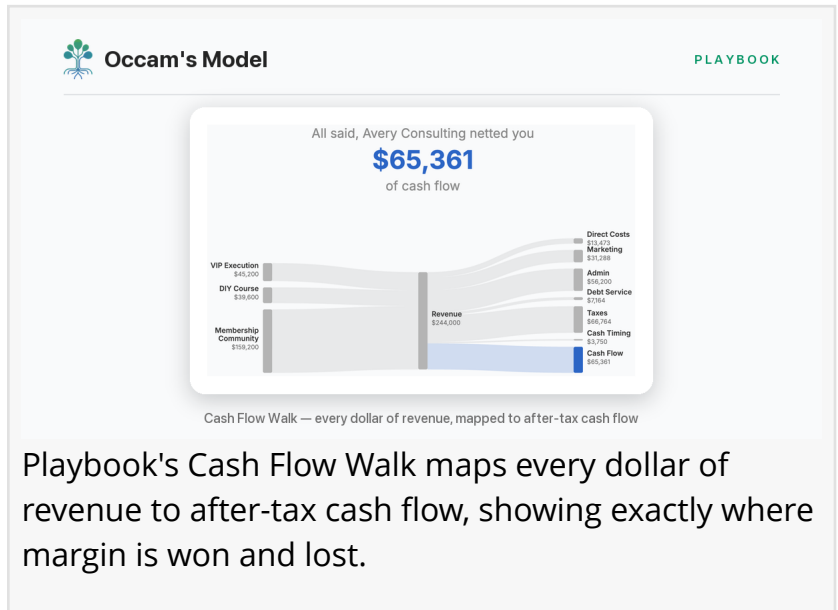


# New Platform Gives Small Business Owners Financial Clarity Without a CFO

*Occam's Model launches Playbook, a financial analysis tool that benchmarks small business performance and turns data into clear strategy.*

GREENWICH, CT, UNITED STATES, May 29, 2026 /EINPresswire.com/ -- Occam's Model today announced the launch of Playbook, a [financial planning and analysis platform](#) built for small business owners and self-employed entrepreneurs who need CFO-level strategies without the CFO price tag.



Designed for business owners generating revenue but managing their finances by instinct, Playbook brings institutional-grade financial analysis to the independent economy — translating raw business data into clear strategy, benchmarked performance metrics, and prioritized action plans.

“

Small business owners make financial decisions every day without the tools larger companies take for granted. Playbook gives them the clarity to see their numbers and know what to do about it.”

*Joao Galbier, Founder,  
Occam's Model*

## The Problem Playbook Solves

Most small business owners know their revenue. Few understand what happens to every dollar between the top line and their bank account. Traditional accounting software tracks transactions. Financial advisors are expensive. The gap between "I have a bookkeeper" and "I have a CFO" is where most small business financial decisions get made blindly.

Playbook closes that gap.

## How It Works

Users complete a guided intake covering revenue streams, cost of goods sold, marketing spend,

operating expenses, capital expenditures, debt, and working capital. From that data, Playbook generates three outputs:

**Cash Flow Walk** — An animated, line-by-line breakdown showing how each dollar of revenue flows to after-tax cash, revealing exactly where margin is lost and why. Accompanied by interactive deep dives for every item.

**Scorecard** — Industry-benchmarked scoring across filtered financial metrics, comparing the business against real peer data and identifying which parts of the business are underperforming.

**Plays** — AI-powered scenario modeling targeting the lowest-scoring metrics, with step-by-step recommendations and a side-by-side financial forecast showing projected impact before any change is made.

The result is the kind of financial strategy session that typically costs thousands in consulting fees — delivered in under an hour, on the business owner's schedule.

Built by a Finance Professional Who Learned to Code

Occam's Model was founded by Joao Galbier, a former investment banker and investor with over six years of financial advisory and management experience on Wall Street. Frustrated by the gap between institutional financial tools and what was available to small business owners, the founder taught himself software development to build the platform from the ground up.

"Small business owners make financial decisions every day without the analytical infrastructure that larger companies take for granted. Playbook is what happens when you take the rigor of a private equity firm and rebuild it for micro and small businesses."

Also Available: Blueprint

For entrepreneurs still in the planning phase, Occam's Model also offers Blueprint — a [business modeling tool](#) that builds personalized 24-month financial projections for new ventures and maps the income a business must generate to achieve financial independence.

Availability

Playbook is available now at [www.occamsmodel.com/our-method/playbook](http://www.occamsmodel.com/our-method/playbook). Cash flow walk, scorecard preview, and non-AI plans are available or free, no card required; deep dives, full benchmarking, and AI-powered Plays are included in the full plan.

About Occam's Model

Occam's Model is a [financial clarity platform for small business owners](https://www.occamsmodel.com) and entrepreneurs. By combining institutional financial modeling with purpose-built software, Occam's Model gives independent business owners the tools to understand their numbers, benchmark their performance, and build better financial strategy. Visit [www.occamsmodel.com](https://www.occamsmodel.com).

Joao Galbier

Occam's Model

+1 203-212-8342

[support@occamsmodel.com](mailto:support@occamsmodel.com)

Visit us on social media:

[LinkedIn](#)

[Instagram](#)

[Facebook](#)

[YouTube](#)

[TikTok](#)

[X](#)

---

This press release can be viewed online at: <https://www.einpresswire.com/article/914369390>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2026 Newsmatics Inc. All Right Reserved.