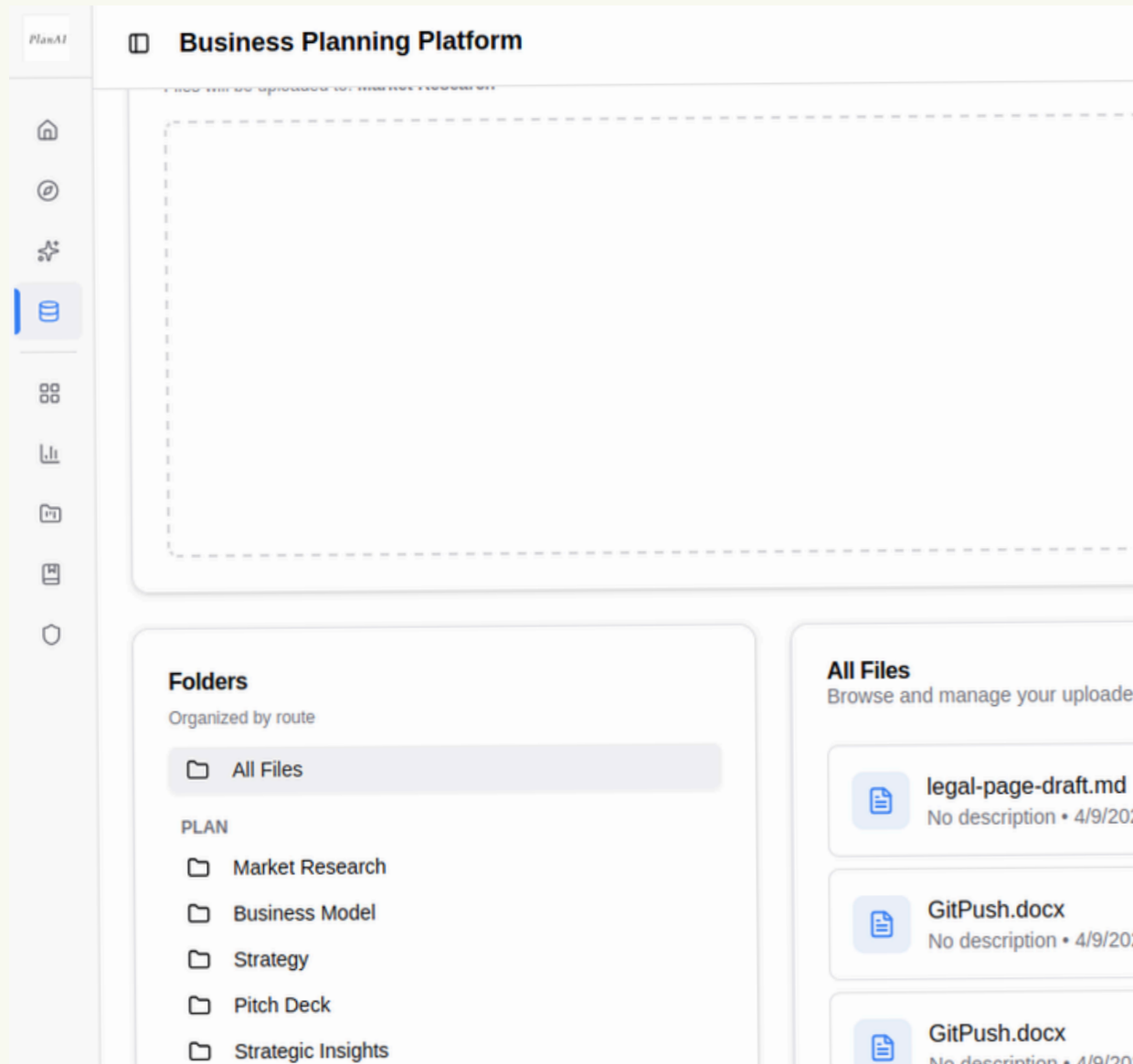
A conversational AI – that, well, just gets you.

Break the ice with
curated business
planning templates.



Train your AI's 'brain' with PlanAI's in-built AI repository

Assign files to folders and initiate a project repository. Train the planning agents with context, knowledge and relevancy of information.



The AI Agents intelligently analyze your strategy and devise a plan for your team to collaborate

The AI drafts your market research reports and distills them into clear to-dos to collaborate with your team

The screenshot displays a project management interface. On the left is a vertical sidebar with icons for home, search, list, grid, chart, calendar, and notifications. The main content area shows a list of tasks:

- The Q1 Summary highlights significant growth opportunities in the global e-commerce market, projected to leverage data analytics for better consumer insights.**
- 1. Develop Mobile Optimization Strategy**
Create a comprehensive plan to enhance mobile interfaces and payment options to improve user experience.
Owner: Product Development | Timeline: Next 4 weeks | Metric: Completion of mobile strategy document | Category: GT
- 2. Initiate Marketing Campaign for Asia-Pacific**
Launch targeted marketing efforts in Asia-Pacific and Latin America to increase brand awareness and engagement.
Owner: Marketing | Timeline: Next 6 weeks | Metric: Increase in website traffic from targeted regions by 20% | Category: GT
- 3. Implement Data Analytics Tools**
Adopt data analytics solutions to gather insights on consumer preferences and behaviors, enabling personalized marketing.
Owner: Data Analytics Team | Timeline: Next 8 weeks | Metric: Deployment of analytics tools and initial report generation
- 4. Conduct Consumer Behavior Survey**
Design and distribute a survey to gather data on consumer preferences and shopping habits to inform marketing strategy.
Owner: Market Research | Timeline: Next 3 weeks | Metric: Number of completed surveys (target: 500 responses) | Category: GT
- 5. Analyze Emerging Market Trends**
Research and analyze trends in emerging markets to identify specific opportunities for growth and tailor marketing strategies.
Owner: Market Research | Timeline: Next 5 weeks | Metric: Completion of trend analysis report | Category: validation

At the bottom of the task list, there is a blue button with a right-pointing arrow and the text "Push 5 tasks to Collaborate". Below this button, a note states: "Accepted tasks appear in the Collaborative Tasks workspace where you can assign owners, update status, and track completion."

At the bottom of the sidebar, there is a "Module Progress" section with the text: "Complete all sections to unlock achievements".

Build your pitch deck with AI and together with your team

Send an invitation for your team-member to collaborate, edit and save a pitch deck iteration for your next meeting

Pitch Deck Builder ⓘ
Create investor-ready presentations with AI-powered feedback

Pitch Deck | Saved Decks | AI Review

Default Pitch Deck | Owner | Live | 1 person viewing (MD)

Deck Progress
0 of 10 slides completed
0% complete

Pitch Deck Slides
Navigate through all 10 slides of your pitch deck

Mission | Problem | So...
Business Model | Competition | T...

1. Mission
Your why and vision
Mission

Build Financial Plans, Develop Three-Statement Models and Integrate with Accounting Software

Build a plan, work your plan with numbers

The screenshot displays a software interface for financial planning. On the left is a navigation sidebar with icons for home, search, settings, and other functions. The main content area is titled "Financials" and includes a menu with options: "Content" (Learning materials and resources), "Analysis" (highlighted), "Collaborate" (Collaborative financial planning), "Integrations" (Connect Google Sheets & QuickBoo), "Assignment" (Tasks and exercises), and "Upload Submission" (Submit your work). The "Analysis" section contains several tools: "Monthly Income Statement" (12-month P&L calculator), "Annual Proforma" (Annual financial summary), "Three Statement Model" (Income, Balance Sheet, Cash Flow), and "5-Year Forecast" (Multi-year projections). Below this is a "Financial Modeling" section with a description: "Build comprehensive financial projections from monthly details to 5-year forecasts." On the right side, there are additional panels: "Monthly Income" (Build comprehensive financial pro...), "Saved Scenarios", "Chart Downloads" (Download individual charts or all charts), and a "Revenue & Costs Breakdown" chart. The chart shows monthly revenue, COGS, and operating income, with a prominent orange bar reaching approximately \$36k.

Financials

- Content
Learning materials and resources
- Analysis**
- Collaborate
Collaborative financial planning
- Integrations
Connect Google Sheets & QuickBoo
- Assignment
Tasks and exercises
- Upload Submission
Submit your work

ANALYSIS TOOLS

- Monthly Income Statement**
12-month P&L calculator
- Annual Proforma
Annual financial summary
- Three Statement Model
Income, Balance Sheet, Cash Flow
- 5-Year Forecast
Multi-year projections

Financial Modeling
Build comprehensive financial projections from monthly details to 5-year forecasts.

Monthly Income
Build comprehensive financial pro...

Saved Scenarios

Chart Downloads
Download individual charts or all charts

Revenue & Costs Breakdown
Monthly revenue, COGS, and operatin...

Category	Value
Revenue	\$18k
COGS	\$2k
Operating Income	\$36k
Other	\$18k
Other	\$2k

Store your project files securely.

Store your files securely for all project plans, financial models and important documents with up to 25GB of storage space.

The screenshot displays a user interface for file storage. At the top, it shows the breadcrumb 'Documents / File Storage' and the title 'File Storage' with the subtitle 'Browse and manage your uploaded files'. Below this, two summary cards are shown: 'Total Files' with a value of 7 and a folder icon, and 'Storage Used' with a value of 92.2 KB. The 'Upload Files' section includes a blue 'Select File' button and text indicating supported file types: PDF, DOCX, TXT, CSV, XLSX, and Images (up to 50MB). The 'Folders' section allows organizing files into collections, with a '+ Folder' button and two active folders: 'All Files' (7 files) and 'Unassigned' (7 files). A search bar labeled 'Search files...' is also present. A sidebar on the left contains navigation icons for home, search, refresh, list, grid, bar chart, folder, document, and lock. At the bottom, there are icons for a list view and settings.

Documents / File Storage

File Storage

Browse and manage your uploaded files

Total Files **7**

Storage Used **92.2 KB**

Upload Files

Store documents in your personal file storage

[Select File](#) Supported: PDF, DOCX, TXT, CSV, XLSX, Images (up to 50MB)

Folders

Organize your files into collections [+ Folder](#)

All Files **7**

Unassigned **7**

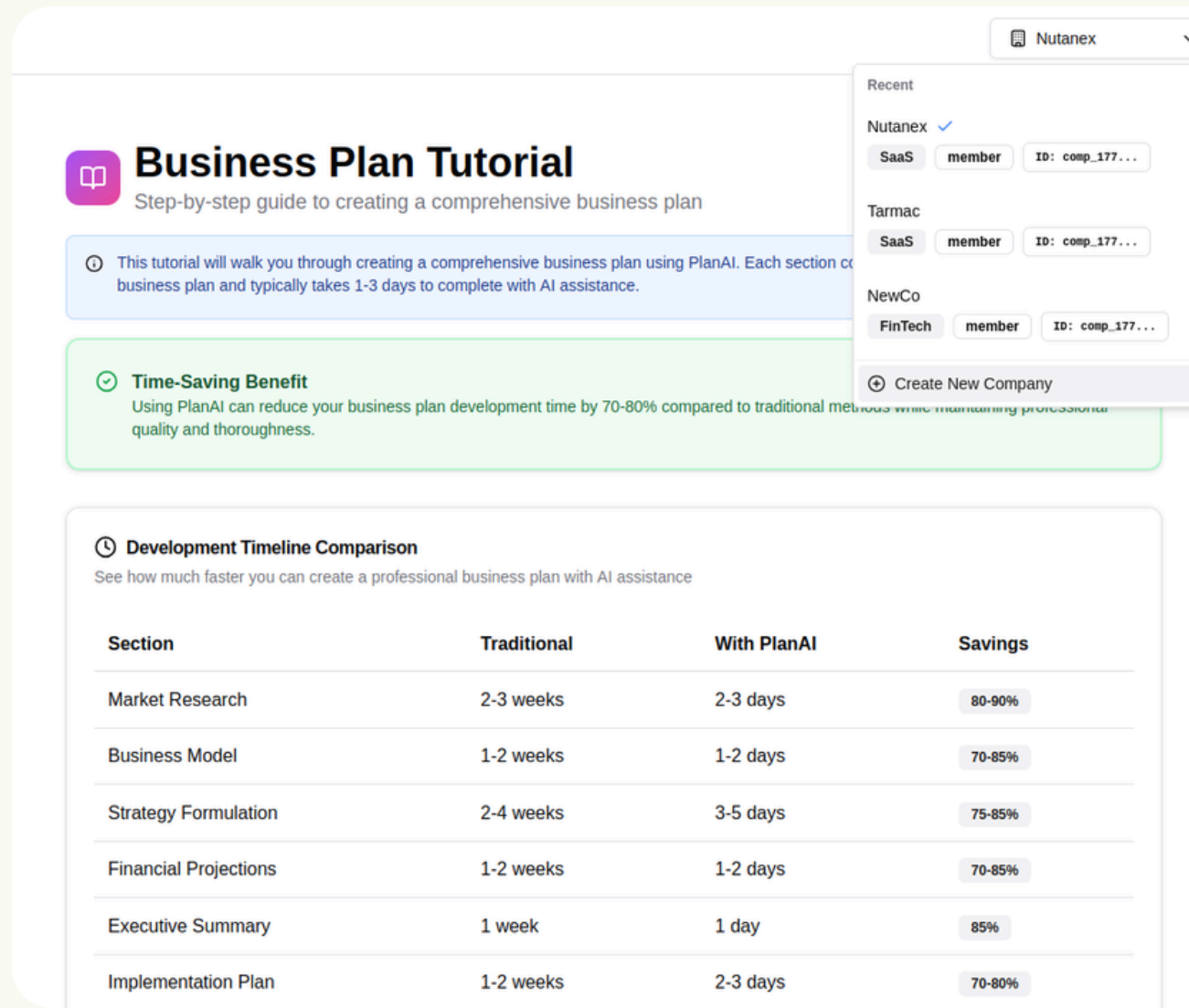
Create folders to group related files.

Search files...

All Files

Organize your business plans by line of business or incorporated entity

The company ID toggle provides perfect data isolation for the AI agents to personalize industry specific analysis and draft personalized todos and workplans



The screenshot shows a user interface for a business plan tutorial. At the top right, there is a dropdown menu for 'Nutanex' with a company ID toggle. The main content area features a 'Business Plan Tutorial' section with a step-by-step guide. Below this is a 'Time-Saving Benefit' section highlighting a 70-80% reduction in development time. At the bottom, a 'Development Timeline Comparison' table compares traditional methods with PlanAI assistance across various sections.

Recent

Nutanex ✓

SaaS member ID: comp_177...

Tarmac

SaaS member ID: comp_177...

NewCo

FinTech member ID: comp_177...

⊕ Create New Company

Business Plan Tutorial

Step-by-step guide to creating a comprehensive business plan

ⓘ This tutorial will walk you through creating a comprehensive business plan using PlanAI. Each section of the business plan and typically takes 1-3 days to complete with AI assistance.

✔ **Time-Saving Benefit**
Using PlanAI can reduce your business plan development time by 70-80% compared to traditional methods while maintaining professional quality and thoroughness.

⌚ Development Timeline Comparison

See how much faster you can create a professional business plan with AI assistance


Section	Traditional	With PlanAI	Savings
Market Research	2-3 weeks	2-3 days	80-90%
Business Model	1-2 weeks	1-2 days	70-85%
Strategy Formulation	2-4 weeks	3-5 days	75-85%
Financial Projections	1-2 weeks	1-2 days	70-85%
Executive Summary	1 week	1 day	85%
Implementation Plan	1-2 weeks	2-3 days	70-80%

Bring all your work together into the business planner, collaborate and delegate tasks

The agents intelligently suggest tasks to review with your team. Collaborate, plan sprints, and accomplish tasks together


Collaborative Tasks

Work together in real-time on strategic initiatives

 Collaborators (1 online)

 Connected - Changes sync in real-time

 Editable Grid

 Module View

 Monthly View

 Gantt View

Segmented by Module

View AI and manual tasks organized by workflow

Research & Insights 4 tasks

Launch Targeted Marketing Campaigns Apr 19

Initiate marketing campaigns specifically targeting consumers in Asia-Pacific and Latin America to drive e-commerce adoption in these regions.

Marketing

high

Implement Data Analytics Tools

Invest in data analytics tools to gather insights from marketing efforts.

Data Analytics Team

medium

Conduct Market Entry Analysis No date

Perform a detailed analysis of market entry strategies for emerging markets, focusing on potential barriers and opportunities.

Market Research

medium

Monitor E-commerce Growth Metrics

Establish a system to regularly track e-commerce trends.

Business Intelligence

low

Financials 5 tasks

Reduce Marketing Expenses No date

Cut marketing expenses by 20% to save \$1,000, reallocating funds to more effective channels.

Review Salary Structure

Conduct a review of salary allocations to ensure

Intelligent business AI co-pilot

PlanAI