ENTREPRENEURIAL FINANCE

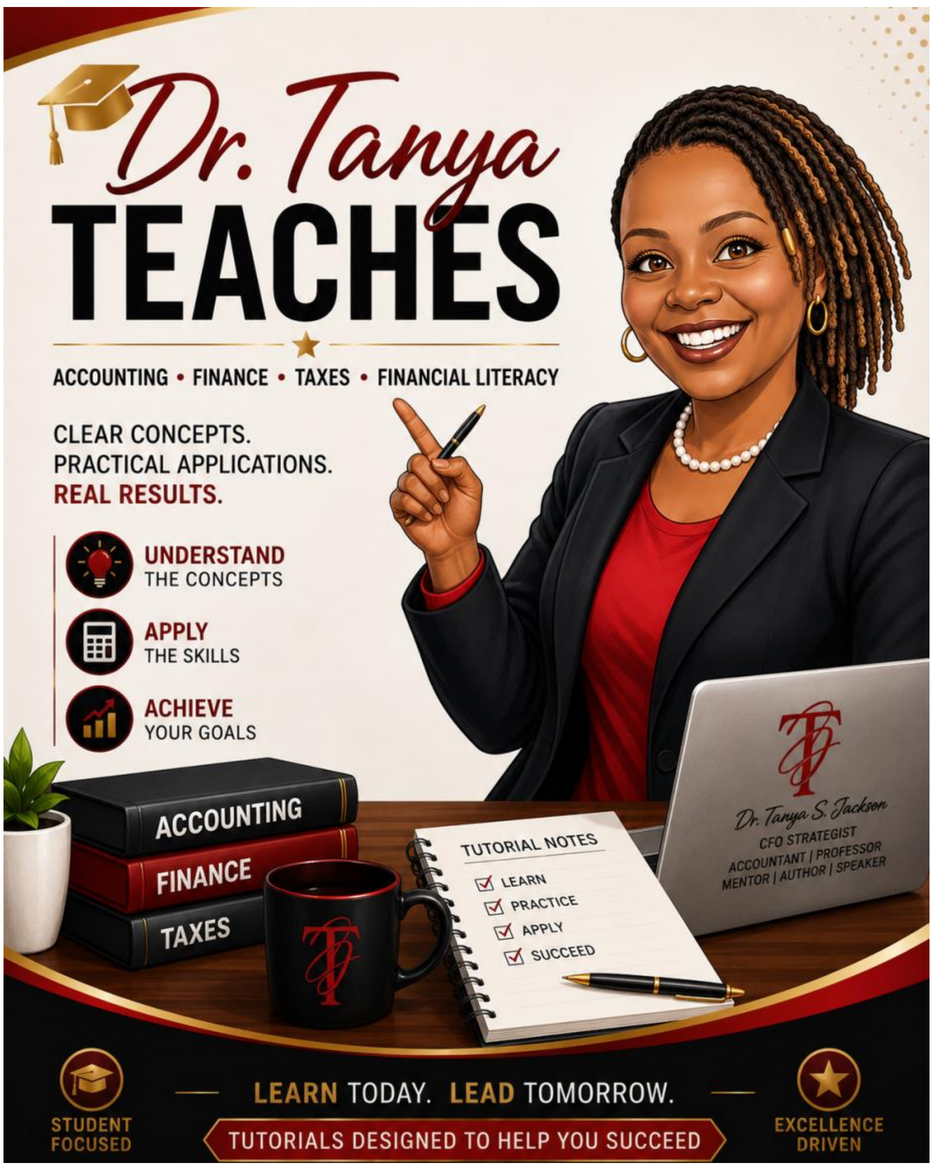
WEEK 7 | ENTREPRENEURIAL FINANCE UNIT WRAP UP

Guided Instruction Packet

Turn seven weeks of entrepreneurial finance learning into a practical plan for what happens next.

GUIDED INSTRUCTION PURPOSE
This packet supplements the Intuit for Education Entrepreneurial Finance course. Use it to reflect on the full unit, connect the financial decisions you made across Weeks 1-6, identify next steps, and build a practical Entrepreneurial Finance Action Plan.

Name: ____ Date: ____________________



How to Use This Packet

Complete the assigned Intuit classroom activities first or alongside this packet. Then use the explanations, examples, checkpoints, and business-owner applications here to deepen your understanding. Bring your questions and completed notes to the live guided instruction session.

Week 7 Learning Objectives

- Reflect on learning by identifying key takeaways from the Entrepreneurial Finance unit.
- Identify next steps to continue building entrepreneurial finance knowledge.
- Complete the 10-question Entrepreneurial Finance end-of-unit assessment.

Week 7 Roadmap

STEP	WEEK 7 ROADMAP
1	Review My Entrepreneurial Finance Portfolio
2	Identify What Still Needs Validation
3	Choose My Top Three Financial Priorities
4	Build a 30-60-90 Day Action Plan
5	Choose Five Numbers and One Financial Habit
6	Build My Entrepreneurial Finance Action Plan

Think Like an Entrepreneur

Entrepreneurial finance becomes valuable when learning changes decisions and decisions become action. This final week is your opportunity to review the financial choices you made throughout the program, identify what still needs validation, and decide what you will do next.

1. Review the Financial Decisions You Have Made

Over the past six weeks, you have built a connected financial decision framework for your business. Review your business profile, financial model, ROI decision, financing strategy, financial controls and risk plan, and business value and exit strategy. Look for decisions that reinforce one another, assumptions that still need evidence, and areas that require revision.

PORTFOLIO DECISION	OWNER REVIEW
Business profile & financial model	Do the business model and numbers still make sense?
ROI & financing	Are my investment and funding decisions aligned?
Controls, risk & value	Can the business operate responsibly and build long-term value?

Checkpoint 1

Which decision from Weeks 1-6 has the greatest influence on what you should do next, and why?

Answer:

2. Identify What Still Needs Validation

A business plan is built on assumptions until actual results confirm or challenge them. Identify the numbers, customer behaviors, costs, financing terms, operating risks, or market conditions that still need validation. Strong entrepreneurs do not treat an estimate as a fact. They decide what information must be tested and how they will obtain it.

AREA TO VALIDATE	EXAMPLE	OWNER QUESTION
Customer economics	CAC, CLTV, pricing, demand	What actual data do I still need?
Cash & financing	Cash needs, payment timing, debt capacity	Can the business support the plan?
Operations & risk	Controls, processes, owner dependence	What could prevent execution?

Checkpoint 2

What is the most important financial assumption in your business concept that still needs to be validated?

Answer:

3. Turn Learning Into Financial Priorities

Not every improvement can happen at once. Select the three financial priorities that will have the greatest effect on the health, growth, and long-term value of your business. Priorities should be specific enough to guide action and should connect directly to the financial decisions you developed during the program.

Your priorities should reflect what the business needs next, not simply what is easiest to complete.

Guided Example: From Course Decision to Business Priority

An entrepreneur discovers that the business has attractive customer economics but weak cash-management routines and limited financial records. Instead of immediately pursuing new financing, the owner prioritizes a monthly cash forecast, consistent transaction recording, and a documented receivables process. The course concepts become an operating agenda.

PRIORITY AREA	WHAT IT MEANS	ACTION FOCUS	OWNER QUESTION
Financial performance	Strengthen the economics of the business	Revenue, margin, cash, ROI	Which number needs improvement first?
Financial discipline	Build reliable financial routines	Budgeting, controls, records	Which routine must become consistent?

A useful priority identifies both the financial issue and the action needed to improve it.

Think Like an Entrepreneur

Financial decisions should be monitored with evidence. Choose measures that help you determine whether the business is performing as expected. Revenue alone is not enough. Depending on the business, useful measures may include cash balance, gross margin, break-even sales, customer acquisition cost, customer lifetime value, ROI, receivables, debt obligations, or another decision-relevant metric.

4. Build a 30-60-90 Day Action Plan

Convert your top priorities into a practical timeline. The 30-day period should emphasize immediate setup, validation, or corrective action. The 60-day period should build consistency and produce information you can review. The 90-day period should evaluate results and determine what needs to continue, change, or expand.

TIMEFRAME	PRIMARY PURPOSE	EXAMPLE ACTION	OWNER QUESTION
30 Days	Start or correct	Set up cash forecast or validate a key assumption	What can I do immediately?
60 Days	Build consistency	Review results and strengthen a financial routine	What should be operating consistently?
90 Days	Evaluate and adjust	Compare results to plan and revise the next priority	What evidence will guide my next decision?

A strong action plan identifies what will happen, when it will happen, and what evidence will show whether progress is being made.

Checkpoint 3

What is one action you can realistically complete in the next 30 days that would strengthen your financial decision-making?

Answer:

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5. Choose the Numbers and Habits That Will Keep You on Track

ACTION-PLAN ELEMENT	QUESTION TO ASK
Top three priorities	What matters most now?
30-60-90 actions	What will I do and by when?
Five numbers	Which measures will tell me how the business is performing?
Professional support	Where do I need accounting, tax, legal, lending, or other expertise?
Financial habit	What routine will keep me engaged with the numbers?

Think Like an Entrepreneur

Your completed portfolio should become a working financial decision framework, not a document you put away after the program. Choose five numbers that matter most to your business, decide how often you will review them, identify professional support you may need, and commit to one financial habit that will keep you connected to the financial health of the business.

6. Build My Entrepreneurial Finance Action Plan

Use your completed portfolio to decide what happens next. Review the decisions you made during Weeks 1-6, choose your top three priorities, build a 30-60-90 day action plan, identify the numbers you will monitor, and commit to a financial habit that supports disciplined decision-making.

What are the three most important financial takeaways from this program?

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Which prior portfolio decision is strongest and ready for action?

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Which prior decision or assumption needs the most validation?

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What is Financial Priority #1?

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What is Financial Priority #2?

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What is Financial Priority #3?

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What will I complete in the next 30 days?

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What will I complete or review by 60 days?

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What will I evaluate, improve, or expand by 90 days?

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Which five financial numbers will I monitor consistently?

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How often will I review these numbers?

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What professional support or expertise do I need?

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What one financial habit will I commit to maintaining?

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My Entrepreneurial Finance Action Plan

◻ PRIORITIZE ◻ ACT ◻ MONITOR ◻ ADJUST

My first action after completing this program will be:

Knowledge Check

1. Why is it important to review prior financial decisions before deciding what to do next?

Response:

2. What is the difference between an assumption and a validated business result?

Response:

3. Why should an entrepreneur limit the action plan to a few high-priority financial objectives?

Response:

4. How can a 30-60-90 day plan improve accountability and financial decision-making?

Response:

5. Why should entrepreneurs monitor a small set of decision-relevant financial measures consistently?

Response:

Prepare for Live Guided Instruction

□ Complete the assigned Week 7 Intuit review and end-of-unit activities.

□ Bring your completed or updated portfolio sections from Weeks 1-6.

□ Identify the three financial priorities that matter most for your business right now.

□ Be prepared to discuss the first action you will take after the program.

Professional Takeaway

Entrepreneurial finance is the discipline of using financial information to make informed decisions about how a business earns, spends, invests, borrows, protects, grows, and creates value. Financially strategic entrepreneurs use their numbers to decide what happens next.

Dr. Tanya Challenge

- Which financial decision from this program will have the greatest impact on your business?
- What will you accomplish in the next 30, 60, and 90 days?
- What financial habit will you maintain after the program ends?

Week 7 | One-Page Memory Guide

Use this page as your final program review and as a reminder to keep turning financial information into action.

REMEMBER	MEANING	OWNER QUESTION
Reflection	Identify what the unit changed or clarified	What are my most important takeaways?
Validation	Test assumptions with evidence	What do I still need to prove?
Priority	A financial issue or opportunity that deserves action	What matters most right now?
30-60-90 Plan	A phased timeline for execution and review	What will I do next and when?
Financial Measures	Numbers used to monitor performance and decisions	Which five numbers should I watch?
Professional Support	Expertise needed to execute responsibly	Where do I need help?
Financial Habit	A repeatable behavior that supports discipline	What will I review consistently?
Action Plan	The bridge from learning to execution	What will I do next?

My Week 7 Notes

Keep learning. Keep practicing. Keep growing.