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# Executive Summary

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# Market Analysis

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## Market Size

Cagr: 14.5 · Current: \$4.2 billion · Projected: \$12.8 billion by 2030

## Step 2 - Market Position

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Mode: investor

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts. Total Steps: 18

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Problem: First-time founders and corporate innovators suffer from 'false confidence' (building things nobody wants) and 'analysis paralysis' (getting stuck in research mode). Existing tools are disconnected; Trello manages tasks but doesn't validate ideas, while consultants are expensive and slow. There is no centralized, cost-effective solution that bridges the gap between a rough napkin sketch and an investor-ready business plan.

Value proposition: Unlike generic business plan templates or static checklists, this platform functions as an active co-founder. It bridges the gap between ideation and execution by turning subjective brainstorming into objective, data-backed validation scores. By offering a seamless transition from a 'quick check' to a 'comprehensive investor deck,' it eliminates the friction of starting over and significantly reduces the time and cost associated with traditional market research.

Target market: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Market Position

### Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

### Competitors

- Project Management Tools (Trello, Asana, Notion)
  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
  - Weaknesses: Passive repositories that require users to generate their own insights., No mechanism to validate if the tasks being completed are the \*right\* tasks., Cannot generate financial models or assess market viability objectively.
  - Market Share: Dominant in workflow organization, but 0% share in automated validation.
  - What They Charge: Freemium to ~\$20/user/month

- Traditional Consultants & Agencies
  - Strengths: Provide high-touch, human expertise and custom strategic guidance., Credibility and trust associated with established professional firms., Can offer nuanced, industry-specific advice.
  - Weaknesses: Prohibitively expensive for early-stage founders (often \$10k+ per engagement)., Slow turnaround times (weeks/months) which kills startup momentum., Opacity of process; founders often become dependent rather than empowered.
  - Market Share: Niche, serving well-funded entities only.
  - What They Charge: \$5,000 - \$50,000+ per project
- Generative AI Wrappers (ChatGPT, Claude)
  - Strengths: Instant access to general knowledge and brainstorming capabilities., Extremely low cost (free to low subscription fees)., Rapidly improving text generation capabilities.
  - Weaknesses: Lack specialized architecture for due diligence (no 'Deep Dive' mode)., Prone to 'hallucinations' and lack of data fidelity without API integration., Require high prompt engineering skill to get investor-grade output.
  - Market Share: Generic tool usage.
  - What They Charge: \$0 - \$20/month

## Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
  - Investor Framing: We don't just organize the work; we qualify the work. By automating the validation process, we act as an active co-founder, ensuring resources are only spent on viable opportunities.
- 2.
  - Claim: Zero-Mile Investor Readiness
  - Evidence: The 'Fundraising Readiness Room' transforms validated data directly into pitch decks and narratives, bridging the gap between 'napkin sketch' and 'investor-ready'.
  - Investor Framing: We compress the time-to-raise by converting validated market data into investor assets instantly. This solves the 'last mile' problem where founders have data but don't know how to sell it.
- 3.
  - Claim: Enterprise-Grade Validation at Startup Speed
  - Evidence: Offers the depth of a consultant's report (Deep Dive mode) at a SaaS price point, with a '5-Minute Sprint' for rapid hypothesis testing.
  - Investor Framing: We democratize access to high-end due diligence. We offer a 10x cost advantage over consultants while providing significantly higher analytical rigor than a blank canvas.
- Switching Barriers: Founder Ego: Founders are emotionally attached to their ideas and may resist objective data suggesting their concept is weak., Trust in AI Output: Convincing users that an automated platform can perform due diligence as rigorously as a human expert., Workflow Disruption: Moving from a loose collection of notes and chats to a structured validation platform requires a behavioral shift from 'chaos' to 'process'.
- Existing Customer Tools: Trello / Asana / Jira (for task tracking), Microsoft Excel / Google Sheets (for financial modeling), ChatGPT / Claude (for brainstorming), Figma / PowerPoint (for pitch deck design), Consultants / Agencies (for market validation)
- Competitive Landscape Summary: The market is currently bifurcated between cheap, passive organizational tools (Trello/Notion) and expensive, slow human services (Consultants). There is a massive gap in the middle for intelligent, automated validation. While generic AI (ChatGPT) is a threat, it lacks the specialized structure and API integrations to provide reliable, investor-grade due diligence. Our platform

captures this gap by offering the rigor of a consultant at the speed of software. The primary risk is not competition, but user adoption of AI-driven objectivity over human intuition.

## Business Overview

- Current Stage: idea
- Pain Severity: need-to-have
- Traction Summary: Currently in the concept phase with a defined technical architecture and feature set. The founder has identified a clear product roadmap including a modular dual-mode engine and specific API integrations (SEO, App Store) to enhance data fidelity. The strategy is currently focused on validating the core value proposition before full-scale development.
- Customer Evidence: The business concept addresses a validated market gap where existing tools (Trello, Asana) and service providers (Consultants) fail to meet the needs of solo founders and SME innovators. The proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback from early users to confirm product-market fit before committing to heavy AI engineering costs.
- Problem Statement: Early-stage founders face a critical 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current solutions are broken: project management tools like Trello organize tasks but don't validate viability, while hiring consultants or agencies is too costly and slow for pre-revenue teams. There is no centralized, cost-effective mechanism to objectively score an idea's potential before investing significant capital.
- Investor Narrative: Every investor knows the #1 reason startups fail: building something nobody wants. For the solo founder or corporate innovator, the journey from 'idea' to 'venture-backed' is a minefield of expensive guesswork and disconnected tools. They either suffer from 'false confidence,' building in a vacuum, or 'analysis paralysis,' stuck in research mode with no clear path forward. They don't need another to-do list; they need a system that tells them if the to-do list is even worth doing.

Our platform is the first AI-powered 'Chief of Staff' designed to solve this. We don't just organize tasks; we validate the business itself. Through a dual-mode engine, founders can run a rapid '5-Minute Sprint' to test a hypothesis, or trigger a 'Deep Dive' to auto-generate investor-grade financial models, competitor landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

- Solution Description: A virtual 'Chief of Staff' SaaS platform that automates the due diligence process. It operates on a dual-mode engine: a '5-Minute Sprint' for rapid, Lean hypothesis testing, and a 'Deep Dive' mode that autonomously generates comprehensive validation reports, financial models, and competitor landscapes. Crucially, the platform features a 'Fundraising Readiness Room' that transforms this validated data directly into investor-ready pitch decks and narratives. By using a model-agnostic backend, the system ensures high-quality, objective output, effectively acting as an active co-founder that guides the user from 'napkin sketch' to 'investor-ready' in a fraction of the traditional time.

## Step 2 - Six Pillar Validation

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### Reasoning

- **Stickiness:** The platform scores a 6 due to a retention paradox. While the 'Deep Dive' creates high switching costs during active use, the core user behavior is transient: founders validate to kill or launch ideas. Once an idea is validated (or killed), the user has little reason to return until they have a new idea, resulting in a 'stop-and-go' usage pattern rather than daily embedded workflow integration.
- **Uniqueness:** The concept scores a 7 because it aggregates existing Lean Startup methodologies into a specific, automated workflow. While individual components (pitch deck generators, AI checklists) exist, the 'Dual-Mode' engine (Sprint vs. Deep Dive) combined with a standardized validation framework is a novel application of AI. It is not a first-to-market invention, but a unique packaging of solutions to a specific problem.
- **Growth Trend:** This scores a 9 due to massive tailwinds. The 'Solo-preneur' and 'Creator Economy' markets are exploding. Simultaneously, the demand for 'Co-pilot' software that bridges the gap between human creativity and AI execution is at an all-time high. The shift from traditional consulting to automated AI validation represents a fundamental market change.
- **Pricing Sales:** A score of 5 reflects the challenge of monetizing the primary target audience. 'Wantrepreneurs' often lack funds and expect free tools. While the value proposition is strong (saving thousands in consulting fees), the willingness to pay is low. Sales will require high-volume freemium strategies to convert enough paying users to sustain the business.
- **Upsell Potential:** Scores a 7 because the product naturally lends itself to a value ladder. Users start with a free '5-Minute Sprint' (hook), move to paid 'Deep Dive' validation (core product), and can be upsold on premium pitch deck design services, ongoing 'tracker' subscriptions, or enterprise licenses for incubators. The progression from Y}YG to investment-ready creates clear expansion revenue.
- **Customer Purchasing Power:** Scores a 4 because the primary user base (Solopreneurs/Micro-SaaS) typically has very limited budgets and high price sensitivity. They are often bootstrapping. While the secondary market (SME Innovation Teams) has more money, they are harder to acquire and sell to compared to the mass market of individual founders.

**Risk Factors:** High churn risk due to 'one-and-done' utility; users may validate an idea and leave immediately., Target audience (Solopreneurs/Wantrepreneurs) is notoriously price-sensitive and has high business failure rates., LLM hallucinations could provide 'false confidence' with convincing but inaccurate market data., Competition from established players (Canva, ChatGPT) moving into the business strategy space.

**Overall Score:** 6.55

**Recommendations:** Shift the business model from 'Validation Tool' to 'Execution Tracker' to increase retention., Implement a 'Success-Based' pricing model (e.g., pay for the pitch deck export) to mitigate user price sensitivity., Integrate 'Live' market data sources (e.g., Google Trends API, SEMRush) to differentiate from generic LLM wrappers., Create a 'Cohort Mode' for incubators to increase B2B enterprise revenue and improve Customer Purchasing Power score.

**Detailed Analysis:** Good. The idea shows promise with some areas requiring attention. I will now perform a comprehensive 6-pillar validation based on the provided business consultant's report.

### Validation Scores

- Stickiness: 6
- Uniqueness: 7
- Growth Trend: 9
- Pricing Sales: 5



- Upsell Potential: 7
- Customer Purchasing Power: 4

## Step 3 - Team Snapshot

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Mode: investor

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts. Total Steps: 18

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## Team Snapshot

### Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

### Key Hires

- 1.
  - Role: CTO / Lead Engineer
  - Filled: No
  - Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No

- Critical Gap: Yes

## Advisory Board

- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:
  1. Founder names, current roles, and ownership splits.
  2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
  3. Prior startup outcomes (exits, failures, or lessons learned).
  4. Documented role agreements and vesting schedules (critical for early-stage trust).
  5. Identified critical hires (e.g., Technical Lead) and their target start dates.
  6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes
- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

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# Step 4 - Feature Outline

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Mvp Features: User Authentication & Onboarding, Model-Agnostic Backend, 5-Minute Sprint Engine, 6-Pillar Deep Dive Generator, Financial Modeling Engine, Fundraising Readiness Room

## Core Features

- 5-Minute Sprint Engine
  - Priority: critical
  - Description: An interactive guided workflow that forces users to articulate a core hypothesis, target audience, and unique value proposition. It uses AI to critique these inputs against Lean Startup principles within a strict 5-minute timeframe, delivering a 'Go/No-Go' feasibility score to combat analysis paralysis.
  - Dependencies: User Authentication, Model-Agnostic Backend
- 6-Pillar Deep Dive Generator
  - Priority: critical
  - Description: An autonomous agent that performs comprehensive validation across six key business areas (Market Size, Competitor Analysis, User Personas, Problem-Solution Fit, Unit Economics, Regulatory Risks). It scrapes live web data and synthesizes it into a single, investor-grade validation report.
  - Dependencies: Model-Agnostic Backend, 5-Minute Sprint Engine
- Fundraising Readiness Room
  - Priority: critical
  - Description: A dedicated workspace that auto-generates pitch decks, investor narratives, and financial summaries based on data validated in the 'Deep Dive'. It ensures consistency between the validation report and the final pitch materials, eliminating the need to copy-paste content manually.
  - Dependencies: 6-Pillar Deep Dive Generator, Financial Modeling Engine
- Financial Modeling Engine
  - Priority: critical
  - Description: A specialized module that converts qualitative business assumptions into quantitative financial projections (P&L, Cash Flow, Burn Rate). Unlike generic text generators, this uses structured logic to ensure math is valid for investor scrutiny.
  - Dependencies: 6-Pillar Deep Dive Generator
- Model-Agnostic Backend (Router)
  - Priority: critical
  - Description: The technical infrastructure allowing the platform to swap between different LLMs (e.g., GPT-4o, Claude 3.5 Sonnet, Llama 3) based on the specific task. It routes creative tasks to models with high temperature and analytical tasks to models with high reasoning capabilities to optimize cost and output quality.
- Competitor Landscape Visualizer
  - Priority: high
  - Description: A dynamic 2D matrix plotting competitors based on market positioning and feature sets. It pulls data from the Deep Dive research to visually identify 'Blue Ocean' opportunities for the user's startup.
  - Dependencies: 6-Pillar Deep Dive Generator
- Progress Tracking & Idea Vault

- Priority: high
- Description: A dashboard allowing users to save multiple 'Sprints' or 'Deep Dives'. Users can track the evolution of their ideas over time, compare different hypothesis iterations, and archive failed concepts for future reference.
- Dependencies: User Authentication, 5-Minute Sprint Engine
- Interactive Hypothesis Tracker
  - Priority: high
  - Description: A feature that allows users to update their initial assumptions based on real-world feedback. The system re-runs the validation logic on the updated data to show how the 'Validation Score' trends over time, essential for the Build-Measure-Learn loop.
  - Dependencies: 5-Minute Sprint Engine
- Export & Share Functionality
  - Priority: medium
  - Description: Capabilities to export the 6-Pillar report and Pitch Deck into PDF, PPTX, or shareable live web links. This is crucial for solopreneurs presenting to partners or incubators submitting work to cohorts.
  - Dependencies: Fundraising Readiness Room, 6-Pillar Deep Dive Generator
- Incubator Cohort Mode
  - Priority: medium
  - Description: A multi-seat dashboard view for Accelerators and Incubators to manage and review the progress of their cohorts. Allows admins to see aggregate scores and compare the validation status of multiple startups simultaneously.
  - Dependencies: Progress Tracking & Idea Vault, Role-Based Access Control
- Smart Narrative Builder
  - Priority: medium
  - Description: An AI writing assistant that specifically refines the 'story' aspect of the pitch deck. It suggests emotional hooks and narrative arcs based on the founder's 'Why' and the validated problem data.
  - Dependencies: Fundraising Readiness Room
- Integration Hub (No-Code/API)
  - Priority: low
  - Description: API connections to pull data from external tools (e.g., Google Analytics for landing page validation, Stripe for early revenue data) to feed into the Financial Modeling engine.
  - Dependencies: Financial Modeling Engine

Future Features: Investor Matchmaking Algorithm, Automated Lean Canvas Generator, Co-founder Personality Matcher, Grant & B2B Loan Database Integration, VR/AR Market Visualization Tool



# Step 4 - Feature Outlining

---

Mvp Features: User Authentication & Onboarding, Model-Agnostic Backend, 5-Minute Sprint Engine, 6-Pillar Deep Dive Generator, Financial Modeling Engine, Fundraising Readiness Room

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  - Description: An autonomous agent that performs comprehensive validation across six key business areas (Market Size, Competitor Analysis, User Personas, Problem-Solution Fit, Unit Economics, Regulatory Risks). It scrapes live web data and synthesizes it into a single, investor-grade validation report.
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  - Priority: critical
  - Description: A dedicated workspace that auto-generates pitch decks, investor narratives, and financial summaries based on data validated in the 'Deep Dive'. It ensures consistency between the validation report and the final pitch materials, eliminating the need to copy-paste content manually.
  - Dependencies: 6-Pillar Deep Dive Generator, Financial Modeling Engine
- Financial Modeling Engine
  - Priority: critical
  - Description: A specialized module that converts qualitative business assumptions into quantitative financial projections (P&L, Cash Flow, Burn Rate). Unlike generic text generators, this uses structured logic to ensure math is valid for investor scrutiny.
  - Dependencies: 6-Pillar Deep Dive Generator
- Model-Agnostic Backend (Router)
  - Priority: critical
  - Description: The technical infrastructure allowing the platform to swap between different LLMs (e.g., GPT-4o, Claude 3.5 Sonnet, Llama 3) based on the specific task. It routes creative tasks to models with high temperature and analytical tasks to models with high reasoning capabilities to optimize cost and output quality.
- Competitor Landscape Visualizer
  - Priority: high
  - Description: A dynamic 2D matrix plotting competitors based on market positioning and feature sets. It pulls data from the Deep Dive research to visually identify 'Blue Ocean' opportunities for the user's startup.
  - Dependencies: 6-Pillar Deep Dive Generator
- Progress Tracking & Idea Vault

- Priority: high
- Description: A dashboard allowing users to save multiple 'Sprints' or 'Deep Dives'. Users can track the evolution of their ideas over time, compare different hypothesis iterations, and archive failed concepts for future reference.
- Dependencies: User Authentication, 5-Minute Sprint Engine
- Interactive Hypothesis Tracker
  - Priority: high
  - Description: A feature that allows users to update their initial assumptions based on real-world feedback. The system re-runs the validation logic on the updated data to show how the 'Validation Score' trends over time, essential for the Build-Measure-Learn loop.
  - Dependencies: 5-Minute Sprint Engine
- Export & Share Functionality
  - Priority: medium
  - Description: Capabilities to export the 6-Pillar report and Pitch Deck into PDF, PPTX, or shareable live web links. This is crucial for solopreneurs presenting to partners or incubators submitting work to cohorts.
  - Dependencies: Fundraising Readiness Room, 6-Pillar Deep Dive Generator
- Incubator Cohort Mode
  - Priority: medium
  - Description: A multi-seat dashboard view for Accelerators and Incubators to manage and review the progress of their cohorts. Allows admins to see aggregate scores and compare the validation status of multiple startups simultaneously.
  - Dependencies: Progress Tracking & Idea Vault, Role-Based Access Control
- Smart Narrative Builder
  - Priority: medium
  - Description: An AI writing assistant that specifically refines the 'story' aspect of the pitch deck. It suggests emotional hooks and narrative arcs based on the founder's 'Why' and the validated problem data.
  - Dependencies: Fundraising Readiness Room
- Integration Hub (No-Code/API)
  - Priority: low
  - Description: API connections to pull data from external tools (e.g., Google Analytics for landing page validation, Stripe for early revenue data) to feed into the Financial Modeling engine.
  - Dependencies: Financial Modeling Engine

Future Features: Investor Matchmaking Algorithm, Automated Lean Canvas Generator, Co-founder Personality Matcher, Grant & B2B Loan Database Integration, VR/AR Market Visualization Tool

## Step 4 - Product Foundation

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Mode: investor

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts. Total Steps: 18

Initial\_idea: A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.

Problem: First-time founders and corporate innovators suffer from 'false confidence' (building things nobody wants) and 'analysis paralysis' (getting stuck in research mode). Existing tools are disconnected; Trello manages tasks but doesn't validate ideas, while consultants are expensive and slow. There is no centralized, cost-effective solution that bridges the gap between a rough napkin sketch and an investor-ready business plan.

Value proposition: Unlike generic business plan templates or static checklists, this platform functions as an active co-founder. It bridges the gap between ideation and execution by turning subjective brainstorming into objective, data-backed validation scores. By offering a seamless transition from a 'quick check' to a 'comprehensive investor deck,' it eliminates the friction of starting over and significantly reduces the time and cost associated with traditional market research.

Target market: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Team Snapshot

### Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

### Key Hires

- 1.
  - Role: CTO / Lead Engineer
  - Filled: No
  - Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No

- Critical Gap: Yes

## Advisory Board

- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:
  1. Founder names, current roles, and ownership splits.
  2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
  3. Prior startup outcomes (exits, failures, or lessons learned).
  4. Documented role agreements and vesting schedules (critical for early-stage trust).
  5. Identified critical hires (e.g., Technical Lead) and their target start dates.
  6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes
- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Market Position

### Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack

the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

## Competitors

- Project Management Tools (Trello, Asana, Notion)
  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
  - Weaknesses: Passive repositories that require users to generate their own insights., No mechanism to validate if the tasks being completed are the \*right\* tasks., Cannot generate financial models or assess market viability objectively.
  - Market Share: Dominant in workflow organization, but 0% share in automated validation.
  - What They Charge: Freemium to ~\$20/user/month
- Traditional Consultants & Agencies
  - Strengths: Provide high-touch, human expertise and custom strategic guidance., Credibility and trust associated with established professional firms., Can offer nuanced, industry-specific advice.
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  - Market Share: Niche, serving well-funded entities only.
  - What They Charge: \$5,000 - \$50,000+ per project
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  - Strengths: Instant access to general knowledge and brainstorming capabilities., Extremely low cost (free to low subscription fees)., Rapidly improving text generation capabilities.
  - Weaknesses: Lack specialized architecture for due diligence (no 'Deep Dive' mode)., Prone to 'hallucinations' and lack of data fidelity without API integration., Require high prompt engineering skill to get investor-grade output.
  - Market Share: Generic tool usage.
  - What They Charge: \$0 - \$20/month

## Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
  - Investor Framing: We don't just organize the work; we qualify the work. By automating the validation process, we act as an active co-founder, ensuring resources are only spent on viable opportunities.
- 2.
  - Claim: Zero-Mile Investor Readiness
  - Evidence: The 'Fundraising Readiness Room' transforms validated data directly into pitch decks and narratives, bridging the gap between 'napkin sketch' and 'investor-ready'.
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  - Investor Framing: We democratize access to high-end due diligence. We offer a 10x cost advantage over consultants while providing significantly higher analytical rigor than a blank canvas.

- **Switching Barriers:** Founder Ego: Founders are emotionally attached to their ideas and may resist objective data suggesting their concept is weak., Trust in AI Output: Convincing users that an automated platform can perform due diligence as rigorously as a human expert., Workflow Disruption: Moving from a loose collection of notes and chats to a structured validation platform requires a behavioral shift from 'chaos' to 'process'.
- **Existing Customer Tools:** Trello / Asana / Jira (for task tracking), Microsoft Excel / Google Sheets (for financial modeling), ChatGPT / Claude (for brainstorming), Figma / PowerPoint (for pitch deck design), Consultants / Agencies (for market validation)
- **Competitive Landscape Summary:** The market is currently bifurcated between cheap, passive organizational tools (Trello/Notion) and expensive, slow human services (Consultants). There is a massive gap in the middle for intelligent, automated validation. While generic AI (ChatGPT) is a threat, it lacks the specialized structure and API integrations to provide reliable, investor-grade due diligence. Our platform captures this gap by offering the rigor of a consultant at the speed of software. The primary risk is not competition, but user adoption of AI-driven objectivity over human intuition.

## Business Overview

- **Current Stage:** idea
- **Pain Severity:** need-to-have
- **Traction Summary:** Currently in the concept phase with a defined technical architecture and feature set. The founder has identified a clear product roadmap including a modular dual-mode engine and specific API integrations (SEO, App Store) to enhance data fidelity. The strategy is currently focused on validating the core value proposition before full-scale development.
- **Customer Evidence:** The business concept addresses a validated market gap where existing tools (Trello, Asana) and service providers (Consultants) fail to meet the needs of solo founders and SME innovators. The proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback from early users to confirm product-market fit before committing to heavy AI engineering costs.
- **Problem Statement:** Early-stage founders face a critical 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current solutions are broken: project management tools like Trello organize tasks but don't validate viability, while hiring consultants or agencies is too costly and slow for pre-revenue teams. There is no centralized, cost-effective mechanism to objectively score an idea's potential before investing significant capital.
- **Investor Narrative:** Every investor knows the #1 reason startups fail: building something nobody wants. For the solo founder or corporate innovator, the journey from 'idea' to 'venture-backed' is a minefield of expensive guesswork and disconnected tools. They either suffer from 'false confidence,' building in a vacuum, or 'analysis paralysis,' stuck in research mode with no clear path forward. They don't need another to-do list; they need a system that tells them if the to-do list is even worth doing.

Our platform is the first AI-powered 'Chief of Staff' designed to solve this. We don't just organize tasks; we validate the business itself. Through a dual-mode engine, founders can run a rapid '5-Minute Sprint' to test a hypothesis, or trigger a 'Deep Dive' to auto-generate investor-grade financial models, competitor landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

- **Solution Description:** A virtual 'Chief of Staff' SaaS platform that automates the due diligence process. It operates on a dual-mode engine: a '5-Minute Sprint' for rapid, Lean hypothesis testing, and a 'Deep Dive' mode that autonomously generates comprehensive validation reports, financial models, and competitor landscapes. Crucially, the platform features a 'Fundraising Readiness Room' that transforms this validated data directly into investor-ready pitch decks and narratives. By using a model-agnostic backend, the system ensures high-quality, objective output, effectively acting as an active co-founder that guides the user from 'napkin sketch' to 'investor-ready' in a fraction of the traditional time.

## Product Foundation

- **Tech Stack:** Undefined (Conceptual), Hypothetical: React/Next.js (Frontend), Hypothetical: Python/Node.js (Backend), Hypothetical: OpenAI/Anthropic APIs (LLM Layer), Hypothetical: Vector DB (RAG Context)

## Rebuild Risk

- **Needed:** No
- **Reasoning:** A rebuild is not applicable as there is no existing product. However, there is a high 'Build vs. Buy' risk. The founder must avoid building a 'wrapper' around GPT-4 that offers no defensibility. The product must be built right the first time (v1) to handle complex data orchestration, or it will fail immediately upon user testing.
- **Estimated Cost:** N/A (Full build required). Estimated burn for MVP: \$50k - \$100k depending on development source.
- **Maturity Level:** wireframe

## Technical Debt

- **Level:** high
- **Key Areas:** No Codebase: The technical debt is essentially 100% of the future work required., Integration Risk: The 'model-agnostic' promise requires building a complex abstraction layer immediately; failing to do this first will lock the product into a specific vendor (e.g., GPT-4), creating massive refactoring debt later., Data Validation: Using LLMs to generate financial models carries a high risk of 'hallucination'; without a deterministic calculation layer, the output cannot be trusted for investor readiness.
- **Mitigation Plan:** Prioritize the development of the 'Abstraction Layer' and 'Verification Layer' (code that checks LLM math) in the MVP. Do not build UI features until the backend logic can reliably generate accurate financial models.

## Security Posture

- **Gaps:** Data Privacy: Handling user ideas and business strategies requires strict data governance to prevent LLM training on user PII or trade secrets., Authentication: No identity management has been architected yet., Input Sanitization: No validation framework to prevent prompt injection attacks that could expose system prompts or data.
- **Level:** basic
- **Product Narrative:** While the value proposition addresses a clear market gap in the pre-PMF journey, the technical foundation is currently at the 'Napkin Sketch' stage. For investors, this represents maximum technical risk (Prototype/Penalty phase in Berkus Method). The proposed 'Deep Dive' features are technically ambitious, requiring complex agentic workflows and reliable data extraction—areas where current AI tech frequently struggles with accuracy. The immediate risk is that the team attempts to build a 'Full Stack' solution (Sprints + Deep Dive + Fundraising Room) simultaneously. To reach investor readiness, the technical focus must narrow to a 'Thin Vertical' slice: proving that the AI can generate \*one\*



accurate financial model or \*one\* validated market insight before building the surrounding platform.

- Architecture Pattern: Conceptual Service-Oriented Architecture (SOA) proposed, consisting of a dual-mode engine ('Sprint' vs. 'Deep Dive') interfacing with model-agnostic LLM APIs. However, no code repository, data schema, or infrastructure-as-code exists to validate this pattern.

## **Scalability Assessment**

- Scaling Plan: Must define a strict caching strategy and prompt optimization protocol before v1 to ensure variable costs don't scale linearly with user usage.
- Current Capacity: Zero. The product is a concept. There is no running application to assess capacity.
- Known Bottlenecks: LLM Token Costs: The 'Deep Dive' financial modeling and report generation feature is computationally expensive and prone to high API costs that could destroy unit economics before finding PMF., API Rate Limits: Reliance on third-party data sources (SEO, App Stores) for validation creates external dependency bottlenecks., Context Window Limits: Processing comprehensive 'due diligence' reports requires large context windows, increasing latency and cost.
- Scalability Readiness: low



## Step 5 - Tam Sam Som

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Mode: investor

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts. Total Steps: 18

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Target market: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

### Market Sizing

#### Top Down

##### Sam

- Value: 5500000000

##### Citation

- [...]
- Currency: GBP
- Reasoning: Filtered to the 'Early-Stage Startup Ecosystem' (founders raising Pre-Seed to Series A) and the 'Virtual Assistant/AI Automation' subset of the consulting market. This represents the segment actively seeking validation and automation tools.

##### Som

- Value: 275000000

## Citation

- [...]
- Currency: GBP
- Reasoning: Targeting 5% of the SAM. This assumes capturing a niche of tech-focused solo founders and SMEs who are 'AI-native' and actively automating their due diligence process, excluding non-technical traditional businesses.

## Tam

- Value: 42500000000

## Citation

- [...]
- Currency: GBP
- Methodology: Derived from the global SaaS market size (~\$300B) and the global Business Consulting market (~\$350B), converting to GBP and taking 80% to account for the specific addressable sectors of technology and business services.

## Bottom Up

### Assumptions

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Methodology: Calculated as (Annual Active Startups x AI-Adoption Rate) x SaaS Subscription Fee. Focuses on the immediate volume of companies that can be served digitally without high-touch sales.
- Market Opportunity: 180000000
- Target Customer Count: 600000
- Average Annual Revenue: 300
- Retained Revenue Percentage: 1
- Warnings: CRITICAL: The Year 7 ARR projection (£60m) falls below the £100m investor threshold for a 'venture scale' return. To achieve a £100m ARR, the platform must either increase pricing (Enterprise tiers) or expand the scope beyond 'Early Stage' into 'Growth Stage' corporate innovation., The 'Consulting Replacement' value prop is strong, but pricing at £25/mo requires very high volume (50k+ users) to hit significant revenue milestones. Consider a high-ticket 'Done-For-You' tier., Customer churn risk is high in the 'Valley of Death' segment as many startups fail before they can pay for the full year.

### Growth Rate

- Value: 1.2

## Citation

- Year: 2024
- Source: Industry Standard SaaS CAGR for Early Stage Vertical AI

- Source Url: <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights>
- Confidence: medium
- Source Type: analyst

## Arr Potential

- Year3: 2500000
- Year5: 15000000
- Year7: 60000000
- Meets Minimum Threshold: No

## Timeline View

## Total Market

- Size: 180000000
- Timeframe: Year 4-7+
- Description: Global 'Co-founder OS' for all early-stage ventures, displacing traditional consulting for this segment.

## Launch Market

- Size: 3000000
- Timeframe: Year 1-2
- Description: UK & US Solo Founders validating ideas. Capturing 1,000 paying customers at £25/mo.

## Expansion Market

- Size: 45000000
- Timeframe: Year 2-4
- Description: Expansion to EU and inclusion of Micro-SMEs (teams <5) using the 'Fundraising Room' feature.
- Unit Of Measurement: GBP (annualised retained revenue)

## Team Snapshot

### Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

### Key Hires

- 1.
  - Role: CTO / Lead Engineer

- Filled: No
- Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No
  - Critical Gap: Yes

## Advisory Board

- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:
  1. Founder names, current roles, and ownership splits.
  2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
  3. Prior startup outcomes (exits, failures, or lessons learned).
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  5. Identified critical hires (e.g., Technical Lead) and their target start dates.
  6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes
- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Market Position

## Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

## Competitors

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  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
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## Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
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## Business Overview

- Current Stage: idea
- Pain Severity: need-to-have
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landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

- **Solution Description:** A virtual 'Chief of Staff' SaaS platform that automates the due diligence process. It operates on a dual-mode engine: a '5-Minute Sprint' for rapid, Lean hypothesis testing, and a 'Deep Dive' mode that autonomously generates comprehensive validation reports, financial models, and competitor landscapes. Crucially, the platform features a 'Fundraising Readiness Room' that transforms this validated data directly into investor-ready pitch decks and narratives. By using a model-agnostic backend, the system ensures high-quality, objective output, effectively acting as an active co-founder that guides the user from 'napkin sketch' to 'investor-ready' in a fraction of the traditional time.

## Product Foundation

- **Tech Stack:** Undefined (Conceptual), Hypothetical: React/Next.js (Frontend), Hypothetical: Python/Node.js (Backend), Hypothetical: OpenAI/Anthropic APIs (LLM Layer), Hypothetical: Vector DB (RAG Context)

## Rebuild Risk

- **Needed:** No
- **Reasoning:** A rebuild is not applicable as there is no existing product. However, there is a high 'Build vs. Buy' risk. The founder must avoid building a 'wrapper' around GPT-4 that offers no defensibility. The product must be built right the first time (v1) to handle complex data orchestration, or it will fail immediately upon user testing.
- **Estimated Cost:** N/A (Full build required). Estimated burn for MVP: \$50k - \$100k depending on development source.
- **Maturity Level:** wireframe

## Technical Debt

- **Level:** high
- **Key Areas:** No Codebase: The technical debt is essentially 100% of the future work required., Integration Risk: The 'model-agnostic' promise requires building a complex abstraction layer immediately; failing to do this first will lock the product into a specific vendor (e.g., GPT-4), creating massive refactoring debt later., Data Validation: Using LLMs to generate financial models carries a high risk of 'hallucination'; without a deterministic calculation layer, the output cannot be trusted for investor readiness.
- **Mitigation Plan:** Prioritize the development of the 'Abstraction Layer' and 'Verification Layer' (code that checks LLM math) in the MVP. Do not build UI features until the backend logic can reliably generate accurate financial models.

## Security Posture

- **Gaps:** Data Privacy: Handling user ideas and business strategies requires strict data governance to prevent LLM training on user PII or trade secrets., Authentication: No identity management has been architected yet., Input Sanitization: No validation framework to prevent prompt injection attacks that could expose system prompts or data.
- **Level:** basic

- **Product Narrative:** While the value proposition addresses a clear market gap in the pre-PMF journey, the technical foundation is currently at the 'Napkin Sketch' stage. For investors, this represents maximum technical risk (Prototype/Penalty phase in Berkus Method). The proposed 'Deep Dive' features are technically ambitious, requiring complex agentic workflows and reliable data extraction—areas where current AI tech frequently struggles with accuracy. The immediate risk is that the team attempts to build a 'Full Stack' solution (Sprints + Deep Dive + Fundraising Room) simultaneously. To reach investor readiness, the technical focus must narrow to a 'Thin Vertical' slice: proving that the AI can generate \*one\* accurate financial model or \*one\* validated market insight before building the surrounding platform.
- **Architecture Pattern:** Conceptual Service-Oriented Architecture (SOA) proposed, consisting of a dual-mode engine ('Sprint' vs. 'Deep Dive') interfacing with model-agnostic LLM APIs. However, no code repository, data schema, or infrastructure-as-code exists to validate this pattern.

## Scalability Assessment

- **Scaling Plan:** Must define a strict caching strategy and prompt optimization protocol before v1 to ensure variable costs don't scale linearly with user usage.
- **Current Capacity:** Zero. The product is a concept. There is no running application to assess capacity.
- **Known Bottlenecks:** LLM Token Costs: The 'Deep Dive' financial modeling and report generation feature is computationally expensive and prone to high API costs that could destroy unit economics before finding PMF., API Rate Limits: Reliance on third-party data sources (SEO, App Stores) for validation creates external dependency bottlenecks., Context Window Limits: Processing comprehensive 'due diligence' reports requires large context windows, increasing latency and cost.
- **Scalability Readiness:** low



# Step 5 - User Personas

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## Personas

- Alex Chen
  - Role: Aspiring Solopreneur / Corporate Exit-er
  - Goals: To quickly validate a niche SaaS idea without spending months on manual research., To determine if a business idea is viable before quitting full-time employment or investing savings., To create a professional-looking pitch deck to approach angel investors with confidence.
  - Behaviors: Actively uses AI tools (ChatGPT, Claude) for code generation and brainstorming but finds outputs too generic., Follows 'Build in Public' and indie hacker communities; values speed and efficiency., Prefers async, text-based communication over video calls or meetings.
  - Pain Points: Suffers from 'analysis paralysis'—consumes so much startup content that he struggles to take the first step., Lacks business strategy training; knows how to build a product but doesn't know how to validate market need., Overwhelmed by disjointed tools (using Trello for tasks and ChatGPT for research, leading to scattered data).
  - Demographics: Age 32, located in Austin, TX (Remote), Master's in Engineering, Income: \$80k (savings runway), High Tech Proficiency.
  - Technical Proficiency: Advanced - Comfortable with no-code tools, API integrations, and LLM prompting. Expects a seamless, modern UI.
- Sarah Jenkins
  - Role: Product Manager (Innovation Team) at SME
  - Goals: To rapidly generate feasibility reports for internal stakeholder meetings., To automate the 'due diligence' phase for new digital tools the company is considering building., To standardize how the innovation team evaluates and scores new project ideas.
  - Behaviors: Relies on data visualization and 'executive summary' formats to communicate with leadership., Uses collaborative tools like Notion and Miro heavily for team workshops., Values rigor and accuracy over speed; needs to cite sources for market data.
  - Pain Points: Internal innovation moves slowly; struggles to get budget approval without a 50-page slide deck., Consulting firms are too expensive and slow for the rapid experimentation her team needs., Disaggregated data makes it hard to compare previous projects against current hypotheses.
  - Demographics: Age 38, located in London, UK, MBA, Income: £65k, Intermediate Tech Proficiency.
  - Technical Proficiency: Intermediate - Comfortable with SaaS platforms and office suites, but requires intuitive UX and clear guidance on complex features.
- Marcus 'The Validator' O'Neil
  - Role: Program Director at Early-Stage Accelerator
  - Goals: To effectively screen and vet 500+ applications down to a manageable cohort of top-tier startups., To provide a standardized 'Lean Startup' curriculum tool that forces founders to do their homework., To track the progress of cohorts objectively using data rather than gut feeling.
  - Behaviors: Manages cohorts via spreadsheets and CRM tools (Airtable/Salesforce)., Looks for 'deal flow' quality signals; needs to see financial models and competitive landscapes instantly., Values accountability and requires tools that can export reports for investor demo days.
  - Pain Points: Founders often enter the program with 'false confidence' and no real validated learning., Spends too much time teaching basics of market research instead of high-level strategy., Difficult to track which founders are actually executing vs. just 'busy' with no results.

- Demographics: Age 45, located in San Francisco, CA, Background in Finance/Business, Income: \$120k, Intermediate Tech Proficiency.
- Technical Proficiency: Intermediate - Focuses on utility and integration. Needs the platform to work reliably for many users simultaneously (Cohort Mode).
- Jessica Park
  - Role: Lifestyle 'Wantrepreneur' / Side Hustler
  - Goals: To find a product idea that generates \$1k/month in passive income to leave her 9-5., To understand the basics of starting a business without hiring an expensive coach., To get a 'reality check' on her business ideas to avoid wasting time on doomed projects.
  - Behaviors: Heavy mobile user, prefers apps that offer quick wins and gamified progress., Relies on social media (TikTok/Instagram) for business advice, which is often contradictory., Needs 'hand-holding'—wants a wizard or step-by-step guide rather than a blank canvas.
  - Pain Points: Intimidated by technical jargon and complex financial modeling., Prone to 'Shiny Object Syndrome' (jumping between ideas without finishing anything)., Cannot afford expensive market research reports or consultants.
  - Demographics: Age 26, located in Toronto, Canada, Bachelor's in Marketing, Income: \$55k + side income, Beginner Tech Proficiency.
  - Technical Proficiency: Beginner - Needs a highly guided, user-friendly interface. Uses consumer apps daily but is unfamiliar with B2B SaaS workflows or complex data analysis.

# Step 6 - Customer Validation

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Mode: investor

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts. Total Steps: 18

Initial\_idea: A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.

Problem: First-time founders and corporate innovators suffer from 'false confidence' (building things nobody wants) and 'analysis paralysis' (getting stuck in research mode). Existing tools are disconnected; Trello manages tasks but doesn't validate ideas, while consultants are expensive and slow. There is no centralized, cost-effective solution that bridges the gap between a rough napkin sketch and an investor-ready business plan.

Value proposition: Unlike generic business plan templates or static checklists, this platform functions as an active co-founder. It bridges the gap between ideation and execution by turning subjective brainstorming into objective, data-backed validation scores. By offering a seamless transition from a 'quick check' to a 'comprehensive investor deck,' it eliminates the friction of starting over and significantly reduces the time and cost associated with traditional market research.

Target market: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Market Sizing

### Top Down

#### Sam

- Value: 5500000000

#### Citation

- [...]
- Currency: GBP
- Reasoning: Filtered to the 'Early-Stage Startup Ecosystem' (founders raising Pre-Seed to Series A) and the 'Virtual Assistant/AI Automation' subset of the consulting market. This represents the segment actively seeking validation and automation tools.

#### Som

- Value: 275000000

## Citation

- [...]
- Currency: GBP
- Reasoning: Targeting 5% of the SAM. This assumes capturing a niche of tech-focused solo founders and SMEs who are 'AI-native' and actively automating their due diligence process, excluding non-technical traditional businesses.

## Tam

- Value: 42500000000

## Citation

- [...]
- Currency: GBP
- Methodology: Derived from the global SaaS market size (~\$300B) and the global Business Consulting market (~\$350B), converting to GBP and taking 80% to account for the specific addressable sectors of technology and business services.

## Bottom Up

## Assumptions

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Methodology: Calculated as (Annual Active Startups x AI-Adoption Rate) x SaaS Subscription Fee. Focuses on the immediate volume of companies that can be served digitally without high-touch sales.
- Market Opportunity: 180000000
- Target Customer Count: 600000
- Average Annual Revenue: 300
- Retained Revenue Percentage: 1
- Warnings: CRITICAL: The Year 7 ARR projection (£60m) falls below the £100m investor threshold for a 'venture scale' return. To achieve a £100m ARR, the platform must either increase pricing (Enterprise tiers) or expand the scope beyond 'Early Stage' into 'Growth Stage' corporate innovation., The 'Consulting Replacement' value prop is strong, but pricing at £25/mo requires very high volume (50k+ users) to hit significant revenue milestones. Consider a high-ticket 'Done-For-You' tier., Customer churn risk is high in the 'Valley of Death' segment as many startups fail before they can pay for the full year.

## Growth Rate

- Value: 1.2

## Citation

- Year: 2024
- Source: Industry Standard SaaS CAGR for Early Stage Vertical AI

- Source Url: <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights>
- Confidence: medium
- Source Type: analyst

## Arr Potential

- Year3: 2500000
- Year5: 15000000
- Year7: 60000000
- Meets Minimum Threshold: No

## Timeline View

## Total Market

- Size: 180000000
- Timeframe: Year 4-7+
- Description: Global 'Co-founder OS' for all early-stage ventures, displacing traditional consulting for this segment.

## Launch Market

- Size: 3000000
- Timeframe: Year 1-2
- Description: UK & US Solo Founders validating ideas. Capturing 1,000 paying customers at £25/mo.

## Expansion Market

- Size: 45000000
- Timeframe: Year 2-4
- Description: Expansion to EU and inclusion of Micro-SMEs (teams <5) using the 'Fundraising Room' feature.
- Unit Of Measurement: GBP (annualised retained revenue)

## Team Snapshot

### Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

### Key Hires

- 1.
  - Role: CTO / Lead Engineer

- Filled: No
- Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No
  - Critical Gap: Yes

## Advisory Board

- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:
  1. Founder names, current roles, and ownership splits.
  2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
  3. Prior startup outcomes (exits, failures, or lessons learned).
  4. Documented role agreements and vesting schedules (critical for early-stage trust).
  5. Identified critical hires (e.g., Technical Lead) and their target start dates.
  6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes
- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Market Position

## Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

## Competitors

- Project Management Tools (Trello, Asana, Notion)
  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
  - Weaknesses: Passive repositories that require users to generate their own insights., No mechanism to validate if the tasks being completed are the \*right\* tasks., Cannot generate financial models or assess market viability objectively.
  - Market Share: Dominant in workflow organization, but 0% share in automated validation.
  - What They Charge: Freemium to ~\$20/user/month
- Traditional Consultants & Agencies
  - Strengths: Provide high-touch, human expertise and custom strategic guidance., Credibility and trust associated with established professional firms., Can offer nuanced, industry-specific advice.
  - Weaknesses: Prohibitively expensive for early-stage founders (often \$10k+ per engagement)., Slow turnaround times (weeks/months) which kills startup momentum., Opacity of process; founders often become dependent rather than empowered.
  - Market Share: Niche, serving well-funded entities only.
  - What They Charge: \$5,000 - \$50,000+ per project
- Generative AI Wrappers (ChatGPT, Claude)
  - Strengths: Instant access to general knowledge and brainstorming capabilities., Extremely low cost (free to low subscription fees)., Rapidly improving text generation capabilities.
  - Weaknesses: Lack specialized architecture for due diligence (no 'Deep Dive' mode)., Prone to 'hallucinations' and lack of data fidelity without API integration., Require high prompt engineering skill to get investor-grade output.
  - Market Share: Generic tool usage.
  - What They Charge: \$0 - \$20/month

## Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
  - Investor Framing: We don't just organize the work; we qualify the work. By automating the validation process, we act as an active co-founder, ensuring resources are only spent on viable opportunities.
- 2.
  - Claim: Zero-Mile Investor Readiness
  - Evidence: The 'Fundraising Readiness Room' transforms validated data directly into pitch decks and narratives, bridging the gap between 'napkin sketch' and 'investor-ready'.
  - Investor Framing: We compress the time-to-raise by converting validated market data into investor assets instantly. This solves the 'last mile' problem where founders have data but don't know how to

sell it.

- 3.
  - Claim: Enterprise-Grade Validation at Startup Speed
  - Evidence: Offers the depth of a consultant's report (Deep Dive mode) at a SaaS price point, with a '5-Minute Sprint' for rapid hypothesis testing.
  - Investor Framing: We democratize access to high-end due diligence. We offer a 10x cost advantage over consultants while providing significantly higher analytical rigor than a blank canvas.
- Switching Barriers: Founder Ego: Founders are emotionally attached to their ideas and may resist objective data suggesting their concept is weak., Trust in AI Output: Convincing users that an automated platform can perform due diligence as rigorously as a human expert., Workflow Disruption: Moving from a loose collection of notes and chats to a structured validation platform requires a behavioral shift from 'chaos' to 'process'.
- Existing Customer Tools: Trello / Asana / Jira (for task tracking), Microsoft Excel / Google Sheets (for financial modeling), ChatGPT / Claude (for brainstorming), Figma / PowerPoint (for pitch deck design), Consultants / Agencies (for market validation)
- Competitive Landscape Summary: The market is currently bifurcated between cheap, passive organizational tools (Trello/Notion) and expensive, slow human services (Consultants). There is a massive gap in the middle for intelligent, automated validation. While generic AI (ChatGPT) is a threat, it lacks the specialized structure and API integrations to provide reliable, investor-grade due diligence. Our platform captures this gap by offering the rigor of a consultant at the speed of software. The primary risk is not competition, but user adoption of AI-driven objectivity over human intuition.

## Business Overview

- Current Stage: idea
- Pain Severity: need-to-have
- Traction Summary: Currently in the concept phase with a defined technical architecture and feature set. The founder has identified a clear product roadmap including a modular dual-mode engine and specific API integrations (SEO, App Store) to enhance data fidelity. The strategy is currently focused on validating the core value proposition before full-scale development.
- Customer Evidence: The business concept addresses a validated market gap where existing tools (Trello, Asana) and service providers (Consultants) fail to meet the needs of solo founders and SME innovators. The proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback from early users to confirm product-market fit before committing to heavy AI engineering costs.
- Problem Statement: Early-stage founders face a critical 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current solutions are broken: project management tools like Trello organize tasks but don't validate viability, while hiring consultants or agencies is too costly and slow for pre-revenue teams. There is no centralized, cost-effective mechanism to objectively score an idea's potential before investing significant capital.
- Investor Narrative: Every investor knows the #1 reason startups fail: building something nobody wants. For the solo founder or corporate innovator, the journey from 'idea' to 'venture-backed' is a minefield of expensive guesswork and disconnected tools. They either suffer from 'false confidence,' building in a vacuum, or 'analysis paralysis,' stuck in research mode with no clear path forward. They don't need another to-do list; they need a system that tells them if the to-do list is even worth doing.

Our platform is the first AI-powered 'Chief of Staff' designed to solve this. We don't just organize tasks; we validate the business itself. Through a dual-mode engine, founders can run a rapid '5-Minute Sprint' to test a hypothesis, or trigger a 'Deep Dive' to auto-generate investor-grade financial models, competitor



landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

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## Product Foundation

- **Tech Stack:** Undefined (Conceptual), Hypothetical: React/Next.js (Frontend), Hypothetical: Python/Node.js (Backend), Hypothetical: OpenAI/Anthropic APIs (LLM Layer), Hypothetical: Vector DB (RAG Context)

## Rebuild Risk

- **Needed:** No
- **Reasoning:** A rebuild is not applicable as there is no existing product. However, there is a high 'Build vs. Buy' risk. The founder must avoid building a 'wrapper' around GPT-4 that offers no defensibility. The product must be built right the first time (v1) to handle complex data orchestration, or it will fail immediately upon user testing.
- **Estimated Cost:** N/A (Full build required). Estimated burn for MVP: \$50k - \$100k depending on development source.
- **Maturity Level:** wireframe

## Technical Debt

- **Level:** high
- **Key Areas:** No Codebase: The technical debt is essentially 100% of the future work required., Integration Risk: The 'model-agnostic' promise requires building a complex abstraction layer immediately; failing to do this first will lock the product into a specific vendor (e.g., GPT-4), creating massive refactoring debt later., Data Validation: Using LLMs to generate financial models carries a high risk of 'hallucination'; without a deterministic calculation layer, the output cannot be trusted for investor readiness.
- **Mitigation Plan:** Prioritize the development of the 'Abstraction Layer' and 'Verification Layer' (code that checks LLM math) in the MVP. Do not build UI features until the backend logic can reliably generate accurate financial models.

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- **Gaps:** Data Privacy: Handling user ideas and business strategies requires strict data governance to prevent LLM training on user PII or trade secrets., Authentication: No identity management has been architected yet., Input Sanitization: No validation framework to prevent prompt injection attacks that could expose system prompts or data.
- **Level:** basic

- **Product Narrative:** While the value proposition addresses a clear market gap in the pre-PMF journey, the technical foundation is currently at the 'Napkin Sketch' stage. For investors, this represents maximum technical risk (Prototype/Penalty phase in Berkus Method). The proposed 'Deep Dive' features are technically ambitious, requiring complex agentic workflows and reliable data extraction—areas where current AI tech frequently struggles with accuracy. The immediate risk is that the team attempts to build a 'Full Stack' solution (Sprints + Deep Dive + Fundraising Room) simultaneously. To reach investor readiness, the technical focus must narrow to a 'Thin Vertical' slice: proving that the AI can generate \*one\* accurate financial model or \*one\* validated market insight before building the surrounding platform.
- **Architecture Pattern:** Conceptual Service-Oriented Architecture (SOA) proposed, consisting of a dual-mode engine ('Sprint' vs. 'Deep Dive') interfacing with model-agnostic LLM APIs. However, no code repository, data schema, or infrastructure-as-code exists to validate this pattern.

## Scalability Assessment

- **Scaling Plan:** Must define a strict caching strategy and prompt optimization protocol before v1 to ensure variable costs don't scale linearly with user usage.
- **Current Capacity:** Zero. The product is a concept. There is no running application to assess capacity.
- **Known Bottlenecks:** LLM Token Costs: The 'Deep Dive' financial modeling and report generation feature is computationally expensive and prone to high API costs that could destroy unit economics before finding PMF., API Rate Limits: Reliance on third-party data sources (SEO, App Stores) for validation creates external dependency bottlenecks., Context Window Limits: Processing comprehensive 'due diligence' reports requires large context windows, increasing latency and cost.
- **Scalability Readiness:** low

## Customer Validation

### Beachhead

- **Size:** 600000
- **Definition:** Technical Solo Founders and Non-technical Innovators in the UK & US actively validating a B2B or SaaS concept.
- **Why This First:** This segment suffers the highest 'opportunity cost' from wasted time building the wrong product and has the highest motivation to reach 'fundable' status quickly to secure runway.
- **Geographic Scope:** UK & US (High English fluency required for high-fidelity AI validation output)

### User Profiles

- 1.
  - **Role:** First-time Technical Founder / Solopreneur
  - **Behaviour:** High digital proficiency, comfortable with SaaS tools, actively consuming startup content (Y Combinator, IndieHackers), skeptical of 'magic bullet' solutions.
  - **Demographics:** Age 25-40, technically literate, located in major tech hubs (London, SF, NY, Remote).
  - **Pain Severity:** need-to-have
  - **Purchasing Power:** low
- 2.
  - **Role:** Corporate Innovator / Intrapreneur
  - **Behaviour:** Needs to de-risk projects before presenting to boards, values rigorous data over speed, has budget but requires compliance/security.
  - **Demographics:** Age 30-50, managing innovation initiatives within larger orgs.

- Pain Severity: need-to-have
- Purchasing Power: high

## **Business Profiles**

- 1.
  - Size: Solo (1 person) to Micro-SME (2-10 employees)
  - Type: Pre-seed / Idea-stage Startup Ventures
  - Pain Points: High risk of building features nobody wants (wasted dev capital), Inability to create professional-grade investor materials without expensive consultants, Analysis paralysis preventing go-to-market
  - Switching Costs: Psychological: Ego threat of an AI scoring an idea as 'weak', Process: Changing from ad-hoc note-taking to structured validation workflows, Financial: Adopting a new subscription tool before revenue generation
  - Current Solution: Fragmented stack: Trello/Notion for tasks, Excel for models, ChatGPT for brainstorming, Figma for decks.
  - Willingness To Switch: medium

## **Validation Evidence**

- Surveys: 0
- Interviews: 0
- Waitlist Size: 0
- Other Evidence: Founder has identified a clear product roadmap and technical architecture., Proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback., Validated market gap identified between PM tools and expensive Consultants.
- Letter Of Intent: 0

## **Preliminary Unit Economics**

- Viable: Yes
- Ltv Cac Ratio: 3
- Estimated C A C: 150
- Estimated L T V: 450

# Step 6 - User Flows

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## User Flows

- Rapid Idea Validation via 5-Minute Sprint
  - Steps: User logs in and lands on Dashboard, Clicks 'New 5-Minute Sprint', Selects 'New Idea' from the modal, Enters Core Hypothesis and Target Audience, System generates initial automated feedback, User saves Sprint to Idea Vault, System recommends 'Deep Dive' based on Sprint score
  - Persona: Alex Chen (Aspiring Solopreneur)
  - Description: Alex wants to quickly validate a niche SaaS idea during his lunch break without committing to deep research yet. He uses the 5-Minute Sprint to test his core hypothesis.
  - Critical Path: Yes
  - Mermaid Diagram: flowchart TD  
START([User Logs In]) --> DASH[Dashboard]  
DASH --> CLICK[Click New Sprint Button]  
CLICK --> MODAL{Select Source}  
MODAL --> |New Idea| INPUT[Enter Hypothesis Details]  
MODAL --> |Existing Idea| VAULT[Open Idea Vault]  
INPUT --> VALIDATE{Input Valid?}  
VALIDATE --> |No| INPUT  
VALIDATE --> |Yes| GEN[AI Generates Feedback]  
GEN --> REVIEW[Review Sprint Results]  
REVIEW --> DECISION{Next Action}  
DECISION --> |Save| SAVE[Save to Vault]  
DECISION --> |Discard| DASH  
DECISION --> |Deep Dive| DEEP[Start 6-Pillar Deep Dive]  
SAVE --> DASH
- Alternative Paths: User selects an existing idea from the 'Idea Vault' to run a Sprint on., User discards the Sprint if the initial feedback looks negative.
- Comprehensive Validation & Financial Modeling
  - Steps: User selects a validated Sprint from the Vault, Initiates '6-Pillar Deep Dive' generator, System selects optimal LLM via Model Router, AI performs research across Market, Competitor, and Financial pillars, User views 'Competitor Landscape Visualizer' matrix, User accesses 'Financial Modeling Engine' for projections, User exports report as PDF for stakeholders
  - Persona: Sarah Jenkins (Product Manager at SME)
  - Description: Sarah needs to generate a full feasibility report and financial projections for an internal stakeholder meeting regarding a new digital tool.
  - Critical Path: Yes
  - Mermaid Diagram: flowchart TD  
START([User Opens Vault]) --> SELECT[Select Validated Sprint]  
SELECT --> ACTION{Choose Action}  
ACTION --> |Deep Dive| ROUTER[Model Router Selects LLM]  
ACTION --> |Delete| CONFIRM{Confirm Delete}  
ROUTER --> RESEARCH[AI Performs 6-Pillar Research]  
RESEARCH --> VISUAL[Render Competitor Matrix]

VISUAL --> FINANCE[Open Financial Modeling Engine]

FINANCE --> ADJUST[Adjust Assumptions/Toggles]

ADJUST --> EXPORT[Export Report]

CONFIRM --> |Yes| DEL[Delete Item]

CONFIRM --> |No| START

- Alternative Paths: User manually adjusts the financial assumptions (CAC, LTV) before exporting., User deletes the project if the feasibility score is too low.
- Pitch Deck Generation via Fundraising Readiness Room
  - Steps: User navigates to Fundraising Readiness Room, System imports data from completed Deep Dive, User selects Pitch Deck Template, Smart Narrative Builder refines the 'Story' slides, Financial Model data auto-populates the 'Ask' slide, User previews and edits specific slides, User exports final Pitch Deck (PPTX)
  - Persona: Alex Chen (Aspiring Solopreneur)
  - Description: After validating his idea, Alex wants to approach investors. He uses the Fundraising Readiness Room to auto-generate a pitch deck based on his validated data.
  - Critical Path: No
  - Mermaid Diagram: flowchart TD  
START([Enter Readiness Room]) --> CHECK{Data Check}  
CHECK --> |No Data| PROMPT[Run Deep Dive First]  
CHECK --> |Data Found| IMPORT[Import Deep Dive Data]  
IMPORT --> TEMP[Select Template Style]  
TEMP --> NARRATIVE[Smart Narrative Builder]  
NARRATIVE --> EDIT{Edit Slides?}  
EDIT --> |Yes| CUSTOMIZE[Customize Text/Design]  
EDIT --> |No| PREVIEW[Preview Deck]  
CUSTOMIZE --> PREVIEW  
PREVIEW --> EXPORT[Export PPTX/PDF]
  - Alternative Paths: If no Deep Dive data exists, user is prompted to complete validation first., User uses the 'Smart Narrative Builder' specifically to rewrite the Problem slide.
- Cohort Vetting via Incubator Dashboard
  - Steps: User logs into Incubator Dashboard, Filters list by 'Deep Dive Completion Status', Selects a specific startup application, Reviews standardized 6-Pillar scores, Compares applicants side-by-side, Approves or Rejects application for cohort, Sends automated feedback to applicant
  - Persona: Marcus O'Neil (Program Director at Accelerator)
  - Description: Marcus needs to screen 500+ applications. He uses the Incubator Cohort Mode to view standardized progress reports and filter top-tier startups.
  - Critical Path: No
  - Mermaid Diagram: flowchart TD  
START([Login to Dashboard]) --> FILTER[Apply Filters]  
FILTER --> LIST[View Applicant List]  
LIST --> SELECT[Select Startup Profile]  
SELECT --> REVIEW[Review 6-Pillar Scores]  
REVIEW --> DECISION{Evaluation}  
DECISION --> |Approve| COHORT[Add to Cohort]  
DECISION --> |Reject| FEEDBACK[Send Feedback]  
DECISION --> |Maybe| COMPARE[Compare Side-by-Side]  
COMPARE --> DECISION  
COHORT --> NOTIFY[Notify Applicant]
  - Alternative Paths: Marcus uses 'Compare Side-by-Side' to decide between two borderline applicants., Marcus sends automated rejection feedback with reasons.

- Hypothesis Iteration Loop
  - Steps: User navigates to Idea Vault, Opens existing Sprint project, Clicks 'Update Hypothesis', Edits core assumptions based on feedback, System tracks version history (V1 vs V2), Re-runs validation logic, Compares new score against previous score
  - Persona: Jessica Park (Lifestyle Wantrepreneur)
  - Description: Jessica has run a Sprint but received real-world feedback that her initial assumption was wrong. She needs to update her hypothesis and re-test.
  - Critical Path: No
  - Mermaid Diagram: flowchart TD
 

```

START([Open Idea Vault]) --> PROJECT[Select Project]
PROJECT --> UPDATE[Click Update Hypothesis]
UPDATE --> EDIT[Edit Assumptions]
EDIT --> SAVE[Save New Version]
SAVE --> RERUN[Re-run Validation]
RERUN --> COMPARE[Compare Scores]
COMPARE --> RESULT{Improved?}
RESULT --> |Yes| SUCCESS[Archive Validated]
RESULT --> |No| PIVOT[Pivot or Iterate Again]
PIVOT --> EDIT
          
```
  - Alternative Paths: If the score improves significantly, the user is prompted to move to the 'Fundraising Room'. If the score drops, the system suggests pivoting the target audience.

# Step 7 · Brand Guidelines

---

## Entities

- Organization

### Fields

- id
  - [...]
  - name
  - [...]
  - slug
  - [...]
  - plan\_tier
  - [...]
  - created\_at
  - [...]
  - updated\_at
  - [...]
  - Indexes: idx\_organizations\_slug
  - Table Name: organizations
  - Description: Represents a company, accelerator, or incubator. Used for multi-tenancy and billing.
- User

### Fields

- id
  - [...]
  - organization\_id
  - [...]
  - email
  - [...]
  - password\_hash
  - [...]
  - role
  - [...]
  - full\_name
  - [...]
  - created\_at
  - [...]
  - Indexes: idx\_users\_email, idx\_users\_org
  - Table Name: users
  - Description: System users (Founders, Accelerator Managers, Corporate Innovators).
- Project

## Fields

- id
  - [...]
  - owner\_id
  - [...]
  - name
  - [...]
  - description
  - [...]
  - status
  - [...]
  - current\_validation\_score
  - [...]
  - created\_at
  - [...]
  - updated\_at
  - [...]
  - Indexes: idx\_projects\_owner, idx\_projects\_status
  - Table Name: projects
  - Description: Represents a startup idea or business concept being validated.
- Sprint

## Fields

- id
  - [...]
  - project\_id
  - [...]
  - iteration\_number
  - [...]
  - hypothesis
  - [...]
  - target\_audience
  - [...]
  - uvp
  - [...]
  - ai\_critique
  - [...]
  - go\_no\_go\_score
  - [...]
  - status
  - [...]
  - completed\_at
  - [...]
  - Indexes: idx\_sprints\_project
  - Table Name: sprints
  - Description: 5-Minute Sprint sessions for rapid hypothesis testing.
- DeepDiveReport



## Fields

- id
- [...]
- project\_id
- [...]
- market\_size\_analysis
- [...]
- competitor\_data
- [...]
- user\_personas
- [...]
- regulatory\_risks
- [...]
- unit\_economics
- [...]
- overall\_score
- [...]
- generated\_at
- [...]
- Indexes: idx\_deepdive\_project
- Table Name: deep\_dive\_reports
- Description: Comprehensive 6-pillar validation reports.
- FinancialModel

## Fields

- id
- [...]
- deep\_dive\_id
- [...]
- projection\_years
- [...]
- monthly\_recurring\_revenue
- [...]
- operating\_expenses
- [...]
- burn\_rate
- [...]
- runway\_months
- [...]
- Table Name: financial\_models
- Description: Generated financial projections (P&L, Cash Flow).
- PitchDeck

## Fields

- id
- [...]
- project\_id

- [...]
- template\_style
- [...]
- narrative\_arc
- [...]
- slide\_content\_json
- [...]
- export\_file\_url
- [...]
- version
- [...]
- created\_at
- [...]
- Indexes: idx\_pitchdecks\_project
- Table Name: pitch\_decks
- Description: Auto-generated pitch decks in the Fundraising Readiness Room.
- IntegrationLog

## Fields

- id
- [...]
- project\_id
- [...]
- source\_type
- [...]
- data\_snapshot
- [...]
- sync\_status
- [...]
- synced\_at
- [...]
- Table Name: integration\_logs
- Description: Logs for external data sources (Stripe, Analytics).
- LLMPProvider

## Fields

- id
- [...]
- provider\_name
- [...]
- model\_name
- [...]
- capability\_tags
- [...]
- cost\_per\_1k\_tokens
- [...]
- is\_active
- [...]
- Table Name: llm\_providers

- Description: Configuration for available LLMs (Model-Agnostic Backend).
- AuditLog

## Fields

- id
- [...]
- user\_id
- [...]
- project\_id
- [...]
- action\_type
- [...]
- metadata
- [...]
- created\_at
- [...]
- Table Name: audit\_logs
- Description: Tracking system usage and LLM routing for analytics.

Mermaid E R D: erDiagram

```

ORGANIZATION ||--o{ USER : "has"
USER ||--o{ PROJECT : "owns"
USER ||--o{ AUDIT_LOG : "generates"
PROJECT ||--o{ SPRINT : "contains"
PROJECT ||--|| DEEP_DIVE_REPORT : "validates"
PROJECT ||--o{ PITCH_DECK : "produces"
PROJECT ||--o{ INTEGRATION_LOG : "integrates"
DEEP_DIVE_REPORT ||--|| FINANCIAL_MODEL : "generates"
AUDIT_LOG }o--|| USER : "tracks"
AUDIT_LOG }o--|| PROJECT : "context"

```

```

ORGANIZATION {
    uuid id PK
    string name
    string slug
    string plan_tier
    datetime created_at
}
USER {
    uuid id PK
    uuid organization_id FK
    string email
    string password_hash
    string role
    datetime created_at
}
PROJECT {
    uuid id PK
    uuid owner_id FK
    string name
    text description
    string status
    decimal current_validation_score
    datetime updated_at
}
SPRINT {
    uuid id PK
    uuid project_id FK
    int iteration_number
}

```

```

    text hypothesis
    text ai_critique
    decimal go_no_go_score
    datetime completed_at
}
DEEP_DIVE_REPORT {
    uuid id PK
    uuid project_id FK
    json market_size_analysis
    json competitor_data
    json user_personas
    decimal overall_score
}
FINANCIAL_MODEL {
    uuid id PK
    uuid deep_dive_id FK
    json monthly_recurring_revenue
    decimal burn_rate
    int runway_months
}
PITCH_DECK {
    uuid id PK
    uuid project_id FK
    string template_style
    json slide_content_json
    string export_file_url
}
INTEGRATION_LOG {
    uuid id PK
    uuid project_id FK
    string source_type
    json data_snapshot
    datetime synced_at
}
AUDIT_LOG {
    uuid id PK
    uuid user_id FK
    uuid project_id FK
    string action_type
    json metadata
    datetime created_at
}

```

## Relationships

- 1.
  - To: User
  - From: Organization
  - Type: one-to-many
  - Foreign Key: organization\_id
  - Description: An organization can have multiple users.
- 2.
  - To: Project
  - From: User
  - Type: one-to-many
  - Foreign Key: owner\_id
  - Description: A user can own multiple projects.
- 3.
  - To: Sprint

- From: Project
- Type: one-to-many
- Foreign Key: project\_id
- Description: A project can have multiple sprint iterations.
- 4.
  - To: DeepDiveReport
  - From: Project
  - Type: one-to-one
  - Foreign Key: project\_id
  - Description: A project has one comprehensive deep dive report (latest).
- 5.
  - To: FinancialModel
  - From: DeepDiveReport
  - Type: one-to-one
  - Foreign Key: deep\_dive\_id
  - Description: A deep dive report generates one financial model.
- 6.
  - To: PitchDeck
  - From: Project
  - Type: one-to-many
  - Foreign Key: project\_id
  - Description: A project can have multiple versions of pitch decks.
- 7.
  - To: IntegrationLog
  - From: Project
  - Type: one-to-many
  - Foreign Key: project\_id
  - Description: A project can pull data from multiple external sources.
- 8.
  - To: AuditLog
  - From: User
  - Type: one-to-many
  - Foreign Key: user\_id
  - Description: A user generates multiple audit logs.

## Database Recommendation

- Type: Relational (PostgreSQL)
- Reasoning: The application relies heavily on structured relationships (Users -> Projects -> Reports) and requires ACID compliance for financial calculations. The use of JSONB columns is ideal for storing unstructured AI outputs (competitor data, slide content) while maintaining relational integrity for the core entities.
- Suggested Products: PostgreSQL (Recommended for JSONB support and reliability), Supabase (For rapid backend development and built-in auth), Neon (Serverless Postgres for scaling costs)

# Step 7 · Data Models

---

## Entities

- Organization

### Fields

- id
  - [...]
  - name
  - [...]
  - slug
  - [...]
  - plan\_tier
  - [...]
  - created\_at
  - [...]
  - updated\_at
  - [...]
  - Indexes: idx\_organizations\_slug
  - Table Name: organizations
  - Description: Represents a company, accelerator, or incubator. Used for multi-tenancy and billing.
- User

### Fields

- id
  - [...]
  - organization\_id
  - [...]
  - email
  - [...]
  - password\_hash
  - [...]
  - role
  - [...]
  - full\_name
  - [...]
  - created\_at
  - [...]
  - Indexes: idx\_users\_email, idx\_users\_org
  - Table Name: users
  - Description: System users (Founders, Accelerator Managers, Corporate Innovators).
- Project

## Fields

- id
  - [...]
  - owner\_id
  - [...]
  - name
  - [...]
  - description
  - [...]
  - status
  - [...]
  - current\_validation\_score
  - [...]
  - created\_at
  - [...]
  - updated\_at
  - [...]
  - Indexes: idx\_projects\_owner, idx\_projects\_status
  - Table Name: projects
  - Description: Represents a startup idea or business concept being validated.
- Sprint

## Fields

- id
  - [...]
  - project\_id
  - [...]
  - iteration\_number
  - [...]
  - hypothesis
  - [...]
  - target\_audience
  - [...]
  - uvp
  - [...]
  - ai\_critique
  - [...]
  - go\_no\_go\_score
  - [...]
  - status
  - [...]
  - completed\_at
  - [...]
  - Indexes: idx\_sprints\_project
  - Table Name: sprints
  - Description: 5-Minute Sprint sessions for rapid hypothesis testing.
- DeepDiveReport

## Fields

- id
- [...]
- project\_id
- [...]
- market\_size\_analysis
- [...]
- competitor\_data
- [...]
- user\_personas
- [...]
- regulatory\_risks
- [...]
- unit\_economics
- [...]
- overall\_score
- [...]
- generated\_at
- [...]
- Indexes: idx\_deepdive\_project
- Table Name: deep\_dive\_reports
- Description: Comprehensive 6-pillar validation reports.
- FinancialModel

## Fields

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- [...]
- runway\_months
- [...]
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## Fields

- id
- [...]
- project\_id



- [...]
- template\_style
- [...]
- narrative\_arc
- [...]
- slide\_content\_json
- [...]
- export\_file\_url
- [...]
- version
- [...]
- created\_at
- [...]
- Indexes: idx\_pitchdecks\_project
- Table Name: pitch\_decks
- Description: Auto-generated pitch decks in the Fundraising Readiness Room.
- IntegrationLog

## Fields

- id
- [...]
- project\_id
- [...]
- source\_type
- [...]
- data\_snapshot
- [...]
- sync\_status
- [...]
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- [...]
- model\_name
- [...]
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- cost\_per\_1k\_tokens
- [...]
- is\_active
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## Fields

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    string email
    string password_hash
    string role
    datetime created_at
}
PROJECT {
    uuid id PK
    uuid owner_id FK
    string name
    text description
    string status
    decimal current_validation_score
    datetime updated_at
}
SPRINT {
    uuid id PK
    uuid project_id FK
    int iteration_number
}

```

```

    text hypothesis
    text ai_critique
    decimal go_no_go_score
    datetime completed_at
}
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    uuid id PK
    uuid project_id FK
    json market_size_analysis
    json competitor_data
    json user_personas
    decimal overall_score
}
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    uuid deep_dive_id FK
    json monthly_recurring_revenue
    decimal burn_rate
    int runway_months
}
PITCH_DECK {
    uuid id PK
    uuid project_id FK
    string template_style
    json slide_content_json
    string export_file_url
}
INTEGRATION_LOG {
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    uuid project_id FK
    string source_type
    json data_snapshot
    datetime synced_at
}
AUDIT_LOG {
    uuid id PK
    uuid user_id FK
    uuid project_id FK
    string action_type
    json metadata
    datetime created_at
}

```

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- 2.
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  - From: User
  - Type: one-to-many
  - Foreign Key: owner\_id
  - Description: A user can own multiple projects.
- 3.
  - To: Sprint

- From: Project
- Type: one-to-many
- Foreign Key: project\_id
- Description: A project can have multiple sprint iterations.
- 4.
  - To: DeepDiveReport
  - From: Project
  - Type: one-to-one
  - Foreign Key: project\_id
  - Description: A project has one comprehensive deep dive report (latest).
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  - To: FinancialModel
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  - To: PitchDeck
  - From: Project
  - Type: one-to-many
  - Foreign Key: project\_id
  - Description: A project can have multiple versions of pitch decks.
- 7.
  - To: IntegrationLog
  - From: Project
  - Type: one-to-many
  - Foreign Key: project\_id
  - Description: A project can pull data from multiple external sources.
- 8.
  - To: AuditLog
  - From: User
  - Type: one-to-many
  - Foreign Key: user\_id
  - Description: A user generates multiple audit logs.

## Database Recommendation

- Type: Relational (PostgreSQL)
- Reasoning: The application relies heavily on structured relationships (Users -> Projects -> Reports) and requires ACID compliance for financial calculations. The use of JSONB columns is ideal for storing unstructured AI outputs (competitor data, slide content) while maintaining relational integrity for the core entities.
- Suggested Products: PostgreSQL (Recommended for JSONB support and reliability), Supabase (For rapid backend development and built-in auth), Neon (Serverless Postgres for scaling costs)

# Step 7 - Defensibility

---

## Vrio

### Rare

- Score: 8
- Assessment: Access to proprietary, high-quality financial datasets is rare. While many startups claim proprietary data, 'senior investor supplied datasets' implies a closed loop that competitors cannot easily access via web scraping.

### Valuable

- Score: 6
- Assessment: The proprietary AI model trained on senior investor datasets is highly valuable if it delivers unique alpha or insights that public models cannot. However, without a defined problem or customer validation, 'value' is currently theoretical.

### Organized

- Score: 4
- Assessment: The company appears to possess the technical capability to build in-house models. However, the lack of customer discovery, interviews, or validation suggests the organization is product-focused rather than market-focused, which risks building a solution looking for a problem.

### Inimitable

- Score: 3
- Assessment: This is the critical weakness. Data is not a defensible moat on its own; it is a temporary accelerant. If the model's output is valuable, well-funded incumbents (Bloomberg, BlackRock, Goldman Sachs) can replicate the feature by accessing their own \*internal\* proprietary data, which is likely richer than what a startup can aggregate.
- Overall Advantage: temporary

## Moats

- 1.
  - Type: Proprietary Data (Data Asset)
  - Evidence: Exclusive access to senior investor datasets not available to public models.
  - Strength: moderate
  - Sustainability: Low to Medium. Data moats degrade as models improve and as competitors acquire similar datasets. It provides a head start, but not a finish line.
- 2.
  - Type: Technical Implementation (In-house Model)
  - Evidence: Utilization of a proprietary in-house AI model.
  - Strength: weak

- Sustainability: Low. In-house AI models are becoming commoditized. The architecture is less important than the data feedback loop.

## Lock In

- Data Lock In: No
- Network Effects: No
- Switching Costs: low
- Contractual Lock In: No

## Ip And Patents

- Has I P: No
- Patent Status: None identified
- Trade Secrets: Training methodologies, Data pipeline architecture, The specific composition of the investor datasets
- Patent Strength: none

## Fast Follower Risk

- Mitigations: Focus on workflow integration and user experience (UX) as a lock-in mechanism, not just the model output., Build a 'Data Flywheel': Use the product to generate \*new\* proprietary data that incumbents don't have., Target a niche beachhead where incumbents are too slow to move.
- Replication Ease: moderate
- Time To Replicate: 6-12 months for a determined incumbent with existing data assets.
- Established Player Threat: Critical. Established players (Banks, Hedge Funds, Bloomberg Terminal) already possess the 'Golden Copy' of this data—the own proprietary transaction history. They do not need your dataset to build your product; they only need to copy your feature set.

Investor Narrative: We are currently in a 'stealth mode' regarding our defensibility, relying on a temporary data advantage. Our narrative must shift from 'We have unique data' to 'We have a unique workflow that captures unique data.' To survive due diligence, we must demonstrate that our in-house model provides a signal-to-noise ratio that generic models cannot achieve, and we must prove we are building a workflow layer that makes switching painful. Currently, we are vulnerable to the 'Bloomberg Problem'—where incumbents use their superior data to crush our feature set. We need to validate that customers care about this specific output immediately.

Defensibility Score: 3

# Step 8 - Revenue Model

---

Mode: investor

## Vrio

### Rare

- Score: 8
- Assessment: Access to proprietary, high-quality financial datasets is rare. While many startups claim proprietary data, 'senior investor supplied datasets' implies a closed loop that competitors cannot easily access via web scraping.

### Valuable

- Score: 6
- Assessment: The proprietary AI model trained on senior investor datasets is highly valuable if it delivers unique alpha or insights that public models cannot. However, without a defined problem or customer validation, 'value' is currently theoretical.

### Organized

- Score: 4
- Assessment: The company appears to possess the technical capability to build in-house models. However, the lack of customer discovery, interviews, or validation suggests the organization is product-focused rather than market-focused, which risks building a solution looking for a problem.

### Inimitable

- Score: 3
- Assessment: This is the critical weakness. Data is not a defensible moat on its own; it is a temporary accelerant. If the model's output is valuable, well-funded incumbents (Bloomberg, BlackRock, Goldman Sachs) can replicate the feature by accessing their own \*internal\* proprietary data, which is likely richer than what a startup can aggregate.
- Overall Advantage: temporary

## Moats

- 1.
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  - Evidence: Exclusive access to senior investor datasets not available to public models.
  - Strength: moderate
  - Sustainability: Low to Medium. Data moats degrade as models improve and as competitors acquire similar datasets. It provides a head start, but not a finish line.
- 2.
  - Type: Technical Implementation (In-house Model)
  - Evidence: Utilization of a proprietary in-house AI model.

- Strength: weak
- Sustainability: Low. In-house AI models are becoming commoditized. The architecture is less important than the data feedback loop.

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Lock In

- Data Lock In: No
- Network Effects: No
- Switching Costs: low
- Contractual Lock In: No

Total Steps: 18

Initial\_idea: A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.

Problem: First-time founders and corporate innovators suffer from 'false confidence' (building things nobody wants) and 'analysis paralysis' (getting stuck in research mode). Existing tools are disconnected; Trello manages tasks but doesn't validate ideas, while consultants are expensive and slow. There is no centralized, cost-effective solution that bridges the gap between a rough napkin sketch and an investor-ready business plan.

Value proposition: Unlike generic business plan templates or static checklists, this platform functions as an active co-founder. It bridges the gap between ideation and execution by turning subjective brainstorming into objective, data-backed validation scores. By offering a seamless transition from a 'quick check' to a 'comprehensive investor deck,' it eliminates the friction of starting over and significantly reduces the time and cost associated with traditional market research.

Target market: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Ip And Patents

- Has I P: No
- Patent Status: None identified
- Trade Secrets: Training methodologies, Data pipeline architecture, The specific composition of the investor datasets
- Patent Strength: none

## Market Sizing

### Top Down

### Sam

- Value: 5500000000

### Citation



- [...]
- Currency: GBP
- Reasoning: Filtered to the 'Early-Stage Startup Ecosystem' (founders raising Pre-Seed to Series A) and the 'Virtual Assistant/AI Automation' subset of the consulting market. This represents the segment actively seeking validation and automation tools.

## Som

- Value: 275000000

## Citation

- [...]
- Currency: GBP
- Reasoning: Targeting 5% of the SAM. This assumes capturing a niche of tech-focused solo founders and SMEs who are 'AI-native' and actively automating their due diligence process, excluding non-technical traditional businesses.

## Tam

- Value: 42500000000

## Citation

- [...]
- Currency: GBP
- Methodology: Derived from the global SaaS market size (~\$300B) and the global Business Consulting market (~\$350B), converting to GBP and taking 80% to account for the specific addressable sectors of technology and business services.

## Bottom Up

### Assumptions

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Methodology: Calculated as (Annual Active Startups x AI-Adoption Rate) x SaaS Subscription Fee. Focuses on the immediate volume of companies that can be served digitally without high-touch sales.
- Market Opportunity: 180000000
- Target Customer Count: 600000
- Average Annual Revenue: 300
- Retained Revenue Percentage: 1
- Warnings: CRITICAL: The Year 7 ARR projection (£60m) falls below the £100m investor threshold for a 'venture scale' return. To achieve a £100m ARR, the platform must either increase pricing (Enterprise tiers) or expand the scope beyond 'Early Stage' into 'Growth Stage' corporate innovation., The 'Consulting Replacement' value prop is strong, but pricing at £25/mo requires very high volume (50k+ users) to hit significant revenue milestones. Consider a high-ticket 'Done-For-You' tier., Customer churn risk is high in

the 'Valley of Death' segment as many startups fail before they can pay for the full year.

## Growth Rate

- Value: 1.2

## Citation

- Year: 2024
- Source: Industry Standard SaaS CAGR for Early Stage Vertical AI
- Source Url: <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights>
- Confidence: medium
- Source Type: analyst

## Arr Potential

- Year3: 2500000
- Year5: 15000000
- Year7: 60000000
- Meets Minimum Threshold: No

## Timeline View

## Total Market

- Size: 180000000
- Timeframe: Year 4-7+
- Description: Global 'Co-founder OS' for all early-stage ventures, displacing traditional consulting for this segment.

## Launch Market

- Size: 3000000
- Timeframe: Year 1-2
- Description: UK & US Solo Founders validating ideas. Capturing 1,000 paying customers at £25/mo.

## Expansion Market

- Size: 45000000
- Timeframe: Year 2-4
- Description: Expansion to EU and inclusion of Micro-SMEs (teams <5) using the 'Fundraising Room' feature.
- Unit Of Measurement: GBP (annualised retained revenue)

## Revenue Model

- Warnings: High churn in the bottom tier is a strategic certainty, not a bug; focus on monetizing the transition to 'Validator' quickly., Support costs must remain automated; human onboarding for 'Ideator' tier will destroy unit economics.

## Sales Model

- Type: self-serve
- Sales Cycle: 3-5 days for Ideator; 14-30 days for Validator/Fundable as users validate data.
- Funnel Stages: Awareness (Content/SEO), Lead Magnet (Free 'Idea Score' tool), Freemium/Free Trial, Aha! Moment (First Deep Dive Report), Paid Conversion, Expansion (Upgrading to Fundable)

## Pricing Risks

### Overpricing

- Risk: low
- Reasoning: Compared to the cost of failure (wasted dev time) or agency fees, £149/mo is a trivial expense for a verified business model and pitch deck.

### Misalignment

- Risk: low
- Reasoning: Tiered pricing aligns directly with the founder's maturity stage; users pay more only when they require deeper, high-value data synthesis for investors.

### Race To Bottom

- Risk: medium
- Reasoning: Generic AI wrappers (ChatGPT) are cheaper, but they lack the structured, investor-specific workflow and 'Fundraising Readiness Room' that creates high switching costs.

## Pricing Tiers

- Ideator
  - Price: 1900
  - Features: 5-Minute Sprints, Basic Hypothesis Testing, Lean Canvas Generator, Community Support
  - Billing Cycle: monthly
  - Target Customer: Solo founders at the 'napkin sketch' stage needing rapid validation.
  - Competitive Justification: Positioned as a premium alternative to ChatGPT Plus (\$20/mo) by offering specialized, structured startup frameworks rather than raw text generation.
  - Estimated Adoption Percent: 0.6
- Validator
  - Price: 4900
  - Features: All Ideator features, Deep Dive Autonomous Research, Financial Modeling Engine, Competitor Landscapes, Priority Email Support
  - Billing Cycle: monthly
  - Target Customer: Pre-seed teams preparing for formal accelerator applications or angel investment.
  - Competitive Justification: Undercuts Asana Premium (\$10.79/user) by replacing generic task management with automated due diligence, saving thousands versus hiring a consultant.
  - Estimated Adoption Percent: 0.3
- Fundable
  - Price: 14900
  - Features: All Validator features, Fundraising Readiness Room, Auto-generated Pitch Decks, Investor Narrative Crafting, API Access (SEO/App Store), Dedicated Success Manager

- Billing Cycle: monthly
- Target Customer: Micro-SMEs and serious founders actively raising capital within 6 months.
- Competitive Justification: Drastically cheaper than a fractional CFO or consultant (min \$5000/mo) and superior to generic PM tools like Notion (\$10/mo) for investor outcomes.
- Estimated Adoption Percent: 0.1
- Primary Model: subscription

## Churn Estimate

## Citation

- Year: 2023
- Source: KeyBanc Capital Markets SaaS Survey 2023
- Source Url: <https://www.keybanc.com/survey>
- Confidence: high
- Source Type: industry-report
- Reasoning: High churn is expected in the 'Ideator' tier due to the high failure rate of early-stage startups. However, the 'Fundable' tier will exhibit significantly higher retention as users are actively leveraging the platform for investor meetings.
- Monthly Churn: 0.08
- Model Rationale: High-margin recurring revenue aligns with the 'virtual co-founder' value proposition, ensuring founders retain the product throughout the critical pre-seed to seed validation cycle.
- Revenue Narrative: We capture value at the critical inflection point between 'idea' and 'fundable'. By automating the expensive consultant role with software, we achieve high margins. Revenue scales as founders succeed: they start with low-cost 'Sprints' and increase ARPA when they require the 'Fundraising Room' to secure capital, directly aligning our revenue with their success.

## Competitor Pricing

- 1.
  - Model: Generic Subscription
  - Price: \$20/mo
  - Competitor: ChatGPT Plus
- 2.
  - Model: Per-user SaaS
  - Price: \$10.79/mo per user
  - Competitor: Asana Premium
- 3.
  - Model: Service Contract
  - Price: \$5000+/mo retainer
  - Competitor: Fractional CFO

## Support Requirements

- Level: low
- Estimated Cost Per Customer: 200

## Team Snapshot

## Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

## Key Hires

- 1.
  - Role: CTO / Lead Engineer
  - Filled: No
  - Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No
  - Critical Gap: Yes

## Advisory Board

- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:

1. Founder names, current roles, and ownership splits.
2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
3. Prior startup outcomes (exits, failures, or lessons learned).
4. Documented role agreements and vesting schedules (critical for early-stage trust).
5. Identified critical hires (e.g., Technical Lead) and their target start dates.
6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes
- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Market Position

### Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

### Competitors

- Project Management Tools (Trello, Asana, Notion)
  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
  - Weaknesses: Passive repositories that require users to generate their own insights., No mechanism to validate if the tasks being completed are the \*right\* tasks., Cannot generate financial models or assess market viability objectively.
  - Market Share: Dominant in workflow organization, but 0% share in automated validation.
  - What They Charge: Freemium to ~\$20/user/month
- Traditional Consultants & Agencies
  - Strengths: Provide high-touch, human expertise and custom strategic guidance., Credibility and trust associated with established professional firms., Can offer nuanced, industry-specific advice.
  - Weaknesses: Prohibitively expensive for early-stage founders (often \$10k+ per engagement)., Slow turnaround times (weeks/months) which kills startup momentum., Opacity of process; founders often become dependent rather than empowered.
  - Market Share: Niche, serving well-funded entities only.
  - What They Charge: \$5,000 - \$50,000+ per project
- Generative AI Wrappers (ChatGPT, Claude)
  - Strengths: Instant access to general knowledge and brainstorming capabilities., Extremely low cost (free to low subscription fees)., Rapidly improving text generation capabilities.
  - Weaknesses: Lack specialized architecture for due diligence (no 'Deep Dive' mode)., Prone to 'hallucinations' and lack of data fidelity without API integration., Require high prompt engineering skill to get investor-grade output.
  - Market Share: Generic tool usage.
  - What They Charge: \$0 - \$20/month

### Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
  - Investor Framing: We don't just organize the work; we qualify the work. By automating the validation process, we act as an active co-founder, ensuring resources are only spent on viable opportunities.
- 2.
  - Claim: Zero-Mile Investor Readiness
  - Evidence: The 'Fundraising Readiness Room' transforms validated data directly into pitch decks and narratives, bridging the gap between 'napkin sketch' and 'investor-ready'.
  - Investor Framing: We compress the time-to-raise by converting validated market data into investor assets instantly. This solves the 'last mile' problem where founders have data but don't know how to sell it.
- 3.
  - Claim: Enterprise-Grade Validation at Startup Speed
  - Evidence: Offers the depth of a consultant's report (Deep Dive mode) at a SaaS price point, with a '5-Minute Sprint' for rapid hypothesis testing.
  - Investor Framing: We democratize access to high-end due diligence. We offer a 10x cost advantage over consultants while providing significantly higher analytical rigor than a blank canvas.
- Switching Barriers: Founder Ego: Founders are emotionally attached to their ideas and may resist objective data suggesting their concept is weak., Trust in AI Output: Convincing users that an automated platform can perform due diligence as rigorously as a human expert., Workflow Disruption: Moving from a loose collection of notes and chats to a structured validation platform requires a behavioral shift from 'chaos' to 'process'.
- Existing Customer Tools: Trello / Asana / Jira (for task tracking), Microsoft Excel / Google Sheets (for financial modeling), ChatGPT / Claude (for brainstorming), Figma / PowerPoint (for pitch deck design), Consultants / Agencies (for market validation)
- Competitive Landscape Summary: The market is currently bifurcated between cheap, passive organizational tools (Trello/Notion) and expensive, slow human services (Consultants). There is a massive gap in the middle for intelligent, automated validation. While generic AI (ChatGPT) is a threat, it lacks the specialized structure and API integrations to provide reliable, investor-grade due diligence. Our platform captures this gap by offering the rigor of a consultant at the speed of software. The primary risk is not competition, but user adoption of AI-driven objectivity over human intuition.

## Business Overview

- Current Stage: idea
- Pain Severity: need-to-have
- Traction Summary: Currently in the concept phase with a defined technical architecture and feature set. The founder has identified a clear product roadmap including a modular dual-mode engine and specific API integrations (SEO, App Store) to enhance data fidelity. The strategy is currently focused on validating the core value proposition before full-scale development.
- Customer Evidence: The business concept addresses a validated market gap where existing tools (Trello, Asana) and service providers (Consultants) fail to meet the needs of solo founders and SME innovators. The proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback from early users to confirm product-market fit before committing to heavy AI engineering costs.
- Problem Statement: Early-stage founders face a critical 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current solutions

are broken: project management tools like Trello organize tasks but don't validate viability, while hiring consultants or agencies is too costly and slow for pre-revenue teams. There is no centralized, cost-effective mechanism to objectively score an idea's potential before investing significant capital.

- **Investor Narrative:** Every investor knows the #1 reason startups fail: building something nobody wants. For the solo founder or corporate innovator, the journey from 'idea' to 'venture-backed' is a minefield of expensive guesswork and disconnected tools. They either suffer from 'false confidence,' building in a vacuum, or 'analysis paralysis,' stuck in research mode with no clear path forward. They don't need another to-do list; they need a system that tells them if the to-do list is even worth doing.

Our platform is the first AI-powered 'Chief of Staff' designed to solve this. We don't just organize tasks; we validate the business itself. Through a dual-mode engine, founders can run a rapid '5-Minute Sprint' to test a hypothesis, or trigger a 'Deep Dive' to auto-generate investor-grade financial models, competitor landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

- **Solution Description:** A virtual 'Chief of Staff' SaaS platform that automates the due diligence process. It operates on a dual-mode engine: a '5-Minute Sprint' for rapid, Lean hypothesis testing, and a 'Deep Dive' mode that autonomously generates comprehensive validation reports, financial models, and competitor landscapes. Crucially, the platform features a 'Fundraising Readiness Room' that transforms this validated data directly into investor-ready pitch decks and narratives. By using a model-agnostic backend, the system ensures high-quality, objective output, effectively acting as an active co-founder that guides the user from 'napkin sketch' to 'investor-ready' in a fraction of the traditional time.

## Fast Follower Risk

- **Mitigations:** Focus on workflow integration and user experience (UX) as a lock-in mechanism, not just the model output., Build a 'Data Flywheel': Use the product to generate \*new\* proprietary data that incumbents don't have., Target a niche beachhead where incumbents are too slow to move.
- **Replication Ease:** moderate
- **Time To Replicate:** 6-12 months for a determined incumbent with existing data assets.
- **Established Player Threat:** Critical. Established players (Banks, Hedge Funds, Bloomberg Terminal) already possess the 'Golden Copy' of this data—the own proprietary transaction history. They do not need your dataset to build your product; they only need to copy your feature set.

**Investor Narrative:** We are currently in a 'stealth mode' regarding our defensibility, relying on a temporary data advantage. Our narrative must shift from 'We have unique data' to 'We have a unique workflow that captures unique data.' To survive due diligence, we must demonstrate that our in-house model provides a signal-to-noise ratio that generic models cannot achieve, and we must prove we are building a workflow layer that makes switching painful. Currently, we are vulnerable to the 'Bloomberg Problem'—where incumbents use their superior data to crush our feature set. We need to validate that customers care about this specific output immediately.

## Product Foundation

- **Tech Stack:** Undefined (Conceptual), Hypothetical: React/Next.js (Frontend), Hypothetical: Python/Node.js (Backend), Hypothetical: OpenAI/Anthropic APIs (LLM Layer), Hypothetical: Vector DB (RAG Context)

## Rebuild Risk



- Needed: No
- Reasoning: A rebuild is not applicable as there is no existing product. However, there is a high 'Build vs. Buy' risk. The founder must avoid building a 'wrapper' around GPT-4 that offers no defensibility. The product must be built right the first time (v1) to handle complex data orchestration, or it will fail immediately upon user testing.
- Estimated Cost: N/A (Full build required). Estimated burn for MVP: \$50k - \$100k depending on development source.
- Maturity Level: wireframe

## Technical Debt

- Level: high
- Key Areas: No Codebase: The technical debt is essentially 100% of the future work required., Integration Risk: The 'model-agnostic' promise requires building a complex abstraction layer immediately; failing to do this first will lock the product into a specific vendor (e.g., GPT-4), creating massive refactoring debt later., Data Validation: Using LLMs to generate financial models carries a high risk of 'hallucination'; without a deterministic calculation layer, the output cannot be trusted for investor readiness.
- Mitigation Plan: Prioritize the development of the 'Abstraction Layer' and 'Verification Layer' (code that checks LLM math) in the MVP. Do not build UI features until the backend logic can reliably generate accurate financial models.

## Security Posture

- Gaps: Data Privacy: Handling user ideas and business strategies requires strict data governance to prevent LLM training on user PII or trade secrets., Authentication: No identity management has been architected yet., Input Sanitization: No validation framework to prevent prompt injection attacks that could expose system prompts or data.
- Level: basic
- Product Narrative: While the value proposition addresses a clear market gap in the pre-PMF journey, the technical foundation is currently at the 'Napkin Sketch' stage. For investors, this represents maximum technical risk (Prototype/Penalty phase in Berkus Method). The proposed 'Deep Dive' features are technically ambitious, requiring complex agentic workflows and reliable data extraction—areas where current AI tech frequently struggles with accuracy. The immediate risk is that the team attempts to build a 'Full Stack' solution (Sprints + Deep Dive + Fundraising Room) simultaneously. To reach investor readiness, the technical focus must narrow to a 'Thin Vertical' slice: proving that the AI can generate \*one\* accurate financial model or \*one\* validated market insight before building the surrounding platform.
- Architecture Pattern: Conceptual Service-Oriented Architecture (SOA) proposed, consisting of a dual-mode engine ('Sprint' vs. 'Deep Dive') interfacing with model-agnostic LLM APIs. However, no code repository, data schema, or infrastructure-as-code exists to validate this pattern.

## Scalability Assessment

- Scaling Plan: Must define a strict caching strategy and prompt optimization protocol before v1 to ensure variable costs don't scale linearly with user usage.
- Current Capacity: Zero. The product is a concept. There is no running application to assess capacity.
- Known Bottlenecks: LLM Token Costs: The 'Deep Dive' financial modeling and report generation feature is computationally expensive and prone to high API costs that could destroy unit economics before finding PMF., API Rate Limits: Reliance on third-party data sources (SEO, App Stores) for validation creates external dependency bottlenecks., Context Window Limits: Processing comprehensive 'due diligence' reports requires large context windows, increasing latency and cost.

- Scalability Readiness: low

## Customer Validation

### Beachhead

- Size: 600000
- Definition: Technical Solo Founders and Non-technical Innovators in the UK & US actively validating a B2B or SaaS concept.
- Why This First: This segment suffers the highest 'opportunity cost' from wasted time building the wrong product and has the highest motivation to reach 'fundable' status quickly to secure runway.
- Geographic Scope: UK & US (High English fluency required for high-fidelity AI validation output)

### User Profiles

- 1.
  - Role: First-time Technical Founder / Solopreneur
  - Behaviour: High digital proficiency, comfortable with SaaS tools, actively consuming startup content (Y Combinator, IndieHackers), skeptical of 'magic bullet' solutions.
  - Demographics: Age 25-40, technically literate, located in major tech hubs (London, SF, NY, Remote).
  - Pain Severity: need-to-have
  - Purchasing Power: low
- 2.
  - Role: Corporate Innovator / Intrapreneur
  - Behaviour: Needs to de-risk projects before presenting to boards, values rigorous data over speed, has budget but requires compliance/security.
  - Demographics: Age 30-50, managing innovation initiatives within larger orgs.
  - Pain Severity: need-to-have
  - Purchasing Power: high

### Business Profiles

- 1.
  - Size: Solo (1 person) to Micro-SME (2-10 employees)
  - Type: Pre-seed / Idea-stage Startup Ventures
  - Pain Points: High risk of building features nobody wants (wasted dev capital), Inability to create professional-grade investor materials without expensive consultants, Analysis paralysis preventing go-to-market
  - Switching Costs: Psychological: Ego threat of an AI scoring an idea as 'weak', Process: Changing from ad-hoc note-taking to structured validation workflows, Financial: Adopting a new subscription tool before revenue generation
  - Current Solution: Fragmented stack: Trello/Notion for tasks, Excel for models, ChatGPT for brainstorming, Figma for decks.
  - Willingness To Switch: medium

### Validation Evidence

- Surveys: 0
- Interviews: 0
- Waitlist Size: 0

- Other Evidence: Founder has identified a clear product roadmap and technical architecture., Proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback., Validated market gap identified between PM tools and expensive Consultants.
- Letter Of Intent: 0

## **Preliminary Unit Economics**

- Viable: Yes
- Ltv Cac Ratio: 3
- Estimated C A C: 150
- Estimated L T V: 450

Defensibility Score: 3

# Step 8 - Technical Requirements

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## Functional

- 1.
  - Category: User Management
  - Priority: high
  - Requirement: System shall support multi-tenant User Authentication and Role-Based Access Control (RBAC).
  - Related Features: User Authentication & Onboarding, Incubator Cohort Mode
  - Acceptance Criteria: Users can register/login via Email/Password and Social OAuth (Google), System distinguishes between 'Founder', 'Innovation Team', and 'Program Director' roles, 'Program Directors' can view dashboards of their assigned cohort members only, Users can be associated with an 'Organization' entity for team billing
- 2.
  - Category: AI Core
  - Priority: critical
  - Requirement: System shall implement a Model-Agnostic Router to dynamically select LLM providers.
  - Related Features: Model-Agnostic Backend, 6-Pillar Deep Dive Generator
  - Acceptance Criteria: Router selects 'High Reasoning' model (e.g., Claude 3.5) for Deep Dive analysis, Router selects 'High Creativity/Temp' model (e.g., GPT-4o) for Smart Narrative Building, System allows admin configuration of API keys per provider in the backend, Router automatically retries with a fallback provider if primary fails
- 3.
  - Category: Validation Engine
  - Priority: high
  - Requirement: System shall provide a '5-Minute Sprint' guided workflow with a countdown timer.
  - Related Features: 5-Minute Sprint Engine, Progress Tracking & Idea Vault
  - Acceptance Criteria: Interface displays a persistent countdown timer starting at 5:00, System captures Hypothesis, Target Audience, and UVP inputs sequentially, Upon expiry or submission, system returns a 'Go/No-Go' score and critique, Sprint data is auto-saved to the 'Idea Vault' associated with a Project
- 4.
  - Category: Data Processing
  - Priority: high
  - Requirement: System shall autonomously generate a 6-Pillar Deep Dive Report.
  - Related Features: 6-Pillar Deep Dive Generator, Financial Modeling Engine
  - Acceptance Criteria: Agent scrapes live web data for Market Size and Competitor Analysis, System generates structured JSON output for all 6 pillars, Processing status is visible to user (Queued, Processing, Completed), System handles Unit Economics calculations based on input assumptions
- 5.
  - Category: Financials
  - Priority: medium
  - Requirement: System shall generate a structured Financial Model (P&L, Cash Flow, Burn Rate).
  - Related Features: Financial Modeling Engine
  - Acceptance Criteria: Model uses structured logic/math verification rather than pure text generation,

Outputs are exportable to CSV or Excel format, Financial assumptions are editable by the user to re-run projections, Charts visualize Runway and Revenue growth

- 6.
  - Category: Visualization
  - Priority: medium
  - Requirement: System shall render a Competitor Landscape Visualizer matrix.
  - Related Features: Competitor Landscape Visualizer
  - Acceptance Criteria: 2D Matrix plots competitors on X/Y axes (e.g., Price vs. Capability), Visualizer highlights 'Blue Ocean' whitespace opportunities, Data is sourced dynamically from the Deep Dive Report entity
- 7.
  - Category: Document Generation
  - Priority: high
  - Requirement: System shall auto-generate Pitch Decks in the Fundraising Readiness Room.
  - Related Features: Fundraising Readiness Room, Smart Narrative Builder
  - Acceptance Criteria: System imports validated data from DeepDiveReport entity, Smart Narrative Builder suggests emotional hooks for the 'Story' slide, Financial Model data auto-populates the 'Ask' slide, Output supports export to PDF and PPTX formats
- 8.
  - Category: Iterative Logic
  - Priority: medium
  - Requirement: System shall support Hypothesis Tracking and Versioning.
  - Related Features: Interactive Hypothesis Tracker, Progress Tracking & Idea Vault
  - Acceptance Criteria: Users can create V2 of a Sprint/Project, System maintains a side-by-side comparison view of V1 vs V2 Validation Scores, Trend lines show improvement or decline in validation metrics over time
- 9.
  - Category: Integration
  - Priority: low
  - Requirement: System shall allow external data ingestion via an Integration Hub.
  - Related Features: Integration Hub (No-Code/API)
  - Acceptance Criteria: API endpoints accept webhooks from Stripe (Revenue data), Users can manually input API keys for Google Analytics, External data updates the Financial Model automatically

Assumptions: Users have a stable internet connection to support real-time AI generation., LLM providers (OpenAI, Anthropic) will maintain API uptime and rate limits suitable for our load., Users have basic literacy regarding startup terminology (e.g., 'Burn Rate', 'Unit Economics')., Web scraping for the Deep Dive complies with robots.txt of target sources., Stripe revenue data is accurate for financial modeling inputs.

## Constraints

- 1.
  - Type: technical
  - Impact: Increases initial backend complexity but prevents vendor lock-in and optimizes costs.
  - Description: Must use a Model-Agnostic architecture (OpenAI, Anthropic, Meta).
- 2.
  - Type: regulatory
  - Impact: Requires strict data retention policies and 'Right to be Forgotten' implementation.
  - Description: Compliance with GDPR and CCPA for handling user ideas and data.
- 3.
  - Type: business
  - Impact: Requires aggressive caching and prompt optimization to maintain margins.

- Description: LLM API costs must remain lower than consulting alternatives.
- 4.
  - Type: technical
  - Impact: Requires libraries like D3.js, Recharts, or Highcharts.
  - Description: Frontend must support dynamic data visualization (Charts/Matrix).

## Integrations

- OpenAI API
  - Type: ai
  - Purpose: Primary LLM for creative tasks (Narrative Builder) and fallback.
  - Provider: OpenAI
  - Complexity: high
  - Estimated Hours: 60
- Anthropic Claude API
  - Type: ai
  - Purpose: Primary LLM for high-reasoning tasks (Deep Dive, Financial Logic).
  - Provider: Anthropic
  - Complexity: high
  - Estimated Hours: 60
- Tavily / Serper
  - Type: search
  - Purpose: Real-time web data scraping for Competitor Analysis and Market Sizing.
  - Provider: Tavily / Serper
  - Complexity: medium
  - Estimated Hours: 24
- Stripe
  - Type: payments
  - Purpose: Subscription billing and revenue data ingestion for Financial Models.
  - Provider: Stripe
  - Complexity: medium
  - Estimated Hours: 40
- Vercel Blob Store / AWS S3
  - Type: storage
  - Purpose: Storage for generated Pitch Decks (PPTX/PDF) and Report assets.
  - Provider: Vercel / AWS
  - Complexity: low
  - Estimated Hours: 16

## Non Functional

- 1.
  - Metric: Latency
  - Target: < 500ms for input reflection during countdown
  - Category: Performance
  - Requirement: 5-Minute Sprint interface must be highly responsive.
- 2.
  - Metric: Total Processing Time
  - Target: < 5 minutes for full 6-pillar generation
  - Category: Performance

- Requirement: Deep Dive Report generation must complete within a reasonable timeframe.
- 3.
  - Metric: Concurrent Users
  - Target: Support 50 concurrent Deep Dive generations without queue timeout > 2 mins
  - Category: Scalability
  - Requirement: System must handle concurrent Deep Dive generation for incubator cohorts.
- 4.
  - Metric: SUS Score
  - Target: Score > 80 (System Usability Scale)
  - Category: Usability
  - Requirement: Platform must be accessible to non-technical founders.
- 5.
  - Metric: Uptime
  - Target: 99.9% availability (SLA)
  - Category: Availability
  - Requirement: System uptime must support global users across time zones.

## Security Requirements

- 1.
  - Category: Data Privacy
  - Priority: critical
  - Requirement: Ensure strict isolation of user data and ideas.
  - Implementation: Row-level security in database to ensure users can only access their own or their org's data. Multi-tenancy ID checks on every API call.
- 2.
  - Category: API Security
  - Priority: critical
  - Requirement: Secure LLM Provider API Keys.
  - Implementation: All API keys stored in encrypted environment variables (e.g., AWS Secrets Manager). Never exposed to client-side code.
- 3.
  - Category: Input Validation
  - Priority: high
  - Requirement: Prevent Prompt Injection attacks.
  - Implementation: Sanitize all user inputs before sending to LLMs. Implement strict allow-listing for prompt templates.
- 4.
  - Category: Authentication
  - Priority: high
  - Requirement: Secure Session Management.
  - Implementation: Use HTTPOnly cookies for JWT tokens. Implement CSRF protection.
- 5.
  - Category: Audit
  - Priority: medium
  - Requirement: Audit Logging for Sensitive Actions.
  - Implementation: Log all Project deletions, Pitch Deck exports, and Incubator access attempts in the AuditLog entity.

# Step 9 - Architecture Planning

---

## Components

- Web Application Firewall & CDN
  - Type: edge
  - Responsibilities: DDoS protection, Global content caching, Static asset delivery, SSL termination
- Frontend Client
  - Type: frontend
  - Responsibilities: Sprint countdown timer logic, Real-time UI updates for Deep Dive status, Pitch deck visualization, Financial model interactive charts
- API Gateway
  - Type: backend
  - Responsibilities: Request routing, JWT authentication verification, Rate limiting (per org), Request validation
- Auth Service
  - Type: backend
  - Responsibilities: User registration/login, Organization management, Role-Based Access Control (RBAC), Multi-tenant isolation
- Core API Service
  - Type: backend
  - Responsibilities: Sprint data CRUD, Project state management, Idea Vault retrieval, User profile management
- AI Orchestrator Service
  - Type: backend
  - Responsibilities: LLM Provider selection (Router), Prompt template management, Context window optimization, Cost tracking per token
- Worker Service
  - Type: backend
  - Responsibilities: Process 6-Pillar Deep Dive generation, Scrape web data (via Tavily/Serper), Generate Financial Models, Render PPTX/PDF exports, Update Integration Logs
- Webhook Handler
  - Type: backend
  - Responsibilities: Ingest Stripe revenue data, Process OAuth callbacks, Validate external payloads
- Real-time Service
  - Type: backend
  - Responsibilities: Broadcast Deep Dive progress, Live countdown synchronization, Collaborative cohort updates

Design Patterns: Event-Driven Microservices with AI Orchestration Layer

## Scalability Plan

### Strategy

- Limits: Max 100 concurrent workers. Database connection pooling limit set to 20 per instance.



- Approach: Horizontal Scaling with Queue-Based Throttling
- Triggers: Queue Depth > 20 jobs, CPU > 60% sustained, Memory > 75%
- Cost Implications: Workers scale to zero when idle. Cost primarily driven by LLM token usage and DB storage. Estimated \$2k/mo at 1000 active users.
- Bottlenecks: LLM API Rate Limits (OpenAI/Anthropic), PostgreSQL connection limits during heavy cohort usage, PDF/PPTX generation memory usage
- Mitigations: Implement retry logic with exponential backoff in the AI Orchestrator, Use PgBouncer for connection pooling, Offload file generation to a dedicated high-memory worker pod

Scalability Notes: Horizontal Scaling with Queue-Based Throttling scaling: Max 100 concurrent workers. Database connection pooling limit set to 20 per instance.

## Tech Stack Choices

- 1.
  - Category: frontend
  - Reasoning: Server components for fast initial load, client components for the interactive Sprint timer. ShadcnUI provides accessible, professional components needed for the 'System Usability Scale > 80' requirement.
  - Tradeoffs: Next.js API routes can be limiting for long-running tasks, necessitating the worker tier.
  - Technology: Next.js 14 + TailwindCSS + ShadcnUI
  - Alternatives: Remix, Vue 3
- 2.
  - Category: backend
  - Reasoning: Node.js handles the high-I/O web requests efficiently. Python is preferred for the AI Worker/AI Orchestrator due to superior library support for data processing (Pandas for financial models) and AI agent frameworks.
  - Tradeoffs: Maintaining two languages increases DevOps complexity, but offers better performance for specific tasks.
  - Technology: Node.js (NestJS) + Python (FastAPI)
  - Alternatives: Go, Java Spring
- 3.
  - Category: database
  - Reasoning: Relational integrity is crucial for the complex relationships (Org -> User -> Project -> Report). JSONB support allows storing the flexible '6-Pillar' data structures efficiently.
  - Tradeoffs: PostgreSQL scaling requires tuning (connection pooling) compared to NoSQL, but offers ACID guarantees essential for financial data.
  - Technology: PostgreSQL (Supabase or AWS RDS)
  - Alternatives: MySQL, MongoDB
- 4.
  - Category: queue
  - Reasoning: In-memory data store used for caching Sprint states and managing the Job Queue. This ensures the 50 concurrent Deep Dive generations don't crash the server.
  - Tradeoffs: Redis requires persistence configuration to avoid job loss on restart, but offers the lowest latency.
  - Technology: Redis (BullMQ)
  - Alternatives: RabbitMQ, AWS SQS
- 5.
  - Category: ai\_integration
  - Reasoning: Provides the abstraction layer (Model-Agnostic Backend) to switch between GPT-4o (Creative) and Claude 3.5 Sonnet (Reasoning) dynamically based on the feature being used.
  - Tradeoffs: Abstraction layers add overhead, but drastically simplify prompt management and provider

swapping.

- Technology: LangChain / Vercel AI SDK
- Alternatives: Direct API calls, Azure OpenAI
- 6.
  - Category: file\_storage
  - Reasoning: Scalable storage for generated Pitch Decks (PPTX) and PDF reports. Presigned URLs allow secure, direct access for users.
  - Tradeoffs: Costs scale with storage and egress traffic.
  - Technology: AWS S3 / Vercel Blob
  - Alternatives: Google Cloud Storage

## Deployment Topology

- Architecture: Hybrid Serverless + Containerized. Frontend is Serverless (Vercel) for edge speed. Backend is containerized (ECS) to control long-running AI tasks and connection pooling.

## Environments

- 1.
  - Provider: Local Docker
  - Services: Frontend, API, Worker, Redis, Postgres
  - Environment: development
  - Configuration: Docker Compose with hot-reloading for rapid iteration of Sprints.
- 2.
  - Provider: Vercel (Frontend) + AWS ECS (Backend)
  - Services: Preview Deployments, Shared Testing DB
  - Environment: staging
  - Configuration: Auto-deploy on commit to main branch for QA testing of Deep Dive logic.
- 3.
  - Provider: Vercel (Edge) + AWS (ECS/Fargate) + ElastiCache
  - Services: All Services, CDN, Load Balancers
  - Environment: production
  - Configuration: Multi-AZ deployment for 99.9% availability. Auto-scaling workers based on queue depth.
- Orchestration: AWS ECS or Kubernetes (if self-hosted)
- Containerization: Yes

## Monitoring Strategy

- Tools: Datadog / New Relic (APM), Sentry (Error Tracking), LangSmith / PromptLayer (LLM Monitoring), Grafana (Metrics Dashboards)
- Metrics: Time to Generate Deep Dive (Target < 5m), Sprint Input Latency (Target < 500ms), LLM Token Usage & Cost per Feature, Worker Queue Depth, Failed Login Attempts
- Alerting: Slack/PagerDuty integration for API failures, Queue congestion, or LLM rate limit hits.

Architecture Diagram: graph TB

```
subgraph Client
  A[Web Browser]
  B[Mobile App]
end
```

```
subgraph Edge_Security
  C[WAF & CDN]
end
```

```

subgraph Frontend_Tier
  D[Next.js Frontend]
end

subgraph Backend_Layer
  E[API Gateway]
  F[Auth Service]
  G[Core API]
  H[Webhook Handler]
end

subgraph Async_Layer
  I[Redis Queue & Cache]
  J[AI Orchestrator Router]
  K[Worker Service]
end

subgraph External_AI_Providers
  L[OpenAI API]
  M[Anthropic API]
  N[Search API Tavily]
end

subgraph Data_Layer
  O[(PostgreSQL DB)]
  P[(S3 Object Store)]
end

A --> C
B --> C
C --> D
D --> E
E --> F
E --> G
E --> H
G --> I
H --> I
I --> J
J --> K
K --> L
K --> M
K --> N
G --> O
K --> O
K --> P
K -.->|WebSocket| D

```

## Architecture Pattern

- Reasoning: The '5-Minute Sprint' requires low-latency synchronous communication (<500ms), while the 'Deep Dive' and 'Financial Modeling' are compute-heavy, variable-duration tasks (up to 5 minutes). An event-driven approach with queues prevents resource exhaustion during concurrent cohort processing and allows the 'Model-Agnostic Router' to intelligently switch between LLM providers (OpenAI vs. Claude) based on task requirements without blocking the main application thread.
- Description: A hybrid architecture utilizing synchronous REST for user interactions (Sprints) and asynchronous message queues for long-running AI tasks (Deep Dives).

Security Considerations: Row-Level Security (RLS) enabled in PostgreSQL to ensure Organizations can only see their own data., API Gateway validates JWTs on every request before passing to internal services., PII redaction within the AI Orchestrator before sending data to external LLMs (GDPR/CCPA compliance)., Signed URLs (S3 Presigned URLs) for accessing sensitive Pitch Decks and Reports., Input sanitization on the Sprint input to prevent prompt injection attacks against the LLMs.

# Step 9 - Financial Projections

---

## Burn Rate

- Runway Months: 48
- Current Monthly: 2500000

Warnings: SOM (Serviceable Obtainable Market) was not defined in Step 5. Cannot validate Year 5 revenue (£1.35m) against market cap., LTV:CAC ratio is exactly 3.0. This is the minimum threshold for viability. Any increase in churn or CAC will break unit economics., Revenue starts at zero in Month 1. Ensure sufficient cash reserves are available to cover the first 6 months of operations.

## Sensitivity

### Base

- Description: Standard growth model with 2.5% monthly churn and consistent sales execution.
- Year5 Revenue: 135000000

### Best

- Description: Aggressive expansion with viral adoption and upsell opportunities maximizing LTV.
- Year5 Revenue: 202500000

### Worst

- Description: Conservative churn of 5% and slower sales velocity due to market entry friction.
- Year5 Revenue: 81000000

## Annual Summary

- 1.
  - Year: 1
  - Ebitda: -12000000
  - Cash End: 981250000
  - Revenue: 12000000
  - Headcount: 3
  - Gross Margin Pct: 0.9
- 2.
  - Year: 2
  - Ebitda: 5400000
  - Cash End: 982450000
  - Revenue: 54000000
  - Headcount: 5
  - Gross Margin Pct: 0.9
- 3.
  - Year: 3

- Ebitda: 19800000
- Cash End: 1004050000
- Revenue: 81000000
- Headcount: 9
- Gross Margin Pct: 0.9
- 4.
  - Year: 4
  - Ebitda: 34200000
  - Cash End: 1058250000
  - Revenue: 108000000
  - Headcount: 12
  - Gross Margin Pct: 0.9
- 5.
  - Year: 5
  - Ebitda: 48600000
  - Cash End: 1136850000
  - Revenue: 135000000
  - Headcount: 12
  - Gross Margin Pct: 0.9

## Unit Economics

- Cac: 250000
- Ltv: 750000
- Ltv Cac Ratio: 3
- Payback Months: 10

## Key Assumptions

- 1.
  - Assumption: Initial CAC of £2,500 per customer.
  - Impact If Wrong: Higher CAC will significantly extend payback period and reduce runway.
  - Source Or Justification: Based on industry benchmarks for B2B SaaS with direct sales teams.
- 2.
  - Assumption: Monthly churn rate is capped at 2.5%.
  - Impact If Wrong: Increased churn will destroy LTV and make unit economics unviable.
  - Source Or Justification: Assumes high product-market fit and sticky proprietary AI data.
- 3.
  - Assumption: Average Revenue Per User (ARPU) is £25,000 annually.
  - Impact If Wrong: Lower pricing will require significantly higher volume to hit targets.
  - Source Or Justification: Derived from proposed pricing tiers for enterprise-grade AI analytics.
- 4.
  - Assumption: 90% Gross Margin on software services.
  - Impact If Wrong: Lower margins will reduce EBITDA and require more capital to scale.
  - Source Or Justification: Standard for SaaS; assumes low incremental compute cost per user.
- 5.
  - Assumption: Headcount costs scale linearly with team size.
  - Impact If Wrong: Rising salary demands could increase burn rate faster than anticipated.
  - Source Or Justification: Assumes average salary of £83,000 per employee fully burdened.

## Monthly Projections

- 1.
  - Cogs: 0
  - Month: 1
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 997500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 2.
  - Cogs: 0
  - Month: 2
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 995000000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 3.
  - Cogs: 0
  - Month: 3
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 992500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 4.
  - Cogs: 50000
  - Month: 4
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 990450000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 2
  - Churned Customers: 0

- Operating Expenses: 2500000
- 5.
  - Cogs: 50000
  - Month: 5
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 988400000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 4
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 6.
  - Cogs: 100000
  - Month: 6
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 986800000
  - Gross Profit: 900000
  - New Customers: 2
  - Total Customers: 6
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 7.
  - Cogs: 100000
  - Month: 7
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 985200000
  - Gross Profit: 900000
  - New Customers: 3
  - Total Customers: 9
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 8.
  - Cogs: 150000
  - Month: 8
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 984050000
  - Gross Profit: 1350000
  - New Customers: 3
  - Total Customers: 12
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 9.

- Cogs: 150000
- Month: 9
- Ebitda: -1150000
- Revenue: 1500000
- Cash Burn: 1150000
- Cash Balance: 982900000
- Gross Profit: 1350000
- New Customers: 4
- Total Customers: 16
- Churned Customers: 0
- Operating Expenses: 2500000
- 10.
  - Cogs: 200000
  - Month: 10
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 982200000
  - Gross Profit: 1800000
  - New Customers: 4
  - Total Customers: 20
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 11.
  - Cogs: 200000
  - Month: 11
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 981500000
  - Gross Profit: 1800000
  - New Customers: 5
  - Total Customers: 25
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 12.
  - Cogs: 250000
  - Month: 12
  - Ebitda: -250000
  - Revenue: 2500000
  - Cash Burn: 250000
  - Cash Balance: 981250000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 30
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 13.
  - Cogs: 250000
  - Month: 13



- Ebitda: -1250000
- Revenue: 2500000
- Cash Burn: 1250000
- Cash Balance: 980000000
- Gross Profit: 2250000
- New Customers: 5
- Total Customers: 34
- Churned Customers: 1
- Operating Expenses: 3500000
- 14.
  - Cogs: 300000
  - Month: 14
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 979200000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 39
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 15.
  - Cogs: 300000
  - Month: 15
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 978400000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 44
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 16.
  - Cogs: 350000
  - Month: 16
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 978050000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 50
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 17.
  - Cogs: 350000
  - Month: 17
  - Ebitda: -350000
  - Revenue: 3500000

- Cash Burn: 350000
- Cash Balance: 977700000
- Gross Profit: 3150000
- New Customers: 7
- Total Customers: 56
- Churned Customers: 1
- Operating Expenses: 3500000
- 18.
  - Cogs: 400000
  - Month: 18
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977800000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 63
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 19.
  - Cogs: 400000
  - Month: 19
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977900000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 70
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 20.
  - Cogs: 450000
  - Month: 20
  - Ebitda: 550000
  - Revenue: 4500000
  - Cash Burn: 0
  - Cash Balance: 978450000
  - Gross Profit: 4050000
  - New Customers: 9
  - Total Customers: 78
  - Churned Customers: 1
  - Operating Expenses: 3500000
- (16 more items)

# Step 9 - System Architecture

---

## Components

- Web Application Firewall & CDN
  - Type: edge
  - Ports: HTTPS 443, HTTP 80
  - Technology: Cloudflare
  - Responsibilities: DDoS protection, Global content caching, Static asset delivery, SSL termination
- Frontend Client
  - Type: frontend
  - Ports: HTTPS 443
  - Technology: Next.js 14 (App Router)
  - Dependencies: API Gateway
  - Responsibilities: Sprint countdown timer logic, Real-time UI updates for Deep Dive status, Pitch deck visualization, Financial model interactive charts
- API Gateway
  - Type: backend
  - Ports: HTTPS 443
  - Technology: AWS API Gateway / Express.js
  - Dependencies: Auth Service, Core API, AI Orchestrator
  - Responsibilities: Request routing, JWT authentication verification, Rate limiting (per org), Request validation
- Auth Service
  - Type: backend
  - Ports: HTTPS 443
  - Technology: Clerk / Auth0
  - Dependencies: User Database
  - Responsibilities: User registration/login, Organization management, Role-Based Access Control (RBAC), Multi-tenant isolation
- Core API Service
  - Type: backend
  - Ports: Internal 3000
  - Technology: Node.js / NestJS
  - Dependencies: Primary Database, Redis Cache
  - Responsibilities: Sprint data CRUD, Project state management, Idea Vault retrieval, User profile management
- AI Orchestrator Service
  - Type: backend
  - Ports: Internal 3001
  - Technology: Python (FastAPI) or Node.js
  - Dependencies: Task Queue, Vector DB, LLM APIs
  - Responsibilities: LLM Provider selection (Router), Prompt template management, Context window optimization, Cost tracking per token
- Worker Service

- Type: backend
- Ports: Internal
- Technology: Node.js / BullMQ
- Dependencies: Task Queue, Primary Database, Object Storage, External APIs
- Responsibilities: Process 6-Pillar Deep Dive generation, Scrape web data (via Tavily/Serper), Generate Financial Models, Render PPTX/PDF exports, Update Integration Logs
- Webhook Handler
  - Type: backend
  - Ports: HTTPS 443
  - Technology: Node.js / Express
  - Dependencies: Core API, Task Queue
  - Responsibilities: Ingest Stripe revenue data, Process OAuth callbacks, Validate external payloads
- Real-time Service
  - Type: backend
  - Ports: WSS 443
  - Technology: Pusher / Ably
  - Dependencies: Frontend Client, Worker Service
  - Responsibilities: Broadcast Deep Dive progress, Live countdown synchronization, Collaborative cohort updates

Design Patterns: Event-Driven Microservices with AI Orchestration Layer

Mermaid Diagram: graph TB

```

subgraph Client
  A[Web Browser]
  B[Mobile App]
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```

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end

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subgraph Frontend_Tier
  D[Next.js Frontend]
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```

```

subgraph Backend_Layer
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  G[Core API]
  H[Webhook Handler]
end

```

```

subgraph Async_Layer
  I[Redis Queue & Cache]
  J[AI Orchestrator Router]
  K[Worker Service]
end

```

```

subgraph External_AI_Providers
  L[OpenAI API]
  M[Anthropic API]
  N[Search API Tavily]
end

```

```

subgraph Data_Layer
  O[(PostgreSQL DB)]
  P[(S3 Object Store)]
end

```

A --> C

```

B --> C
C --> D
D --> E
E --> F
E --> G
E --> H
G --> I
H --> I
I --> J
J --> K
K --> L
K --> M
K --> N
G --> O
K --> O
K --> P
K -. -> |WebSocket| D

```

## Scalability Plan

### Strategy

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- Triggers: Queue Depth > 20 jobs, CPU > 60% sustained, Memory > 75%
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- 1.
  - Category: frontend
  - Reasoning: Server components for fast initial load, client components for the interactive Sprint timer. ShadcnUI provides accessible, professional components needed for the 'System Usability Scale > 80' requirement.
  - Tradeoffs: Next.js API routes can be limiting for long-running tasks, necessitating the worker tier.
  - Technology: Next.js 14 + TailwindCSS + ShadcnUI
  - Alternatives: Remix, Vue 3
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  - Category: backend
  - Reasoning: Node.js handles the high-I/O web requests efficiently. Python is preferred for the AI Worker/AI Orchestrator due to superior library support for data processing (Pandas for financial models) and AI agent frameworks.
  - Tradeoffs: Maintaining two languages increases DevOps complexity, but offers better performance for specific tasks.
  - Technology: Node.js (NestJS) + Python (FastAPI)
  - Alternatives: Go, Java Spring
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- Tradeoffs: PostgreSQL scaling requires tuning (connection pooling) compared to NoSQL, but offers ACID guarantees essential for financial data.
- Technology: PostgreSQL (Supabase or AWS RDS)
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  - Reasoning: In-memory data store used for caching Sprint states and managing the Job Queue. This ensures the 50 concurrent Deep Dive generations don't crash the server.
  - Tradeoffs: Redis requires persistence configuration to avoid job loss on restart, but offers the lowest latency.
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  - Tradeoffs: Abstraction layers add overhead, but drastically simplify prompt management and provider swapping.
  - Technology: LangChain / Vercel AI SDK
  - Alternatives: Direct API calls, Azure OpenAI
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  - Category: file\_storage
  - Reasoning: Scalable storage for generated Pitch Decks (PPTX) and PDF reports. Presigned URLs allow secure, direct access for users.
  - Tradeoffs: Costs scale with storage and egress traffic.
  - Technology: AWS S3 / Vercel Blob
  - Alternatives: Google Cloud Storage

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  - Environment: development
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  - Provider: Vercel (Frontend) + AWS ECS (Backend)
  - Services: Preview Deployments, Shared Testing DB
  - Environment: staging
  - Configuration: Auto-deploy on commit to main branch for QA testing of Deep Dive logic.
- 3.
  - Provider: Vercel (Edge) + AWS (ECS/Fargate) + ElastiCache
  - Services: All Services, CDN, Load Balancers

- Environment: production
- Configuration: Multi-AZ deployment for 99.9% availability. Auto-scaling workers based on queue depth.
- Orchestration: AWS ECS or Kubernetes (if self-hosted)
- Containerization: Yes

## Monitoring Strategy

- Tools: Datadog / New Relic (APM), Sentry (Error Tracking), LangSmith / PromptLayer (LLM Monitoring), Grafana (Metrics Dashboards)
- Metrics: Time to Generate Deep Dive (Target < 5m), Sprint Input Latency (Target < 500ms), LLM Token Usage & Cost per Feature, Worker Queue Depth, Failed Login Attempts
- Alerting: Slack/PagerDuty integration for API failures, Queue congestion, or LLM rate limit hits.

Architecture Diagram: graph TB

subgraph Client

A[Web Browser]

B[Mobile App]

end

subgraph Edge\_Security

C[WAF & CDN]

end

subgraph Frontend\_Tier

D[Next.js Frontend]

end

subgraph Backend\_Layer

E[API Gateway]

F[Auth Service]

G[Core API]

H[Webhook Handler]

end

subgraph Async\_Layer

I[Redis Queue & Cache]

J[AI Orchestrator Router]

K[Worker Service]

end

subgraph External\_AI\_Providers

L[OpenAI API]

M[Anthropic API]

N[Search API Tavily]

end

subgraph Data\_Layer

O[(PostgreSQL DB)]

P[(S3 Object Store)]

end

A --> C

B --> C

C --> D

D --> E

E --> F

E --> G

E --> H

G --> I

H --> I

I --> J

J --> K  
K --> L  
K --> M  
K --> N  
G --> O  
K --> O  
K --> P  
K -. -> |WebSocket| D

## Architecture Pattern

- Reasoning: The '5-Minute Sprint' requires low-latency synchronous communication (<500ms), while the 'Deep Dive' and 'Financial Modeling' are compute-heavy, variable-duration tasks (up to 5 minutes). An event-driven approach with queues prevents resource exhaustion during concurrent cohort processing and allows the 'Model-Agnostic Router' to intelligently switch between LLM providers (OpenAI vs. Claude) based on task requirements without blocking the main application thread.
- Description: A hybrid architecture utilizing synchronous REST for user interactions (Sprints) and asynchronous message queues for long-running AI tasks (Deep Dives).

Security Considerations: Row-Level Security (RLS) enabled in PostgreSQL to ensure Organizations can only see their own data., API Gateway validates JWTs on every request before passing to internal services., PII redaction within the AI Orchestrator before sending data to external LLMs (GDPR/CCPA compliance)., Signed URLs (S3 Presigned URLs) for accessing sensitive Pitch Decks and Reports., Input sanitization on the Sprint input to prevent prompt injection attacks against the LLMs.



# Step 10 - Funding Requirements

---

Currency: GBP

Warnings: CRITICAL RUNWAY MISMATCH: The user input suggests a 48-month runway based on a £25k burn, but a £300k raise divided by £25k burn equals 12 months. The model has adjusted the runway to 12 months to match the financial reality of the raise., Headcount growth is extremely conservative (reaching only 12 employees by Year 5), which may limit the ability to scale revenue aggressively without automation.

## Next Round

- Estimated Amount: 100000000
- Estimated Timing: Q4 2026
- Milestones Required: Fully functional proprietary AI model, 20+ paying customers with confirmed retention, CAC recovered within 12 months

## Use Of Funds

- 1.
  - Amount: 15000000
  - Category: Product Development
  - Percentage: 0.5
  - Justification: Hire lead AI engineer and data architect to build proprietary model and integrate exclusive senior investor datasets.
- 2.
  - Amount: 9000000
  - Category: Sales & Marketing
  - Percentage: 0.3
  - Justification: Validate product-market fit by acquiring first 10 pilot customers and proving the 3x LTV:CAC ratio.
- 3.
  - Amount: 6000000
  - Category: Operations & Overhead
  - Percentage: 0.2
  - Justification: Cover server costs, proprietary data licensing fees, and founder living expenses for 24 months.

Raise Amount: 30000000

## Prior Funding

- Raised: 0
- Sources: Bootstrapped
- Current Cap Table: 100% Founders

## Dilution Model

- 1.
  - Round: Pre-seed
  - Equity Given: 0.2

- Raise Amount: 300000000
- Founder Ownership: 0.8
- Pre Money Valuation: 1200000000
- Post Money Valuation: 1500000000
- 2.
  - Round: Seed
  - Equity Given: 0.2
  - Raise Amount: 1000000000
  - Founder Ownership: 0.64
  - Pre Money Valuation: 4000000000
  - Post Money Valuation: 5000000000
- 3.
  - Round: Series A
  - Equity Given: 0.2
  - Raise Amount: 3000000000
  - Founder Ownership: 0.51
  - Pre Money Valuation: 12000000000
  - Post Money Valuation: 15000000000

Raise Rationale: Raising £300k to secure 24 months of runway, allowing the team to build the proprietary MVP, secure the exclusive senior investor datasets, and validate the LTV:CAC model with initial pilot customers before a Seed raise.

## Runway From Raise

- Months: 12
- Milestones Achievable: Build and launch proprietary AI MVP trained on exclusive datasets, Secure first 10 paying customers and validate unit economics

Investor Rationale: Defensible moat via exclusive proprietary datasets unavailable to competitors, validated by a strong 3x LTV:CAC ratio and a lean, high-margin operational model.

Structure Rationale: SEIS/EIS-qualifying equity is recommended for UK angels to maximise tax efficiency. Given the clear valuation metrics and the desire to avoid debt overhang on the cap table, a straight equity round is cleaner than a convertible note for this specific amount.

Investment Structure: equity

# Step 10 - Resource Estimation

---

## Hiring Timeline

- 1.
  - Phase: Phase 1: Architecture & Design
  - Roles: Senior Full-Stack Developer, Product Designer
  - Timeline: Week 1
- 2.
  - Phase: Phase 2: Core AI Engine
  - Roles: Senior AI/Backend Engineer
  - Timeline: Week 2
- 3.
  - Phase: Phase 3: Logic & Validation
  - Roles: Financial Modeling Specialist
  - Timeline: Week 6

## Budget Breakdown

- Tools: 400
- Total: 165510
- External: 10500
- Contingency: 15046
- Development: 129600
- Infrastructure: 3964
- Ai Token Estimate: 6000

## Team Composition

- 1.
  - Role: Senior Full-Stack Developer (Lead)
  - Count: 1
  - Skills: Next.js 14, TypeScript, TailwindCSS, Node.js, Supabase, Vercel
  - Seniority: senior
  - Hourly Rate: 115
  - Hours Per Week: 40
  - Hiring Priority: immediate
  - Responsibilities: Frontend architecture using Next.js App Router, Implementing 5-Minute Sprint interface, Integrating Auth and Database layers, Managing deployment pipelines on Vercel
- 2.
  - Role: Senior AI/Backend Engineer
  - Count: 1
  - Skills: Python, FastAPI, LangChain, OpenAI API, Anthropic API, Redis/BullMQ, Async Programming
  - Seniority: senior
  - Hourly Rate: 135

- Hours Per Week: 40
- Hiring Priority: immediate
- Responsibilities: Building the Model-Agnostic LLM Router, Developing the Deep Dive Agent orchestration logic, Implementing asynchronous queues for long-running tasks, Integrating Tavily/Serper for live web scraping
- 3.
  - Role: Product Designer (UI/UX)
  - Count: 1
  - Skills: Figma, Design Systems, Prototyping, User Research, ShadcnUI
  - Seniority: mid
  - Hourly Rate: 85
  - Hours Per Week: 20
  - Hiring Priority: immediate
  - Responsibilities: Designing the 'Sprint' and 'Deep Dive' user flows, Creating a clean, trust-inspiring dashboard UI, Building component library in Figma, Usability testing for non-technical founders
- 4.
  - Role: Financial Modeling Specialist (Contract)
  - Count: 1
  - Skills: Financial Modeling, Excel/Sheets Logic, Python Pandas, Business Logic
  - Seniority: senior
  - Hourly Rate: 100
  - Hours Per Week: 10
  - Hiring Priority: phase2
  - Responsibilities: Defining logic for P&L and Cash Flow generators, Validating mathematical accuracy of projections, Creating templates for investor-ready reports

## Tools And Services

- Vercel Pro
  - Purpose: Frontend hosting for Next.js application
  - Category: infrastructure
  - Monthly Cost: 20
  - Alternatives: Netlify, AWS Amplify
- Supabase Pro
  - Purpose: PostgreSQL database, Auth, and Real-time subscriptions
  - Category: database
  - Monthly Cost: 25
  - Alternatives: AWS RDS, Neon
- Upstash Redis
  - Purpose: Managed Redis for BullMQ job queues
  - Category: infrastructure
  - Monthly Cost: 10
  - Alternatives: Redis Cloud, Self-hosted Redis
- OpenAI API
  - Purpose: Primary LLM for reasoning and report generation
  - Category: ai\_services
  - Monthly Cost: 500
  - Alternatives: Azure OpenAI, Llama 3 Hosted
- Anthropic API
  - Purpose: Secondary LLM for high-context creative writing (Pitch Decks)

- Category: ai\_services
- Monthly Cost: 300
- Alternatives: OpenAI GPT-4, Google Gemini
- Tavily API
  - Purpose: Deep web search for competitor analysis and market data
  - Category: ai\_services
  - Monthly Cost: 100
  - Alternatives: SerpApi, Browseless
- Sentry
  - Purpose: Error tracking for both Frontend and Python backend
  - Category: monitoring
  - Monthly Cost: 26
  - Alternatives: DataDog, Rollbar
- GitHub Copilot
  - Purpose: Developer productivity tool
  - Category: development
  - Monthly Cost: 10
  - Alternatives: Cursor, Codeium
- LangSmith
  - Purpose: Tracing and debugging complex AI agent chains
  - Category: ai\_observability
  - Monthly Cost: 0
  - Alternatives: Arize Phoenix, Weights & Biases

## External Resources

- 1.
  - Role: AI Strategy Advisor
  - Type: consultant
  - Purpose: Advising on LLM router architecture, prompt engineering strategies for the 'Deep Dive', and cost optimization for token usage.
  - Duration: 4 weeks (ad-hoc)
  - Estimated Cost: 3500
- 2.
  - Role: Brand Identity & Copywriting
  - Type: agency
  - Purpose: Logo design, brand guidelines, and ensuring the AI-generated pitch decks have professional styling.
  - Duration: 2 weeks
  - Estimated Cost: 5000
- 3.
  - Role: Legal (ToS & Privacy)
  - Type: service
  - Purpose: Drafting Terms of Service and Privacy Policy specifically addressing AI data usage and IP rights.
  - Duration: 1 week
  - Estimated Cost: 2000

## Recommended Team Size

- Minimum: 2
- Optimal: 3
- Description: Minimum team of 2 (1 Full-Stack, 1 AI/Backend) can build the MVP in 14-16 weeks. Optimal team of 3 (adding a Designer) reduces time to 10-12 weeks and ensures a polished user experience required for the 'Founder' persona.

Total Monthly Team Cost: 32400

Total Monthly Tools Cost: 991

# Step 10 - Resource Planning

---

## Hiring Timeline

- 1.
  - Phase: Phase 1: Architecture & Design
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  - Category: ai\_services
  - Monthly Cost: 500
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- Anthropic API
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- Category: ai\_services
- Monthly Cost: 300
- Alternatives: OpenAI GPT-4, Google Gemini
- Tavily API
  - Purpose: Deep web search for competitor analysis and market data
  - Category: ai\_services
  - Monthly Cost: 100
  - Alternatives: SerpApi, Browseless
- Sentry
  - Purpose: Error tracking for both Frontend and Python backend
  - Category: monitoring
  - Monthly Cost: 26
  - Alternatives: DataDog, Rollbar
- GitHub Copilot
  - Purpose: Developer productivity tool
  - Category: development
  - Monthly Cost: 10
  - Alternatives: Cursor, Codeium
- LangSmith
  - Purpose: Tracing and debugging complex AI agent chains
  - Category: ai\_observability
  - Monthly Cost: 0
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  - Duration: 4 weeks (ad-hoc)
  - Estimated Cost: 3500
- 2.
  - Role: Brand Identity & Copywriting
  - Type: agency
  - Purpose: Logo design, brand guidelines, and ensuring the AI-generated pitch decks have professional styling.
  - Duration: 2 weeks
  - Estimated Cost: 5000
- 3.
  - Role: Legal (ToS & Privacy)
  - Type: service
  - Purpose: Drafting Terms of Service and Privacy Policy specifically addressing AI data usage and IP rights.
  - Duration: 1 week
  - Estimated Cost: 2000

## Recommended Team Size

- Minimum: 2
- Optimal: 3
- Description: Minimum team of 2 (1 Full-Stack, 1 AI/Backend) can build the MVP in 14-16 weeks. Optimal team of 3 (adding a Designer) reduces time to 10-12 weeks and ensures a polished user experience required for the 'Founder' persona.

Total Monthly Team Cost: 32400

Total Monthly Tools Cost: 991

# Step 11 - Risk Register

---

Warnings: Critical: Burn rate of £2.5M/mo exceeds industry norms for this stage., Critical: 12-month runway is insufficient for the planned 24-month gap to Series B., High: CAC of £250k requires immediate validation of sales model efficiency., Moderate: Lack of defined IP/Patents increases vulnerability to Fast Followers.

## Failure Modes

- 1.
  - Mode: Not Enough Product Need
  - Owner: CEO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Immediately conduct structured customer interviews with 30 senior investors to validate the specific pain points our proprietary dataset addresses. Pivot the product definition based on the top 3 recurring needs identified.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
  - [...]
  - 2.
  - [...]
- 2.
  - Mode: Running Out of Money
  - Owner: CFO
  - Score: 8
  - Impact: 5
  - Status: open
  - Mitigation: Implement aggressive cash conservation measures immediately. Reduce monthly burn to £1.2M by pausing non-essential hires. Initiate a bridge raise or convertible note discussion 6 months prior to the cliff.
  - Probability: 0.8

## Evidence From Prior Steps

- 1.
  - [...]
  - 2.
  - [...]
- 3.
  - Mode: Gaps in the Team
  - Owner: CEO
  - Score: 6
  - Impact: 4

- Status: open
- Mitigation: Audit current capabilities against the 'AI Development' and 'Enterprise Sales' requirements. Hire a fractional CTO and Sales Lead immediately to plug the gap before the full-time headcount scales up.
- Probability: 0.7

### Evidence From Prior Steps

- 1.
  - [...]
  - 2.
  - [...]
- 4.
  - Mode: Competition
  - Owner: CPO
  - Score: 5
  - Impact: 4
  - Status: open
  - Mitigation: Complete a feature-gap analysis against Bloomberg Terminal and standard LLMs. Emphasize the unique value of the 'senior investor supplied datasets' as the primary differentiator in all pitch materials.
  - Probability: 0.6

### Evidence From Prior Steps

- 1.
  - [...]
  - 2.
  - [...]
- 5.
  - Mode: Fast Followers
  - Owner: CTO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Focus on 'Data Network Effects'—the more the system is used, the smarter the model gets. Lock in key customers with long-term contracts now to build a data lead before incumbents react.
  - Probability: 0.7

### Evidence From Prior Steps

- 1.
  - [...]
  - 2.
  - [...]
- 6.
  - Mode: Pricing Problems
  - Owner: CFO
  - Score: 4
  - Impact: 4
  - Status: open

- Mitigation: Adopt a value-based pricing model tied directly to ROI (e.g., % of assets under management or deal value saved). Offer a pilot program to validate willingness to pay at the £25k level.
- Probability: 0.5

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 7.
  - Mode: Prototype to Product Failure
  - Owner: CTO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Define the v1.0 architecture specifically for scalability (cloud-native, modular). Conduct a third-party technical review of the in-house model to ensure it can handle concurrent user loads before launch.
  - Probability: 0.6

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 8.
  - Mode: Poor Product Timing
  - Owner: CMO
  - Score: 4
  - Impact: 4
  - Status: open
  - Mitigation: Analyze search trends and adoption rates for similar 'AI in Fintech' tools. If the market is lukewarm, position the product as a 'Cost Reduction' tool (recession-proofing) rather than just 'Innovation'.
  - Probability: 0.5

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 9.
  - Mode: Loss of Focus
  - Owner: CEO
  - Score: 3
  - Impact: 4
  - Status: open

- Mitigation: Strictly define the 'Ideal Customer Profile' (ICP) and reject meetings outside this profile for the first 12 months. Board reviews will focus solely on metrics related to this ICP.
- Probability: 0.4

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 10.
  - Mode: Go-To-Market Failure
  - Owner: CRO
  - Score: 7
  - Impact: 5
  - Status: open
  - Mitigation: Shift from direct sales to a high-touch partnership model with existing financial data providers (e.g., Bloomberg, Refinitiv) to lower CAC. Implement an automated lead nurturing system to qualify leads before human contact.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 11.
  - Mode: Co-Founder Conflict
  - Owner: Board
  - Score: 3
  - Impact: 5
  - Status: open
  - Mitigation: Formalize a Founder Agreement with 4-year vesting and 1-year cliff. Establish a weekly 'Founders Alignment' meeting to discuss ideology and strategy differences before they escalate.
  - Probability: 0.3

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 12.
  - Mode: Zombie Corporation
  - Owner: CFO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Set 'Unit Economic Profitability' as the primary goal for Year 2, rather than just revenue growth. Ensure the £30M raise covers the path to cash-flow positive or a clear Series B milestone.

- Probability: 0.6

## **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]

## **Top Risks Ranked**

- 1.
  - Mode: Running Out of Money
  - Score: 8
- 2.
  - Mode: Go-To-Market Failure
  - Score: 7
- 3.
  - Mode: Not Enough Product Need
  - Score: 6

Overall Risk Narrative: Our risk assessment identifies a high-burn, high-reward profile heavily reliant on the successful deployment of our proprietary investor datasets. While our financial runway presents a timing risk relative to our next raise, our primary focus is mitigating the high Customer Acquisition Cost (CAC) through strategic partnerships and validating the acute pain points of senior investors. We are prioritizing capital efficiency and product-market fit above all else to ensure we do not become a Zombie Corporation.

# Step 11 - Sprint Planning

---

## Epics

- Foundational Infrastructure & Auth
  - Status: planned
  - Priority: critical
  - Description: Core platform setup, database schema, authentication, and the model-agnostic AI router backend.
  - Business Value: Enables the system to function and securely manage users while providing the flexibility to swap AI providers.
  - Estimated Sprints: 1
- 5-Minute Sprint Engine
  - Status: planned
  - Priority: critical
  - Description: Interactive guided workflow for rapid hypothesis testing and 'Go/No-Go' scoring.
  - Business Value: Delivers immediate value to users by combating analysis paralysis and validating ideas quickly.
  - Estimated Sprints: 1
- 6-Pillar Deep Dive & Financials
  - Status: planned
  - Priority: high
  - Description: Comprehensive validation agent and financial modeling engine with logic-based math.
  - Business Value: Provides the core 'Chief of Staff' value proposition—generating investor-grade reports and financials autonomously.
  - Estimated Sprints: 2
- Fundraising Readiness Room
  - Status: planned
  - Priority: high
  - Description: Auto-generation of pitch decks and narratives based on validated data.
  - Business Value: Transforms validated data into investable assets, bridging the gap between research and funding.
  - Estimated Sprints: 1
- Dashboard & Tracking
  - Status: planned
  - Priority: medium
  - Description: User dashboard, Idea Vault, and Progress Tracking.
  - Business Value: User retention and engagement hub allowing users to manage multiple projects.
  - Estimated Sprints: 1
- Incubator & Cohort Mode
  - Status: planned
  - Priority: low
  - Description: Multi-seat views for accelerators to manage cohorts.
  - Business Value: Expands market reach to B2B (Accelerators), increasing revenue potential.
  - Estimated Sprints: 1



# Sprints

- Sprint 1: Foundation & Core Infra
  - Goal: Set up the development environment, database, authentication, and the critical AI Router.
  - Risks: Integration issues with specific LLM providers, Database schema changes requiring migration
  - Capacity: 30
  - Duration: 2 weeks
  - Deliverables: Running Next.js + NestJS environment, PostgreSQL Schema finalized, User Auth (Login/Register), AI Router capable of switching between OpenAI/Claude
  - Sprint Number: 1
  - Planned Points: 18
- Sprint 2: The 5-Minute Sprint
  - Goal: Deliver the first user-facing feature: Rapid Hypothesis Validation.
  - Risks: AI response latency might exceed the 'real-time' feel, UX friction with the timer pressure
  - Capacity: 30
  - Duration: 2 weeks
  - Deliverables: Interactive Sprint UI with timer, AI Critique endpoint integration, Go/No-Go scoring algorithm, Saving Sprint results to DB
  - Sprint Number: 2
  - Planned Points: 13
- Sprint 3: Deep Dive & Financials
  - Goal: Build the async engine for heavy research and the logic-based financial modeler.
  - Risks: Financial math logic complexity, Cost of running 6-pillar search queries, Rate limiting on Tavily/Serper APIs
  - Capacity: 30
  - Duration: 2 weeks
  - Deliverables: BullMQ Job Queue for async tasks, 6-Pillar Research Agent logic, Financial Modeling Logic (Specialist focus), Deep Dive data structure
  - Sprint Number: 3
  - Planned Points: 21
- Sprint 4: Reporting & Fundraising
  - Goal: Transform data into polished outputs (Reports and Pitch Decks).
  - Risks: Formatting issues in PPTX export, Mapping unstructured AI text to structured slides
  - Capacity: 30
  - Duration: 2 weeks
  - Deliverables: 6-Pillar PDF Generation, Pitch Deck PPTX Generation, Data consistency check between Report and Deck, Competitor Landscape Visualizer (Basic)
  - Sprint Number: 4
  - Planned Points: 16
- Sprint 5: Dashboard & Polish
  - Goal: Complete the user experience with the Idea Vault and UI polish.
  - Risks: Scope creep on UI polish, Technical debt accumulation
  - Capacity: 30
  - Duration: 2 weeks
  - Deliverables: Main Dashboard with Idea Vault, Project History view, UI/UX refinement (ShadcnUI consistency), Bug fixes from Sprints 1-4
  - Sprint Number: 5
  - Planned Points: 5
- Sprint 6: Incubator Mode & Hardening

- Goal: Deliver B2B features and stabilize the platform for Alpha release.
- Risks: Performance bottlenecks with large data sets, Access control vulnerabilities
- Capacity: 30
- Duration: 2 weeks
- Deliverables: Incubator Cohort Dashboard, Performance optimization, Security audit, Documentation for API
- Sprint Number: 6
- Planned Points: 8

## Mvp Delivery

- Features: User Authentication, 5-Minute Sprint (Go/No-Go), 6-Pillar Deep Dive Report, Financial Models, Basic Dashboard
- Sprint Number: 4

## User Stories

- User Authentication & Roles
  - As A: new founder
  - I Want: to sign up and create an organization
  - Labels: auth, backend
  - So That: I can securely manage my startup projects
  - Priority: critical
  - Story Points: 5
  - Sprint Number: 1
  - Acceptance Criteria: Support Email/Password and OAuth (Google), Users can select role: Founder or Corporate Innovator, Session management via JWT, Organization creation for team isolation
- Model-Agnostic Router
  - As A: system
  - I Want: to route AI requests to different LLMs
  - Labels: backend, ai
  - So That: we can optimize cost and quality per task type
  - Priority: critical
  - Story Points: 8
  - Sprint Number: 1
  - Acceptance Criteria: Router supports OpenAI and Anthropic APIs, Routing logic based on task type (Creative vs. Analytical), Fallback mechanism if primary model fails, Token usage tracking
- Database & Core Entities
  - As A: developer
  - I Want: a normalized database schema
  - Labels: backend, database
  - So That: data integrity is maintained across the app
  - Priority: critical
  - Story Points: 5
  - Sprint Number: 1
  - Acceptance Criteria: PostgreSQL schema set up (User, Org, Project, Sprint, Report), Prisma ORM integration, Migration scripts
- 5-Minute Sprint UI Flow
  - As A: founder
  - I Want: a guided step-by-step input form

- Labels: frontend, ux
- So That: I can articulate my hypothesis quickly
- Priority: critical
- Story Points: 5
- Dependencies: US-001
- Sprint Number: 2
- Acceptance Criteria: Timer component visible to user, Progress bar, Inputs: Hypothesis, Target Audience, UVP, Responsive design (Mobile friendly)
- Sprint AI Critique Logic
  - As A: founder
  - I Want: immediate AI feedback on my inputs
  - Labels: ai, backend
  - So That: I know if my idea has flaws
  - Priority: critical
  - Story Points: 8
  - Dependencies: US-002, US-004
  - Sprint Number: 2
  - Acceptance Criteria: Real-time validation against Lean Startup principles, Generates a 'Go/No-Go' score (0-100), Returns 3 key critiques, Response time < 10 seconds
- Deep Dive Agent Orchestrator
  - As A: founder
  - I Want: to trigger a comprehensive research task
  - Labels: backend, ai
  - So That: I can get a full validation report
  - Priority: high
  - Story Points: 8
  - Dependencies: US-002
  - Sprint Number: 3
  - Acceptance Criteria: Async job queue (BullMQ) setup, Agent breaks down task into 6 pillars, Status updates (Queued, Researching, Writing, Done), Error handling for API failures
- Financial Modeling Engine
  - As A: founder
  - I Want: to generate financial projections
  - Labels: backend, specialist
  - So That: I can show investors my unit economics
  - Priority: high
  - Story Points: 13
  - Dependencies: US-003
  - Sprint Number: 3
  - Acceptance Criteria: Inputs: CAC, LTV, Burn Rate, Revenue Streams, Logic engine generates P&L, Cash Flow, Validates math integrity (No AI hallucinations for math), Exports to CSV/Excel
- 6-Pillar Report Generation
  - As A: founder
  - I Want: a polished PDF report
  - Labels: frontend, ai
  - So That: I can present it to stakeholders
  - Priority: high
  - Story Points: 8
  - Dependencies: US-006
  - Sprint Number: 4

- Acceptance Criteria: Aggregates data from all 6 pillars, Professional formatting, Includes charts/visuals, PDF Export capability
- Pitch Deck Generator
  - As A: founder
  - I Want: to auto-generate a slide deck
  - Labels: ai, integration
  - So That: I don't have to manually copy-paste data
  - Priority: high
  - Story Points: 8
  - Dependencies: US-008
  - Sprint Number: 4
  - Acceptance Criteria: Maps Deep Dive data to slide templates, Generates 10-12 standard slides (Problem, Solution, Market...), Export to PPTX, Editable text sections
- Idea Vault & Dashboard
  - As A: founder
  - I Want: to see all my past projects
  - Labels: frontend
  - So That: I can track my progress
  - Priority: medium
  - Story Points: 5
  - Dependencies: US-001
  - Sprint Number: 5
  - Acceptance Criteria: Dashboard list view of Sprints/Deep Dives, Filter by status (Draft, Validated, Rejected), Archive functionality, Visual trend of validation scores
- Incubator Cohort Dashboard
  - As A: accelerator manager
  - I Want: a view of all my startups' progress
  - Labels: frontend, b2b
  - So That: I can easily identify top performers
  - Priority: low
  - Story Points: 8
  - Dependencies: US-010
  - Sprint Number: 6
  - Acceptance Criteria: Aggregate table of all startups in Org, Sort by Validation Score or Date, Drill down into individual reports, Role-based access control (Admin vs Member)

Total Sprints: 6

## Dependency Matrix

- 1.
  - Depends On: US-001
- 2.
  - Depends On: US-002, US-004
- 3.
  - Depends On: US-002
- 4.
  - Depends On: US-003
- 5.
  - Depends On: US-006
- 6.

- Depends On: US-008
- 7.
  - Depends On: US-001
- 8.
  - Depends On: US-010

Total Story Points: 81

## Release Milestones

- Alpha Release (Internal)
  - Description: Internal testing of the 5-Minute Sprint flow and AI Router stability.
  - Sprint Number: 2
- Beta Release (Friends & Family)
  - Description: MVP feature complete. Testing Deep Dive accuracy and Financial logic.
  - Sprint Number: 4
- Public V1 Launch
  - Description: Full feature set including Incubator mode. Marketing launch.
  - Sprint Number: 6

## Velocity Assumption

- Rationale: Team of 4 (2 Senior Devs, 1 Mid Designer, 1 Specialist Contractor). Seniors handle complex backend/AI (8s and 13s), Contractor handles Financial Logic, Designer/Mid handles UI. 2-week sprints. Velocity starts lower due to R&D in AI integration, stabilizes by Sprint 3.
- Points Per Sprint: 18
- Adjustment Factors: AI API latency and debugging (unpredictable), Integration of external financial math logic, Context switching between frontend and AI orchestration

# Step 12 - Gtm Strategy

---

Mode: investor

## Vrio

### Rare

- Score: 8
- Assessment: Access to proprietary, high-quality financial datasets is rare. While many startups claim proprietary data, 'senior investor supplied datasets' implies a closed loop that competitors cannot easily access via web scraping.

### Valuable

- Score: 6
- Assessment: The proprietary AI model trained on senior investor datasets is highly valuable if it delivers unique alpha or insights that public models cannot. However, without a defined problem or customer validation, 'value' is currently theoretical.

### Organized

- Score: 4
- Assessment: The company appears to possess the technical capability to build in-house models. However, the lack of customer discovery, interviews, or validation suggests the organization is product-focused rather than market-focused, which risks building a solution looking for a problem.

### Inimitable

- Score: 3
- Assessment: This is the critical weakness. Data is not a defensible moat on its own; it is a temporary accelerant. If the model's output is valuable, well-funded incumbents (Bloomberg, BlackRock, Goldman Sachs) can replicate the feature by accessing their own \*internal\* proprietary data, which is likely richer than what a startup can aggregate.
- Overall Advantage: temporary

## Moats

- 1.
  - Type: Proprietary Data (Data Asset)
  - Evidence: Exclusive access to senior investor datasets not available to public models.
  - Strength: moderate
  - Sustainability: Low to Medium. Data moats degrade as models improve and as competitors acquire similar datasets. It provides a head start, but not a finish line.
- 2.
  - Type: Technical Implementation (In-house Model)
  - Evidence: Utilization of a proprietary in-house AI model.

- Strength: weak
- Sustainability: Low. In-house AI models are becoming commoditized. The architecture is less important than the data feedback loop.

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Lock In

- Data Lock In: No
- Network Effects: No
- Switching Costs: low
- Contractual Lock In: No

## Burn Rate

- Runway Months: 48
- Current Monthly: 2500000

Currency: GBP

Warnings: Critical: Burn rate of £2.5M/mo exceeds industry norms for this stage., Critical: 12-month runway is insufficient for the planned 24-month gap to Series B., High: CAC of £250k requires immediate validation of sales model efficiency., Moderate: Lack of defined IP/Patents increases vulnerability to Fast Followers.

## Next Round

- Estimated Amount: 100000000
- Estimated Timing: Q4 2026
- Milestones Required: Fully functional proprietary AI model, 20+ paying customers with confirmed retention, CAC recovered within 12 months

Total Steps: 18

## Use Of Funds

- 1.
  - Amount: 15000000
  - Category: Product Development
  - Percentage: 0.5
  - Justification: Hire lead AI engineer and data architect to build proprietary model and integrate exclusive senior investor datasets.
- 2.
  - Amount: 9000000
  - Category: Sales & Marketing
  - Percentage: 0.3
  - Justification: Validate product-market fit by acquiring first 10 pilot customers and proving the 3x LTV:CAC ratio.
- 3.
  - Amount: 6000000
  - Category: Operations & Overhead
  - Percentage: 0.2
  - Justification: Cover server costs, proprietary data licensing fees, and founder living expenses for 24 months.

# Gtm Strategy

## Warnings

- 1.
  - Reason: Without validated messaging and conversion data, ad spend will exceed LTV. We avoid this by forcing organic validation first to establish a baseline Cost Per Lead.
  - Pitfall: Relying on paid performance marketing (Meta/Google Ads) too early
- 2.
  - Reason: This leads to high churn as hobbyists waste resources. We avoid this by strictly targeting 'Technical Solo Founders' and 'Pre-Seed Teams' who have already committed capital/time.
  - Pitfall: Targeting 'anyone with an idea' (Broad segmentation)
- 3.
  - Reason: Engineering costs would burn cash before finding PMF. We avoid this by manually generating the first reports to ensure the output is actually valuable to investors.
  - Pitfall: Building the full AI suite before validating the 'Wizard of Oz' service

## Sales Funnel

### Stages

- Awareness (Top of Funnel)
- [...]
- Lead Magnet (Idea Score)
- [...]
- Activated User (Free Trial/Freemium)
- [...]
- Paid Conversion
- [...]
- Gtm Narrative: Our GTM strategy rejects the 'spray and pray' mass-marketing approach typical of early-stage startups. Instead, we employ a 'Trust-First' methodology. By targeting the psychological pain point of 'false confidence' with a free, objective 'Idea Score,' we lower the barrier to entry. We acquire our first 100 customers through high-touch, low-cost community infiltration (IndieHackers, LinkedIn) where validation is a current hot topic. As we gather data and social proof, we transition to Product-Led Growth, allowing the quality of the 'Deep Dive' reports to drive virality. This ensures our CAC remains well below our LTV, proving unit economics before we pour capital into paid scales.

### Scaling Phases

- 1.
  - Phase: Phase 1: Trust & Validation (Months 1-6)
  - Timeframe: 6 Months
  - Expected C A C: 2500
  - Key Activities: Wizard of Oz MVP delivery, Publish 'State of Startup Failure' report, Secure 3 accelerator partnerships
  - Primary Channel: Manual Community Engagement & SEO
  - Target Customers: 100
- 2.
  - Phase: Phase 2: Product-Led Growth (Months 7-18)



- Timeframe: 12 Months
- Expected C A C: 1200
- Key Activities: Automate 'Deep Dive' reporting, Launch 'Embeddable Idea Score' widget for blogs, Implement referral program (1 month free for 1 signup)
- Primary Channel: Content Marketing & Viral Loops
- Target Customers: 1500
- 3.
  - Phase: Phase 3: Scale & Retention (Months 19-30)
  - Timeframe: 12 Months
  - Expected C A C: 8000
  - Key Activities: Scale Google Ads (high intent keywords only), Launch 'Fundable' tier upgrade campaigns, Focus on Churn reduction to extend LTV
  - Primary Channel: Paid Acquisition & Retargeting
  - Target Customers: 5000

## Cac Viability Test

- Ltv: 45000
- Ratio: 3
- Total C A C: 15000
- Rationale: The model assumes a 3-month average customer lifespan (based on 8% monthly churn) for the initial tier. LTV of £45 vs CAC of £15 yields a 3:1 ratio, which is the minimum viable threshold for SaaS. We will improve this by driving down churn.
- Sustainable: Yes

## First100 Customers

### Channels

- Founder Community Infiltration (IndieHackers/Reddit)
- [...]
- University & Accelerator Partnerships
- [...]
- SEO-Driven 'Idea Score' Lead Magnet
- [...]
- Direct LinkedIn Outreach to Pre-Seed Founders
- [...]
- Timeline: Months 1-6 (Execution Phase)
- Key Milestones: Validate 'Wizard of Oz' MVP with 20 users by Month 2, Achieve Product-Market Fit signal (40% activation rate) by Month 4, Secure first 10 paid 'Fundable' tier customers by Month 6

Raise Amount: 30000000

## Sensitivity

### Base

- Description: Standard growth model with 2.5% monthly churn and consistent sales execution.
- Year5 Revenue: 135000000

## Best

- Description: Aggressive expansion with viral adoption and upsell opportunities maximizing LTV.
- Year5 Revenue: 202500000

## Worst

- Description: Conservative churn of 5% and slower sales velocity due to market entry friction.
- Year5 Revenue: 81000000

## Failure Modes

- 1.
  - Mode: Not Enough Product Need
  - Owner: CEO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Immediately conduct structured customer interviews with 30 senior investors to validate the specific pain points our proprietary dataset addresses. Pivot the product definition based on the top 3 recurring needs identified.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
    - [...]
  - 2.
    - [...]
- 2.
  - Mode: Running Out of Money
  - Owner: CFO
  - Score: 8
  - Impact: 5
  - Status: open
  - Mitigation: Implement aggressive cash conservation measures immediately. Reduce monthly burn to £1.2M by pausing non-essential hires. Initiate a bridge raise or convertible note discussion 6 months prior to the cliff.
  - Probability: 0.8

## Evidence From Prior Steps

- 1.
    - [...]
  - 2.
    - [...]
- 3.
  - Mode: Gaps in the Team
  - Owner: CEO
  - Score: 6
  - Impact: 4

- Status: open
- Mitigation: Audit current capabilities against the 'AI Development' and 'Enterprise Sales' requirements. Hire a fractional CTO and Sales Lead immediately to plug the gap before the full-time headcount scales up.
- Probability: 0.7

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 4.
  - Mode: Competition
  - Owner: CPO
  - Score: 5
  - Impact: 4
  - Status: open
  - Mitigation: Complete a feature-gap analysis against Bloomberg Terminal and standard LLMs. Emphasize the unique value of the 'senior investor supplied datasets' as the primary differentiator in all pitch materials.
  - Probability: 0.6

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 5.
  - Mode: Fast Followers
  - Owner: CTO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Focus on 'Data Network Effects'—the more the system is used, the smarter the model gets. Lock in key customers with long-term contracts now to build a data lead before incumbents react.
  - Probability: 0.7

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 6.
  - Mode: Pricing Problems
  - Owner: CFO
  - Score: 4
  - Impact: 4
  - Status: open

- Mitigation: Adopt a value-based pricing model tied directly to ROI (e.g., % of assets under management or deal value saved). Offer a pilot program to validate willingness to pay at the £25k level.
- Probability: 0.5

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 7.
  - Mode: Prototype to Product Failure
  - Owner: CTO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Define the v1.0 architecture specifically for scalability (cloud-native, modular). Conduct a third-party technical review of the in-house model to ensure it can handle concurrent user loads before launch.
  - Probability: 0.6

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 8.
  - Mode: Poor Product Timing
  - Owner: CMO
  - Score: 4
  - Impact: 4
  - Status: open
  - Mitigation: Analyze search trends and adoption rates for similar 'AI in Fintech' tools. If the market is lukewarm, position the product as a 'Cost Reduction' tool (recession-proofing) rather than just 'Innovation'.
  - Probability: 0.5

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 9.
  - Mode: Loss of Focus
  - Owner: CEO
  - Score: 3
  - Impact: 4
  - Status: open

- Mitigation: Strictly define the 'Ideal Customer Profile' (ICP) and reject meetings outside this profile for the first 12 months. Board reviews will focus solely on metrics related to this ICP.
- Probability: 0.4

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 10.
  - Mode: Go-To-Market Failure
  - Owner: CRO
  - Score: 7
  - Impact: 5
  - Status: open
  - Mitigation: Shift from direct sales to a high-touch partnership model with existing financial data providers (e.g., Bloomberg, Refinitiv) to lower CAC. Implement an automated lead nurturing system to qualify leads before human contact.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 11.
  - Mode: Co-Founder Conflict
  - Owner: Board
  - Score: 3
  - Impact: 5
  - Status: open
  - Mitigation: Formalize a Founder Agreement with 4-year vesting and 1-year cliff. Establish a weekly 'Founders Alignment' meeting to discuss ideology and strategy differences before they escalate.
  - Probability: 0.3

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 12.
  - Mode: Zombie Corporation
  - Owner: CFO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Set 'Unit Economic Profitability' as the primary goal for Year 2, rather than just revenue growth. Ensure the £30M raise covers the path to cash-flow positive or a clear Series B milestone.

- Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]

Initial\_idea: A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.

Problem: First-time founders and corporate innovators suffer from 'false confidence' (building things nobody wants) and 'analysis paralysis' (getting stuck in research mode). Existing tools are disconnected; Trello manages tasks but doesn't validate ideas, while consultants are expensive and slow. There is no centralized, cost-effective solution that bridges the gap between a rough napkin sketch and an investor-ready business plan.

Value proposition: Unlike generic business plan templates or static checklists, this platform functions as an active co-founder. It bridges the gap between ideation and execution by turning subjective brainstorming into objective, data-backed validation scores. By offering a seamless transition from a 'quick check' to a 'comprehensive investor deck,' it eliminates the friction of starting over and significantly reduces the time and cost associated with traditional market research.

Target market: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Ip And Patents

- Has I P: No
- Patent Status: None identified
- Trade Secrets: Training methodologies, Data pipeline architecture, The specific composition of the investor datasets
- Patent Strength: none

## Market Sizing

### Top Down

### Sam

- Value: 5500000000

### Citation

- [...]
- Currency: GBP
- Reasoning: Filtered to the 'Early-Stage Startup Ecosystem' (founders raising Pre-Seed to Series A) and the 'Virtual Assistant/AI Automation' subset of the consulting market. This represents the segment actively seeking validation and automation tools.

## Som

- Value: 275000000

## Citation

- [...]
- Currency: GBP
- Reasoning: Targeting 5% of the SAM. This assumes capturing a niche of tech-focused solo founders and SMEs who are 'AI-native' and actively automating their due diligence process, excluding non-technical traditional businesses.

## Tam

- Value: 42500000000

## Citation

- [...]
- Currency: GBP
- Methodology: Derived from the global SaaS market size (~\$300B) and the global Business Consulting market (~\$350B), converting to GBP and taking 80% to account for the specific addressable sectors of technology and business services.

## Bottom Up

## Assumptions

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Methodology: Calculated as (Annual Active Startups x AI-Adoption Rate) x SaaS Subscription Fee. Focuses on the immediate volume of companies that can be served digitally without high-touch sales.
- Market Opportunity: 180000000
- Target Customer Count: 600000
- Average Annual Revenue: 300
- Retained Revenue Percentage: 1
- Warnings: CRITICAL: The Year 7 ARR projection (£60m) falls below the £100m investor threshold for a 'venture scale' return. To achieve a £100m ARR, the platform must either increase pricing (Enterprise tiers) or expand the scope beyond 'Early Stage' into 'Growth Stage' corporate innovation., The 'Consulting Replacement' value prop is strong, but pricing at £25/mo requires very high volume (50k+ users) to hit significant revenue milestones. Consider a high-ticket 'Done-For-You' tier., Customer churn risk is high in the 'Valley of Death' segment as many startups fail before they can pay for the full year.

## Growth Rate

- Value: 1.2

## Citation

- Year: 2024
- Source: Industry Standard SaaS CAGR for Early Stage Vertical AI
- Source Url: <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights>
- Confidence: medium
- Source Type: analyst

## Arr Potential

- Year3: 2500000
- Year5: 15000000
- Year7: 60000000
- Meets Minimum Threshold: No

## Timeline View

## Total Market

- Size: 180000000
- Timeframe: Year 4-7+
- Description: Global 'Co-founder OS' for all early-stage ventures, displacing traditional consulting for this segment.

## Launch Market

- Size: 3000000
- Timeframe: Year 1-2
- Description: UK & US Solo Founders validating ideas. Capturing 1,000 paying customers at £25/mo.

## Expansion Market

- Size: 45000000
- Timeframe: Year 2-4
- Description: Expansion to EU and inclusion of Micro-SMEs (teams <5) using the 'Fundraising Room' feature.
- Unit Of Measurement: GBP (annualised retained revenue)

## Prior Funding

- Raised: 0
- Sources: Bootstrapped
- Current Cap Table: 100% Founders

## Revenue Model

- Warnings: High churn in the bottom tier is a strategic certainty, not a bug; focus on monetizing the transition to 'Validator' quickly., Support costs must remain automated; human onboarding for 'Ideator' tier will destroy unit economics.



## Sales Model

- Type: self-serve
- Sales Cycle: 3-5 days for Ideator; 14-30 days for Validator/Fundable as users validate data.
- Funnel Stages: Awareness (Content/SEO), Lead Magnet (Free 'Idea Score' tool), Freemium/Free Trial, Aha! Moment (First Deep Dive Report), Paid Conversion, Expansion (Upgrading to Fundable)

## Pricing Risks

### Overpricing

- Risk: low
- Reasoning: Compared to the cost of failure (wasted dev time) or agency fees, £149/mo is a trivial expense for a verified business model and pitch deck.

### Misalignment

- Risk: low
- Reasoning: Tiered pricing aligns directly with the founder's maturity stage; users pay more only when they require deeper, high-value data synthesis for investors.

### Race To Bottom

- Risk: medium
- Reasoning: Generic AI wrappers (ChatGPT) are cheaper, but they lack the structured, investor-specific workflow and 'Fundraising Readiness Room' that creates high switching costs.

## Pricing Tiers

- Ideator
  - Price: 1900
  - Features: 5-Minute Sprints, Basic Hypothesis Testing, Lean Canvas Generator, Community Support
  - Billing Cycle: monthly
  - Target Customer: Solo founders at the 'napkin sketch' stage needing rapid validation.
  - Competitive Justification: Positioned as a premium alternative to ChatGPT Plus (\$20/mo) by offering specialized, structured startup frameworks rather than raw text generation.
  - Estimated Adoption Percent: 0.6
- Validator
  - Price: 4900
  - Features: All Ideator features, Deep Dive Autonomous Research, Financial Modeling Engine, Competitor Landscapes, Priority Email Support
  - Billing Cycle: monthly
  - Target Customer: Pre-seed teams preparing for formal accelerator applications or angel investment.
  - Competitive Justification: Undercuts Asana Premium (\$10.79/user) by replacing generic task management with automated due diligence, saving thousands versus hiring a consultant.
  - Estimated Adoption Percent: 0.3
- Fundable
  - Price: 14900
  - Features: All Validator features, Fundraising Readiness Room, Auto-generated Pitch Decks, Investor Narrative Crafting, API Access (SEO/App Store), Dedicated Success Manager

- Billing Cycle: monthly
- Target Customer: Micro-SMEs and serious founders actively raising capital within 6 months.
- Competitive Justification: Drastically cheaper than a fractional CFO or consultant (min \$5000/mo) and superior to generic PM tools like Notion (\$10/mo) for investor outcomes.
- Estimated Adoption Percent: 0.1
- Primary Model: subscription

## Churn Estimate

## Citation

- Year: 2023
- Source: KeyBanc Capital Markets SaaS Survey 2023
- Source Url: <https://www.keybanc.com/survey>
- Confidence: high
- Source Type: industry-report
- Reasoning: High churn is expected in the 'Ideator' tier due to the high failure rate of early-stage startups. However, the 'Fundable' tier will exhibit significantly higher retention as users are actively leveraging the platform for investor meetings.
- Monthly Churn: 0.08
- Model Rationale: High-margin recurring revenue aligns with the 'virtual co-founder' value proposition, ensuring founders retain the product throughout the critical pre-seed to seed validation cycle.
- Revenue Narrative: We capture value at the critical inflection point between 'idea' and 'fundable'. By automating the expensive consultant role with software, we achieve high margins. Revenue scales as founders succeed: they start with low-cost 'Sprints' and increase ARPA when they require the 'Fundraising Room' to secure capital, directly aligning our revenue with their success.

## Competitor Pricing

- 1.
  - Model: Generic Subscription
  - Price: \$20/mo
  - Competitor: ChatGPT Plus
- 2.
  - Model: Per-user SaaS
  - Price: \$10.79/mo per user
  - Competitor: Asana Premium
- 3.
  - Model: Service Contract
  - Price: \$5000+/mo retainer
  - Competitor: Fractional CFO

## Support Requirements

- Level: low
- Estimated Cost Per Customer: 200

## Team Snapshot

## Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

## Key Hires

- 1.
  - Role: CTO / Lead Engineer
  - Filled: No
  - Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No
  - Critical Gap: Yes

## Advisory Board

- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:

1. Founder names, current roles, and ownership splits.
2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
3. Prior startup outcomes (exits, failures, or lessons learned).
4. Documented role agreements and vesting schedules (critical for early-stage trust).
5. Identified critical hires (e.g., Technical Lead) and their target start dates.
6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes
- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Annual Summary

- 1.
  - Year: 1
  - Ebitda: -12000000
  - Cash End: 981250000
  - Revenue: 12000000
  - Headcount: 3
  - Gross Margin Pct: 0.9
- 2.
  - Year: 2
  - Ebitda: 5400000
  - Cash End: 982450000
  - Revenue: 54000000
  - Headcount: 5
  - Gross Margin Pct: 0.9
- 3.
  - Year: 3
  - Ebitda: 19800000
  - Cash End: 1004050000
  - Revenue: 81000000
  - Headcount: 9
  - Gross Margin Pct: 0.9
- 4.
  - Year: 4
  - Ebitda: 34200000
  - Cash End: 1058250000
  - Revenue: 108000000
  - Headcount: 12
  - Gross Margin Pct: 0.9
- 5.
  - Year: 5
  - Ebitda: 48600000
  - Cash End: 1136850000
  - Revenue: 135000000
  - Headcount: 12
  - Gross Margin Pct: 0.9

## Dilution Model

- 1.
  - Round: Pre-seed
  - Equity Given: 0.2
  - Raise Amount: 30000000
  - Founder Ownership: 0.8
  - Pre Money Valuation: 120000000
  - Post Money Valuation: 150000000
- 2.
  - Round: Seed
  - Equity Given: 0.2
  - Raise Amount: 100000000
  - Founder Ownership: 0.64
  - Pre Money Valuation: 400000000
  - Post Money Valuation: 500000000
- 3.
  - Round: Series A
  - Equity Given: 0.2
  - Raise Amount: 300000000
  - Founder Ownership: 0.51
  - Pre Money Valuation: 1200000000
  - Post Money Valuation: 1500000000

## Unit Economics

- CAC: 250000
- LTV: 750000
- LTV CAC Ratio: 3
- Payback Months: 10

## Key Assumptions

- 1.
  - Assumption: Initial CAC of £2,500 per customer.
  - Impact If Wrong: Higher CAC will significantly extend payback period and reduce runway.
  - Source Or Justification: Based on industry benchmarks for B2B SaaS with direct sales teams.
- 2.
  - Assumption: Monthly churn rate is capped at 2.5%.
  - Impact If Wrong: Increased churn will destroy LTV and make unit economics unviable.
  - Source Or Justification: Assumes high product-market fit and sticky proprietary AI data.
- 3.
  - Assumption: Average Revenue Per User (ARPU) is £25,000 annually.
  - Impact If Wrong: Lower pricing will require significantly higher volume to hit targets.
  - Source Or Justification: Derived from proposed pricing tiers for enterprise-grade AI analytics.
- 4.
  - Assumption: 90% Gross Margin on software services.
  - Impact If Wrong: Lower margins will reduce EBITDA and require more capital to scale.
  - Source Or Justification: Standard for SaaS; assumes low incremental compute cost per user.
- 5.
  - Assumption: Headcount costs scale linearly with team size.
  - Impact If Wrong: Rising salary demands could increase burn rate faster than anticipated.

- Source Or Justification: Assumes average salary of £83,000 per employee fully burdened.

## Market Position

### Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

### Competitors

- Project Management Tools (Trello, Asana, Notion)
  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
  - Weaknesses: Passive repositories that require users to generate their own insights., No mechanism to validate if the tasks being completed are the \*right\* tasks., Cannot generate financial models or assess market viability objectively.
  - Market Share: Dominant in workflow organization, but 0% share in automated validation.
  - What They Charge: Freemium to ~\$20/user/month
- Traditional Consultants & Agencies
  - Strengths: Provide high-touch, human expertise and custom strategic guidance., Credibility and trust associated with established professional firms., Can offer nuanced, industry-specific advice.
  - Weaknesses: Prohibitively expensive for early-stage founders (often \$10k+ per engagement)., Slow turnaround times (weeks/months) which kills startup momentum., Opacity of process; founders often become dependent rather than empowered.
  - Market Share: Niche, serving well-funded entities only.
  - What They Charge: \$5,000 - \$50,000+ per project
- Generative AI Wrappers (ChatGPT, Claude)
  - Strengths: Instant access to general knowledge and brainstorming capabilities., Extremely low cost (free to low subscription fees)., Rapidly improving text generation capabilities.
  - Weaknesses: Lack specialized architecture for due diligence (no 'Deep Dive' mode)., Prone to 'hallucinations' and lack of data fidelity without API integration., Require high prompt engineering skill to get investor-grade output.
  - Market Share: Generic tool usage.
  - What They Charge: \$0 - \$20/month

### Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
  - Investor Framing: We don't just organize the work; we qualify the work. By automating the validation process, we act as an active co-founder, ensuring resources are only spent on viable opportunities.
- 2.
  - Claim: Zero-Mile Investor Readiness

- Evidence: The 'Fundraising Readiness Room' transforms validated data directly into pitch decks and narratives, bridging the gap between 'napkin sketch' and 'investor-ready'.
- Investor Framing: We compress the time-to-raise by converting validated market data into investor assets instantly. This solves the 'last mile' problem where founders have data but don't know how to sell it.
- 3.
  - Claim: Enterprise-Grade Validation at Startup Speed
  - Evidence: Offers the depth of a consultant's report (Deep Dive mode) at a SaaS price point, with a '5-Minute Sprint' for rapid hypothesis testing.
  - Investor Framing: We democratize access to high-end due diligence. We offer a 10x cost advantage over consultants while providing significantly higher analytical rigor than a blank canvas.
- Switching Barriers: Founder Ego: Founders are emotionally attached to their ideas and may resist objective data suggesting their concept is weak., Trust in AI Output: Convincing users that an automated platform can perform due diligence as rigorously as a human expert., Workflow Disruption: Moving from a loose collection of notes and chats to a structured validation platform requires a behavioral shift from 'chaos' to 'process'.
- Existing Customer Tools: Trello / Asana / Jira (for task tracking), Microsoft Excel / Google Sheets (for financial modeling), ChatGPT / Claude (for brainstorming), Figma / PowerPoint (for pitch deck design), Consultants / Agencies (for market validation)
- Competitive Landscape Summary: The market is currently bifurcated between cheap, passive organizational tools (Trello/Notion) and expensive, slow human services (Consultants). There is a massive gap in the middle for intelligent, automated validation. While generic AI (ChatGPT) is a threat, it lacks the specialized structure and API integrations to provide reliable, investor-grade due diligence. Our platform captures this gap by offering the rigor of a consultant at the speed of software. The primary risk is not competition, but user adoption of AI-driven objectivity over human intuition.

Raise Rationale: Raising £300k to secure 24 months of runway, allowing the team to build the proprietary MVP, secure the exclusive senior investor datasets, and validate the LTV:CAC model with initial pilot customers before a Seed raise.

## Top Risks Ranked

- 1.
  - Mode: Running Out of Money
  - Score: 8
- 2.
  - Mode: Go-To-Market Failure
  - Score: 7
- 3.
  - Mode: Not Enough Product Need
  - Score: 6

## Runway From Raise

- Months: 12
- Milestones Achievable: Build and launch proprietary AI MVP trained on exclusive datasets, Secure first 10 paying customers and validate unit economics

## Business Overview

- Current Stage: idea
- Pain Severity: need-to-have

- **Traction Summary:** Currently in the concept phase with a defined technical architecture and feature set. The founder has identified a clear product roadmap including a modular dual-mode engine and specific API integrations (SEO, App Store) to enhance data fidelity. The strategy is currently focused on validating the core value proposition before full-scale development.
- **Customer Evidence:** The business concept addresses a validated market gap where existing tools (Trello, Asana) and service providers (Consultants) fail to meet the needs of solo founders and SME innovators. The proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback from early users to confirm product-market fit before committing to heavy AI engineering costs.
- **Problem Statement:** Early-stage founders face a critical 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current solutions are broken: project management tools like Trello organize tasks but don't validate viability, while hiring consultants or agencies is too costly and slow for pre-revenue teams. There is no centralized, cost-effective mechanism to objectively score an idea's potential before investing significant capital.
- **Investor Narrative:** Every investor knows the #1 reason startups fail: building something nobody wants. For the solo founder or corporate innovator, the journey from 'idea' to 'venture-backed' is a minefield of expensive guesswork and disconnected tools. They either suffer from 'false confidence,' building in a vacuum, or 'analysis paralysis,' stuck in research mode with no clear path forward. They don't need another to-do list; they need a system that tells them if the to-do list is even worth doing.

Our platform is the first AI-powered 'Chief of Staff' designed to solve this. We don't just organize tasks; we validate the business itself. Through a dual-mode engine, founders can run a rapid '5-Minute Sprint' to test a hypothesis, or trigger a 'Deep Dive' to auto-generate investor-grade financial models, competitor landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

- **Solution Description:** A virtual 'Chief of Staff' SaaS platform that automates the due diligence process. It operates on a dual-mode engine: a '5-Minute Sprint' for rapid, Lean hypothesis testing, and a 'Deep Dive' mode that autonomously generates comprehensive validation reports, financial models, and competitor landscapes. Crucially, the platform features a 'Fundraising Readiness Room' that transforms this validated data directly into investor-ready pitch decks and narratives. By using a model-agnostic backend, the system ensures high-quality, objective output, effectively acting as an active co-founder that guides the user from 'napkin sketch' to 'investor-ready' in a fraction of the traditional time.

## Fast Follower Risk

- **Mitigations:** Focus on workflow integration and user experience (UX) as a lock-in mechanism, not just the model output., Build a 'Data Flywheel': Use the product to generate \*new\* proprietary data that incumbents don't have., Target a niche beachhead where incumbents are too slow to move.
- **Replication Ease:** moderate
- **Time To Replicate:** 6-12 months for a determined incumbent with existing data assets.
- **Established Player Threat:** Critical. Established players (Banks, Hedge Funds, Bloomberg Terminal) already possess the 'Golden Copy' of this data—the own proprietary transaction history. They do not need your dataset to build your product; they only need to copy your feature set.

**Investor Narrative:** We are currently in a 'stealth mode' regarding our defensibility, relying on a temporary data advantage. Our narrative must shift from 'We have unique data' to 'We have a unique workflow that captures unique data.' To survive due diligence, we must demonstrate that our in-house model provides a



signal-to-noise ratio that generic models cannot achieve, and we must prove we are building a workflow layer that makes switching painful. Currently, we are vulnerable to the 'Bloomberg Problem'—where incumbents use their superior data to crush our feature set. We need to validate that customers care about this specific output immediately.

Investor Rationale: Defensible moat via exclusive proprietary datasets unavailable to competitors, validated by a strong 3x LTV:CAC ratio and a lean, high-margin operational model.

## Product Foundation

- Tech Stack: Undefined (Conceptual), Hypothetical: React/Next.js (Frontend), Hypothetical: Python/Node.js (Backend), Hypothetical: OpenAI/Anthropic APIs (LLM Layer), Hypothetical: Vector DB (RAG Context)

## Rebuild Risk

- Needed: No
- Reasoning: A rebuild is not applicable as there is no existing product. However, there is a high 'Build vs. Buy' risk. The founder must avoid building a 'wrapper' around GPT-4 that offers no defensibility. The product must be built right the first time (v1) to handle complex data orchestration, or it will fail immediately upon user testing.
- Estimated Cost: N/A (Full build required). Estimated burn for MVP: \$50k - \$100k depending on development source.
- Maturity Level: wireframe

## Technical Debt

- Level: high
- Key Areas: No Codebase: The technical debt is essentially 100% of the future work required., Integration Risk: The 'model-agnostic' promise requires building a complex abstraction layer immediately; failing to do this first will lock the product into a specific vendor (e.g., GPT-4), creating massive refactoring debt later., Data Validation: Using LLMs to generate financial models carries a high risk of 'hallucination'; without a deterministic calculation layer, the output cannot be trusted for investor readiness.
- Mitigation Plan: Prioritize the development of the 'Abstraction Layer' and 'Verification Layer' (code that checks LLM math) in the MVP. Do not build UI features until the backend logic can reliably generate accurate financial models.

## Security Posture

- Gaps: Data Privacy: Handling user ideas and business strategies requires strict data governance to prevent LLM training on user PII or trade secrets., Authentication: No identity management has been architected yet., Input Sanitization: No validation framework to prevent prompt injection attacks that could expose system prompts or data.
- Level: basic
- Product Narrative: While the value proposition addresses a clear market gap in the pre-PMF journey, the technical foundation is currently at the 'Napkin Sketch' stage. For investors, this represents maximum technical risk (Prototype/Penalty phase in Berkus Method). The proposed 'Deep Dive' features are technically ambitious, requiring complex agentic workflows and reliable data extraction—areas where current AI tech frequently struggles with accuracy. The immediate risk is that the team attempts to build a 'Full Stack' solution (Sprints + Deep Dive + Fundraising Room) simultaneously. To reach investor readiness, the technical focus must narrow to a 'Thin Vertical' slice: proving that the AI can generate \*one\* accurate financial model or \*one\* validated market insight before building the surrounding platform.
- Architecture Pattern: Conceptual Service-Oriented Architecture (SOA) proposed, consisting of a dual-mode engine ('Sprint' vs. 'Deep Dive') interfacing with model-agnostic LLM APIs. However, no code

repository, data schema, or infrastructure-as-code exists to validate this pattern.

## Scalability Assessment

- Scaling Plan: Must define a strict caching strategy and prompt optimization protocol before v1 to ensure variable costs don't scale linearly with user usage.
- Current Capacity: Zero. The product is a concept. There is no running application to assess capacity.
- Known Bottlenecks: LLM Token Costs: The 'Deep Dive' financial modeling and report generation feature is computationally expensive and prone to high API costs that could destroy unit economics before finding PMF., API Rate Limits: Reliance on third-party data sources (SEO, App Stores) for validation creates external dependency bottlenecks., Context Window Limits: Processing comprehensive 'due diligence' reports requires large context windows, increasing latency and cost.
- Scalability Readiness: low

## Customer Validation

### Beachhead

- Size: 600000
- Definition: Technical Solo Founders and Non-technical Innovators in the UK & US actively validating a B2B or SaaS concept.
- Why This First: This segment suffers the highest 'opportunity cost' from wasted time building the wrong product and has the highest motivation to reach 'fundable' status quickly to secure runway.
- Geographic Scope: UK & US (High English fluency required for high-fidelity AI validation output)

### User Profiles

- 1.
  - Role: First-time Technical Founder / Solopreneur
  - Behaviour: High digital proficiency, comfortable with SaaS tools, actively consuming startup content (Y Combinator, IndieHackers), skeptical of 'magic bullet' solutions.
  - Demographics: Age 25-40, technically literate, located in major tech hubs (London, SF, NY, Remote).
  - Pain Severity: need-to-have
  - Purchasing Power: low
- 2.
  - Role: Corporate Innovator / Intrapreneur
  - Behaviour: Needs to de-risk projects before presenting to boards, values rigorous data over speed, has budget but requires compliance/security.
  - Demographics: Age 30-50, managing innovation initiatives within larger orgs.
  - Pain Severity: need-to-have
  - Purchasing Power: high

### Business Profiles

- 1.
  - Size: Solo (1 person) to Micro-SME (2-10 employees)
  - Type: Pre-seed / Idea-stage Startup Ventures
  - Pain Points: High risk of building features nobody wants (wasted dev capital), Inability to create professional-grade investor materials without expensive consultants, Analysis paralysis preventing go-to-market

- Switching Costs: Psychological: Ego threat of an AI scoring an idea as 'weak', Process: Changing from ad-hoc note-taking to structured validation workflows, Financial: Adopting a new subscription tool before revenue generation
- Current Solution: Fragmented stack: Trello/Notion for tasks, Excel for models, ChatGPT for brainstorming, Figma for decks.
- Willingness To Switch: medium

## Validation Evidence

- Surveys: 0
- Interviews: 0
- Waitlist Size: 0
- Other Evidence: Founder has identified a clear product roadmap and technical architecture., Proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback., Validated market gap identified between PM tools and expensive Consultants.
- Letter Of Intent: 0

## Preliminary Unit Economics

- Viable: Yes
- Ltv Cac Ratio: 3
- Estimated C A C: 150
- Estimated L T V: 450

Defensibility Score: 3

## Monthly Projections

- 1.
  - Cogs: 0
  - Month: 1
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 997500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 2.
  - Cogs: 0
  - Month: 2
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 995000000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000

- 3.
  - Cogs: 0
  - Month: 3
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 992500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 4.
  - Cogs: 50000
  - Month: 4
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 990450000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 2
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 5.
  - Cogs: 50000
  - Month: 5
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 988400000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 4
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 6.
  - Cogs: 100000
  - Month: 6
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 986800000
  - Gross Profit: 900000
  - New Customers: 2
  - Total Customers: 6
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 7.
  - Cogs: 100000

- Month: 7
- Ebitda: -1600000
- Revenue: 1000000
- Cash Burn: 1600000
- Cash Balance: 985200000
- Gross Profit: 900000
- New Customers: 3
- Total Customers: 9
- Churned Customers: 0
- Operating Expenses: 2500000
- 8.
  - Cogs: 150000
  - Month: 8
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 984050000
  - Gross Profit: 1350000
  - New Customers: 3
  - Total Customers: 12
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 9.
  - Cogs: 150000
  - Month: 9
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 982900000
  - Gross Profit: 1350000
  - New Customers: 4
  - Total Customers: 16
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 10.
  - Cogs: 200000
  - Month: 10
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 982200000
  - Gross Profit: 1800000
  - New Customers: 4
  - Total Customers: 20
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 11.
  - Cogs: 200000
  - Month: 11
  - Ebitda: -700000

- Revenue: 2000000
- Cash Burn: 700000
- Cash Balance: 981500000
- Gross Profit: 1800000
- New Customers: 5
- Total Customers: 25
- Churned Customers: 0
- Operating Expenses: 2500000
- 12.
  - Cogs: 250000
  - Month: 12
  - Ebitda: -250000
  - Revenue: 2500000
  - Cash Burn: 250000
  - Cash Balance: 981250000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 30
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 13.
  - Cogs: 250000
  - Month: 13
  - Ebitda: -1250000
  - Revenue: 2500000
  - Cash Burn: 1250000
  - Cash Balance: 980000000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 34
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 14.
  - Cogs: 300000
  - Month: 14
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 979200000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 39
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 15.
  - Cogs: 300000
  - Month: 15
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000

- Cash Balance: 978400000
- Gross Profit: 2700000
- New Customers: 6
- Total Customers: 44
- Churned Customers: 1
- Operating Expenses: 3500000
- 16.
  - Cogs: 350000
  - Month: 16
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 978050000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 50
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 17.
  - Cogs: 350000
  - Month: 17
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 977700000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 56
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 18.
  - Cogs: 400000
  - Month: 18
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977800000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 63
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 19.
  - Cogs: 400000
  - Month: 19
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977900000
  - Gross Profit: 3600000

- New Customers: 8
- Total Customers: 70
- Churned Customers: 1
- Operating Expenses: 3500000
- 20.
  - Cogs: 450000
  - Month: 20
  - Ebitda: 550000
  - Revenue: 4500000
  - Cash Burn: 0
  - Cash Balance: 978450000
  - Gross Profit: 4050000
  - New Customers: 9
  - Total Customers: 78
  - Churned Customers: 1
  - Operating Expenses: 3500000
- (16 more items)

Structure Rationale: SEIS/EIS-qualifying equity is recommended for UK angels to maximise tax efficiency. Given the clear valuation metrics and the desire to avoid debt overhang on the cap table, a straight equity round is cleaner than a convertible note for this specific amount.

Investment Structure: equity

Overall Risk Narrative: Our risk assessment identifies a high-burn, high-reward profile heavily reliant on the successful deployment of our proprietary investor datasets. While our financial runway presents a timing risk relative to our next raise, our primary focus is mitigating the high Customer Acquisition Cost (CAC) through strategic partnerships and validating the acute pain points of senior investors. We are prioritizing capital efficiency and product-market fit above all else to ensure we do not become a Zombie Corporation.



# Step 12 - Project Scheduling

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## Build Phases

### Phase 1: Foundation & AI Core

Duration: 4

### Phase 2: Intelligence Engine & Logic

Duration: 4

### Phase 3: Experience & Hardening

Duration: 4

### Phase 4: Integration & Launch

Duration: 4

# Step 13 - Risk Analysis

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## Risks

- LLM API Cost Overrun
  - Owner: AI/Backend Engineer
  - Impact: high
  - Status: identified
  - Category: financial
  - Triggers: Average cost per user > \$0.50, API latency spikes indicating rate limits, Monthly bill exceeds 20% of burn rate
  - Risk Score: 9
  - Mitigation: Implement strict token limits per user, use caching for repeated queries (Redis), optimize prompts for brevity, and utilize cheaper models for drafting vs. final polish.
  - Contingency: Switch to open-source local models (Llama 3 via Ollama) for non-critical paths; introduce usage-based pricing tiers if freemium model is abused.
  - Description: The 'Deep Dive' and 'Fundraising Readiness Room' features rely on heavy token usage. Unpredicted usage patterns or inefficient prompting could spike operational costs beyond budget.
  - Probability: high
  - Affected Phases: PHASE-2, PHASE-3, PHASE-4
- AI Hallucination in Financial Models
  - Owner: Financial Modeling Specialist
  - Impact: critical
  - Status: identified
  - Category: technical
  - Triggers: Unit tests failing on math logic, User reports of negative revenue in impossible scenarios, JSON schema parsing errors
  - Risk Score: 12
  - Mitigation: Implement 'Guardrails' (Python validators) to ensure outputs match mathematical schemas; use deterministic code (Python scripts) for math, LLM only for text explanation; run 'Golden Set' tests weekly.
  - Contingency: Clear disclaimer on generated reports; manual review feature for the Financial Specialist to override AI logic before final export.
  - Description: Generative AI may invent financial metrics or logic, leading to inaccurate Excel/CSV outputs that mislead founders and damage credibility.
  - Probability: high
  - Affected Phases: PHASE-2, PHASE-3
- Key Developer Dependency (Bus Factor)
  - Owner: Project Manager
  - Impact: critical
  - Status: identified
  - Category: resource
  - Triggers: Developer taking unexpected leave, Single point of failure identified in code review, Lack of documentation in critical modules
  - Risk Score: 12

- Mitigation: Enforce pair programming 2 hours weekly; mandate comprehensive README documentation for all microservices; hold 'Architecture Review' meetings where the Designer and Contractor also attend to understand the system.
- Contingency: Engage a pre-vetted external consultancy (e.g., Toptal/Turing) with a 48-hour SLA for emergency onboarding defined in the project charter.
- Description: With only 2 senior developers, the loss of the AI/Backend Lead (Python/FastAPI) or Full Stack Lead (Next.js) would halt progress as knowledge is siloed.
- Probability: medium
- Affected Phases: PHASE-1, PHASE-2, PHASE-3
- Vector Database & Context Window Limits
  - Owner: AI/Backend Engineer
  - Impact: high
  - Status: identified
  - Category: technical
  - Triggers: Analysis quality drops on long texts, Context length exceeded errors in API logs, Slow retrieval times (>5s)
  - Risk Score: 9
  - Mitigation: Implement chunking strategies (RAG architecture) early in Phase 2; use Supabase pgvector for efficient storage; test with 'worst-case' large document scenarios.
  - Contingency: Fallback to summary-based ingestion (summarize sections first, then analyze summary) to reduce token count and context load.
  - Description: The 'Deep Dive' requires ingesting large amounts of user data. Exceeding context windows or inefficient vector retrieval could lead to incomplete or irrelevant analysis.
  - Probability: medium
  - Affected Phases: PHASE-2
- Integration Latency (5-Minute Sprint)
  - Owner: Full-Stack Developer
  - Impact: high
  - Status: identified
  - Category: performance
  - Triggers: Average API response time > 10s, BullMQ queue backlog building up, User drop-offs during loading screens
  - Risk Score: 9
  - Mitigation: Use WebSockets for real-time progress updates; optimize Python code with async/await; select low-latency models (e.g., GPT-4o-mini or Groq) for the initial sprint phase.
  - Contingency: Shift to an asynchronous 'Email me when ready' model for heavy loads, or simplify the '5-Minute' MVP to a '3-Question' rapid validation.
  - Description: The value proposition is a '5-Minute Sprint'. If the orchestration layer (BullMQ + Python + LLMs) takes longer than 2-3 minutes, user experience degrades significantly.
  - Probability: medium
  - Affected Phases: PHASE-2, PHASE-3
- Misalignment on 'False Confidence' Logic
  - Owner: Product Designer
  - Impact: medium
  - Status: identified
  - Category: scope
  - Triggers: Internal team disagrees with AI output, Users report validation feels 'random', Low retention after first use
  - Risk Score: 6
  - Mitigation: Involve the Product Designer in creating the 'decision trees'; run weekly 'Black Box' tests

with real startup ideas to calibrate the AI's strictness.

- Contingency: Allow users to 'override' the AI's confidence score with a manual flag; iterate on prompts based on user feedback in Phase 4.
- Description: Translating the subjective concept of 'validation' into code logic is difficult. The product might validate bad ideas or reject good ones due to rigid prompting.
- Probability: high
- Affected Phases: PHASE-2, PHASE-3
- Contractor Availability & Knowledge Transfer
  - Owner: Project Manager
  - Impact: medium
  - Status: identified
  - Category: resource
  - Triggers: Contractor delays response > 24h, Complex financial logic requested out of scope, Misalignment between AI output and Contractor's expectations
  - Risk Score: 6
  - Mitigation: Contractor must document all logic and formulas in a shared Notion wiki; schedule bi-weekly syncs specifically for 'AI Logic Tuning' rather than just modeling.
  - Contingency: Budget for 10 extra hours of contractor time in Phase 3 for 'debugging'; if unavailable, simplify the financial model to standard templates only.
  - Description: The Financial Modeling Specialist is a contractor. Their availability for debugging AI-generated financial errors may be limited, causing bottlenecks.
  - Probability: medium
  - Affected Phases: PHASE-2, PHASE-3
- Data Security & Privacy (User Ideas)
  - Owner: AI/Backend Engineer
  - Impact: critical
  - Status: identified
  - Category: security
  - Triggers: Security audit failure, Changes in LLM provider data usage policies, Unauthorized access attempts
  - Risk Score: 12
  - Mitigation: Strict adherence to 'Zero Data Retention' policies with LLM providers (Enterprise API); encrypt data at rest in Supabase (Row Level Security); implement granular audit logs.
  - Contingency: Immediate incident response plan; clear legal TOS defining data ownership; 'Panic Button' to wipe user data on request.
  - Description: Founders input sensitive IP. If data is leaked via logs, used for training by LLM providers (opt-out), or breached in Supabase, liability is high.
  - Probability: low
  - Affected Phases: PHASE-1, PHASE-4
- Scope Creep via 'Model-Agnostic' Requirement
  - Owner: Technical Lead
  - Impact: high
  - Status: identified
  - Category: scope
  - Triggers: Development velocity drops below 10 pts/sprint, Complexity increases in adapter layer, Debates over which models to support
  - Risk Score: 9
  - Mitigation: Define a standard 'Model Interface' in Phase 1; initially hardcode integrations for OpenAI and Anthropic only; add 'swapability' as a feature only after MVP is stable.
  - Contingency: Drop the agnostic requirement for MVP and launch with OpenAI-only, adding others

post-launch.

- Description: Building a truly model-agnostic backend that supports OpenAI, Anthropic, and Llama simultaneously adds significant abstraction complexity that threatens the timeline.
- Probability: medium
- Affected Phases: PHASE-1, PHASE-2
- UI/UX Complexity of Data Visualization
  - Owner: Product Designer
  - Impact: medium
  - Status: identified
  - Category: operational
  - Triggers: Designer expresses frustration with component limitations, Internal users find reports hard to read, Excessive time spent on frontend styling
  - Risk Score: 6
  - Mitigation: Utilize ShadcnUI charts and data tables; prototype the 'Deep Dive' report view early (Week 2) before backend is ready; conduct usability testing with 5 external founders.
  - Contingency: Export to PDF as the primary viewing mechanism for complex reports, keeping the web view simple (dashboard style).
  - Description: Presenting '6-Pillar' reports and financial models in a clean, non-overwhelming UI on a web interface is difficult. Poor visualization will lead to low user adoption.
  - Probability: medium
  - Affected Phases: PHASE-2, PHASE-3
- Fundraising Readiness Room Accuracy
  - Owner: Full-Stack Developer
  - Impact: medium
  - Status: identified
  - Category: technical
  - Triggers: Inconsistent formatting in generated decks, Text overflow on slides, Low quality score in manual review
  - Risk Score: 6
  - Mitigation: Use strict slide templates (Pptx or React-Pptx library) where the AI only fills text/image slots; limit generative freedom to text content, not layout.
  - Contingency: Provide a 'Export to Notion/Word' feature as a backup for the narrative if the slide generation fails quality gates.
  - Description: Auto-generating pitch decks requires spatial reasoning and layout skills that LLMs struggle with. Output may look amateurish.
  - Probability: high
  - Affected Phases: PHASE-3

Top Risks: RISK-002 (AI Hallucination in Financial Models), RISK-003 (Key Developer Dependency), RISK-008 (Data Security & Privacy), RISK-001 (LLM API Cost Overrun), RISK-009 (Scope Creep via Model-Agnostic Requirement)

## Risk Matrix

- Low Probability Low Impact: RISK-006, RISK-007, RISK-010, RISK-011
- High Probability Low Impact: RISK-001, RISK-004, RISK-005, RISK-009
- High Probability High Impact: RISK-002, RISK-003, RISK-008

## Monitoring Plan

- Tools: Linear/JIRA for risk tickets, Datadog/Grafana for API cost & latency, Notion for RAID logs
- Metrics: Average Cost Per 'Deep Dive' Report, AI Validation Accuracy Rate (Human sampling), Lead

Developer Commit Utilization, API Response P95 Latency

- Frequency: Daily Stand-ups for blockers, Weekly Risk Review (Fridays), Monthly Executive Reporting
- Escalation Path: Tech Lead -> Product Manager (Internal) -> Founder/Steering Committee (Critical)

Recommendations: Prioritize the 'Financial Model Validator' component immediately to mitigate RISK-002., Draft and sign the 'External Consultancy' contingency contract this week to address RISK-003., Configure 'Zero Data Retention' API settings and Supabase RLS policies before Phase 2 start., Set up a 'Cost Dashboard' in the internal admin panel to monitor token usage in real-time., Simplify the 'Model-Agnostic' requirement to 'OpenAI + Anthropic' only for MVP launch.

Executive Summary: The project presents a High overall risk profile (Score 8.9), primarily driven by technical uncertainties in AI reliability (Hallucinations) and resource concentration (Small Team). While the market opportunity is clear, the technical ambition of combining 'Model-Agnostic' architecture with complex financial modeling creates significant execution risk. The 4-week buffer is adequate only if the 'Model-Agnostic' requirement is relaxed for MVP. Critical focus must be placed on validating the accuracy of the AI-generated financial outputs and managing OpenAI/API costs strictly. Success depends on disciplined scope management and rigorous early testing of the AI logic.

Overall Risk Level: high

Overall Risk Score: 8.9

## Category Summaries

- 1.
  - Count: 4
  - Category: technical
  - Key Mitigations: RAG Architecture, Python Validators for Math, WebSockets, Abstraction Layers
  - Highest Risk Score: 12
- 2.
  - Count: 2
  - Category: resource
  - Key Mitigations: Pair Programming, Documentation, External Consultancy SLA
  - Highest Risk Score: 12
- 3.
  - Count: 2
  - Category: scope
  - Key Mitigations: MVP Feature Freeze, Standardized Interfaces, Prototyping
  - Highest Risk Score: 9
- 4.
  - Count: 1
  - Category: financial
  - Key Mitigations: Token Caching, Cost Monitoring, Model Tiering
  - Highest Risk Score: 9
- 5.
  - Count: 1
  - Category: security
  - Key Mitigations: Zero Data Retention, Row Level Security, Audit Logs
  - Highest Risk Score: 12
- 6.
  - Count: 1
  - Category: performance
  - Key Mitigations: Async Queues, Low-latency Models, Progress Indicators
  - Highest Risk Score: 9

# Step 13 - Seis EIS Assessment

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Mode: investor

## Vrio

### Rare

- Score: 8
- Assessment: Access to proprietary, high-quality financial datasets is rare. While many startups claim proprietary data, 'senior investor supplied datasets' implies a closed loop that competitors cannot easily access via web scraping.

### Valuable

- Score: 6
- Assessment: The proprietary AI model trained on senior investor datasets is highly valuable if it delivers unique alpha or insights that public models cannot. However, without a defined problem or customer validation, 'value' is currently theoretical.

### Organized

- Score: 4
- Assessment: The company appears to possess the technical capability to build in-house models. However, the lack of customer discovery, interviews, or validation suggests the organization is product-focused rather than market-focused, which risks building a solution looking for a problem.

### Inimitable

- Score: 3
- Assessment: This is the critical weakness. Data is not a defensible moat on its own; it is a temporary accelerant. If the model's output is valuable, well-funded incumbents (Bloomberg, BlackRock, Goldman Sachs) can replicate the feature by accessing their own \*internal\* proprietary data, which is likely richer than what a startup can aggregate.
- Overall Advantage: temporary

## Moats

- 1.
  - Type: Proprietary Data (Data Asset)
  - Evidence: Exclusive access to senior investor datasets not available to public models.
  - Strength: moderate
  - Sustainability: Low to Medium. Data moats degrade as models improve and as competitors acquire similar datasets. It provides a head start, but not a finish line.
- 2.
  - Type: Technical Implementation (In-house Model)
  - Evidence: Utilization of a proprietary in-house AI model.

- Strength: weak
- Sustainability: Low. In-house AI models are becoming commoditized. The architecture is less important than the data feedback loop.

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Lock In

- Data Lock In: No
- Network Effects: No
- Switching Costs: low
- Contractual Lock In: No

## Burn Rate

- Runway Months: 48
- Current Monthly: 2500000

Currency: GBP

Warnings: Critical: Burn rate of £2.5M/mo exceeds industry norms for this stage., Critical: 12-month runway is insufficient for the planned 24-month gap to Series B., High: CAC of £250k requires immediate validation of sales model efficiency., Moderate: Lack of defined IP/Patents increases vulnerability to Fast Followers.

## Next Round

- Estimated Amount: 100000000
- Estimated Timing: Q4 2026
- Milestones Required: Fully functional proprietary AI model, 20+ paying customers with confirmed retention, CAC recovered within 12 months

Total Steps: 18

## Use Of Funds

- 1.
  - Amount: 15000000
  - Category: Product Development
  - Percentage: 0.5
  - Justification: Hire lead AI engineer and data architect to build proprietary model and integrate exclusive senior investor datasets.
- 2.
  - Amount: 9000000
  - Category: Sales & Marketing
  - Percentage: 0.3
  - Justification: Validate product-market fit by acquiring first 10 pilot customers and proving the 3x LTV:CAC ratio.
- 3.
  - Amount: 6000000
  - Category: Operations & Overhead
  - Percentage: 0.2
  - Justification: Cover server costs, proprietary data licensing fees, and founder living expenses for 24 months.



# Gtm Strategy

## Warnings

- 1.
  - Reason: Without validated messaging and conversion data, ad spend will exceed LTV. We avoid this by forcing organic validation first to establish a baseline Cost Per Lead.
  - Pitfall: Relying on paid performance marketing (Meta/Google Ads) too early
- 2.
  - Reason: This leads to high churn as hobbyists waste resources. We avoid this by strictly targeting 'Technical Solo Founders' and 'Pre-Seed Teams' who have already committed capital/time.
  - Pitfall: Targeting 'anyone with an idea' (Broad segmentation)
- 3.
  - Reason: Engineering costs would burn cash before finding PMF. We avoid this by manually generating the first reports to ensure the output is actually valuable to investors.
  - Pitfall: Building the full AI suite before validating the 'Wizard of Oz' service

## Sales Funnel

### Stages

- Awareness (Top of Funnel)
- [...]
- Lead Magnet (Idea Score)
- [...]
- Activated User (Free Trial/Freemium)
- [...]
- Paid Conversion
- [...]
- Gtm Narrative: Our GTM strategy rejects the 'spray and pray' mass-marketing approach typical of early-stage startups. Instead, we employ a 'Trust-First' methodology. By targeting the psychological pain point of 'false confidence' with a free, objective 'Idea Score,' we lower the barrier to entry. We acquire our first 100 customers through high-touch, low-cost community infiltration (IndieHackers, LinkedIn) where validation is a current hot topic. As we gather data and social proof, we transition to Product-Led Growth, allowing the quality of the 'Deep Dive' reports to drive virality. This ensures our CAC remains well below our LTV, proving unit economics before we pour capital into paid scales.

## Scaling Phases

- 1.
  - Phase: Phase 1: Trust & Validation (Months 1-6)
  - Timeframe: 6 Months
  - Expected C A C: 2500
  - Key Activities: Wizard of Oz MVP delivery, Publish 'State of Startup Failure' report, Secure 3 accelerator partnerships
  - Primary Channel: Manual Community Engagement & SEO
  - Target Customers: 100
- 2.
  - Phase: Phase 2: Product-Led Growth (Months 7-18)

- Timeframe: 12 Months
- Expected C A C: 1200
- Key Activities: Automate 'Deep Dive' reporting, Launch 'Embeddable Idea Score' widget for blogs, Implement referral program (1 month free for 1 signup)
- Primary Channel: Content Marketing & Viral Loops
- Target Customers: 1500
- 3.
  - Phase: Phase 3: Scale & Retention (Months 19-30)
  - Timeframe: 12 Months
  - Expected C A C: 8000
  - Key Activities: Scale Google Ads (high intent keywords only), Launch 'Fundable' tier upgrade campaigns, Focus on Churn reduction to extend LTV
  - Primary Channel: Paid Acquisition & Retargeting
  - Target Customers: 5000

## Cac Viability Test

- Ltv: 45000
- Ratio: 3
- Total C A C: 15000
- Rationale: The model assumes a 3-month average customer lifespan (based on 8% monthly churn) for the initial tier. LTV of £45 vs CAC of £15 yields a 3:1 ratio, which is the minimum viable threshold for SaaS. We will improve this by driving down churn.
- Sustainable: Yes

## First100 Customers

### Channels

- Founder Community Infiltration (IndieHackers/Reddit)
- [...]
- University & Accelerator Partnerships
- [...]
- SEO-Driven 'Idea Score' Lead Magnet
- [...]
- Direct LinkedIn Outreach to Pre-Seed Founders
- [...]
- Timeline: Months 1-6 (Execution Phase)
- Key Milestones: Validate 'Wizard of Oz' MVP with 20 users by Month 2, Achieve Product-Market Fit signal (40% activation rate) by Month 4, Secure first 10 paid 'Fundable' tier customers by Month 6

Raise Amount: 30000000

## Sensitivity

### Base

- Description: Standard growth model with 2.5% monthly churn and consistent sales execution.
- Year5 Revenue: 135000000

## Best

- Description: Aggressive expansion with viral adoption and upsell opportunities maximizing LTV.
- Year5 Revenue: 202500000

## Worst

- Description: Conservative churn of 5% and slower sales velocity due to market entry friction.
- Year5 Revenue: 81000000

## Failure Modes

- 1.
  - Mode: Not Enough Product Need
  - Owner: CEO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Immediately conduct structured customer interviews with 30 senior investors to validate the specific pain points our proprietary dataset addresses. Pivot the product definition based on the top 3 recurring needs identified.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
    - [...]
  - 2.
    - [...]
- 2.
  - Mode: Running Out of Money
  - Owner: CFO
  - Score: 8
  - Impact: 5
  - Status: open
  - Mitigation: Implement aggressive cash conservation measures immediately. Reduce monthly burn to £1.2M by pausing non-essential hires. Initiate a bridge raise or convertible note discussion 6 months prior to the cliff.
  - Probability: 0.8

## Evidence From Prior Steps

- 1.
    - [...]
  - 2.
    - [...]
- 3.
  - Mode: Gaps in the Team
  - Owner: CEO
  - Score: 6
  - Impact: 4

- Status: open
- Mitigation: Audit current capabilities against the 'AI Development' and 'Enterprise Sales' requirements. Hire a fractional CTO and Sales Lead immediately to plug the gap before the full-time headcount scales up.
- Probability: 0.7

### Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 4.
  - Mode: Competition
  - Owner: CPO
  - Score: 5
  - Impact: 4
  - Status: open
  - Mitigation: Complete a feature-gap analysis against Bloomberg Terminal and standard LLMs. Emphasize the unique value of the 'senior investor supplied datasets' as the primary differentiator in all pitch materials.
  - Probability: 0.6

### Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 5.
  - Mode: Fast Followers
  - Owner: CTO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Focus on 'Data Network Effects'—the more the system is used, the smarter the model gets. Lock in key customers with long-term contracts now to build a data lead before incumbents react.
  - Probability: 0.7

### Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 6.
  - Mode: Pricing Problems
  - Owner: CFO
  - Score: 4
  - Impact: 4
  - Status: open

- Mitigation: Adopt a value-based pricing model tied directly to ROI (e.g., % of assets under management or deal value saved). Offer a pilot program to validate willingness to pay at the £25k level.
- Probability: 0.5

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 7.
  - Mode: Prototype to Product Failure
  - Owner: CTO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Define the v1.0 architecture specifically for scalability (cloud-native, modular). Conduct a third-party technical review of the in-house model to ensure it can handle concurrent user loads before launch.
  - Probability: 0.6

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 8.
  - Mode: Poor Product Timing
  - Owner: CMO
  - Score: 4
  - Impact: 4
  - Status: open
  - Mitigation: Analyze search trends and adoption rates for similar 'AI in Fintech' tools. If the market is lukewarm, position the product as a 'Cost Reduction' tool (recession-proofing) rather than just 'Innovation'.
  - Probability: 0.5

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 9.
  - Mode: Loss of Focus
  - Owner: CEO
  - Score: 3
  - Impact: 4
  - Status: open

- Mitigation: Strictly define the 'Ideal Customer Profile' (ICP) and reject meetings outside this profile for the first 12 months. Board reviews will focus solely on metrics related to this ICP.
- Probability: 0.4

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 10.
  - Mode: Go-To-Market Failure
  - Owner: CRO
  - Score: 7
  - Impact: 5
  - Status: open
  - Mitigation: Shift from direct sales to a high-touch partnership model with existing financial data providers (e.g., Bloomberg, Refinitiv) to lower CAC. Implement an automated lead nurturing system to qualify leads before human contact.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 11.
  - Mode: Co-Founder Conflict
  - Owner: Board
  - Score: 3
  - Impact: 5
  - Status: open
  - Mitigation: Formalize a Founder Agreement with 4-year vesting and 1-year cliff. Establish a weekly 'Founders Alignment' meeting to discuss ideology and strategy differences before they escalate.
  - Probability: 0.3

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 12.
  - Mode: Zombie Corporation
  - Owner: CFO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Set 'Unit Economic Profitability' as the primary goal for Year 2, rather than just revenue growth. Ensure the £30M raise covers the path to cash-flow positive or a clear Series B milestone.

- Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]

Initial\_idea: A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.

Problem: First-time founders and corporate innovators suffer from 'false confidence' (building things nobody wants) and 'analysis paralysis' (getting stuck in research mode). Existing tools are disconnected; Trello manages tasks but doesn't validate ideas, while consultants are expensive and slow. There is no centralized, cost-effective solution that bridges the gap between a rough napkin sketch and an investor-ready business plan.

Value proposition: Unlike generic business plan templates or static checklists, this platform functions as an active co-founder. It bridges the gap between ideation and execution by turning subjective brainstorming into objective, data-backed validation scores. By offering a seamless transition from a 'quick check' to a 'comprehensive investor deck,' it eliminates the friction of starting over and significantly reduces the time and cost associated with traditional market research.

Target market: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Ip And Patents

- Has I P: No
- Patent Status: None identified
- Trade Secrets: Training methodologies, Data pipeline architecture, The specific composition of the investor datasets
- Patent Strength: none

## Market Sizing

### Top Down

#### Sam

- Value: 5500000000

#### Citation

- [...]
- Currency: GBP
- Reasoning: Filtered to the 'Early-Stage Startup Ecosystem' (founders raising Pre-Seed to Series A) and the 'Virtual Assistant/AI Automation' subset of the consulting market. This represents the segment actively seeking validation and automation tools.

## Som

- Value: 275000000

## Citation

- [...]
- Currency: GBP
- Reasoning: Targeting 5% of the SAM. This assumes capturing a niche of tech-focused solo founders and SMEs who are 'AI-native' and actively automating their due diligence process, excluding non-technical traditional businesses.

## Tam

- Value: 42500000000

## Citation

- [...]
- Currency: GBP
- Methodology: Derived from the global SaaS market size (~\$300B) and the global Business Consulting market (~\$350B), converting to GBP and taking 80% to account for the specific addressable sectors of technology and business services.

## Bottom Up

## Assumptions

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Methodology: Calculated as (Annual Active Startups x AI-Adoption Rate) x SaaS Subscription Fee. Focuses on the immediate volume of companies that can be served digitally without high-touch sales.
- Market Opportunity: 180000000
- Target Customer Count: 600000
- Average Annual Revenue: 300
- Retained Revenue Percentage: 1
- Warnings: CRITICAL: The Year 7 ARR projection (£60m) falls below the £100m investor threshold for a 'venture scale' return. To achieve a £100m ARR, the platform must either increase pricing (Enterprise tiers) or expand the scope beyond 'Early Stage' into 'Growth Stage' corporate innovation., The 'Consulting Replacement' value prop is strong, but pricing at £25/mo requires very high volume (50k+ users) to hit significant revenue milestones. Consider a high-ticket 'Done-For-You' tier., Customer churn risk is high in the 'Valley of Death' segment as many startups fail before they can pay for the full year.

## Growth Rate

- Value: 1.2



## Citation

- Year: 2024
- Source: Industry Standard SaaS CAGR for Early Stage Vertical AI
- Source Url: <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights>
- Confidence: medium
- Source Type: analyst

## Arr Potential

- Year3: 2500000
- Year5: 15000000
- Year7: 60000000
- Meets Minimum Threshold: No

## Timeline View

## Total Market

- Size: 180000000
- Timeframe: Year 4-7+
- Description: Global 'Co-founder OS' for all early-stage ventures, displacing traditional consulting for this segment.

## Launch Market

- Size: 3000000
- Timeframe: Year 1-2
- Description: UK & US Solo Founders validating ideas. Capturing 1,000 paying customers at £25/mo.

## Expansion Market

- Size: 45000000
- Timeframe: Year 2-4
- Description: Expansion to EU and inclusion of Micro-SMEs (teams <5) using the 'Fundraising Room' feature.
- Unit Of Measurement: GBP (annualised retained revenue)

## Prior Funding

- Raised: 0
- Sources: Bootstrapped
- Current Cap Table: 100% Founders

## Revenue Model

- Warnings: High churn in the bottom tier is a strategic certainty, not a bug; focus on monetizing the transition to 'Validator' quickly., Support costs must remain automated; human onboarding for 'Ideator' tier will destroy unit economics.

## Sales Model

- Type: self-serve
- Sales Cycle: 3-5 days for Ideator; 14-30 days for Validator/Fundable as users validate data.
- Funnel Stages: Awareness (Content/SEO), Lead Magnet (Free 'Idea Score' tool), Freemium/Free Trial, Aha! Moment (First Deep Dive Report), Paid Conversion, Expansion (Upgrading to Fundable)

## Pricing Risks

### Overpricing

- Risk: low
- Reasoning: Compared to the cost of failure (wasted dev time) or agency fees, £149/mo is a trivial expense for a verified business model and pitch deck.

### Misalignment

- Risk: low
- Reasoning: Tiered pricing aligns directly with the founder's maturity stage; users pay more only when they require deeper, high-value data synthesis for investors.

### Race To Bottom

- Risk: medium
- Reasoning: Generic AI wrappers (ChatGPT) are cheaper, but they lack the structured, investor-specific workflow and 'Fundraising Readiness Room' that creates high switching costs.

## Pricing Tiers

- Ideator
  - Price: 1900
  - Features: 5-Minute Sprints, Basic Hypothesis Testing, Lean Canvas Generator, Community Support
  - Billing Cycle: monthly
  - Target Customer: Solo founders at the 'napkin sketch' stage needing rapid validation.
  - Competitive Justification: Positioned as a premium alternative to ChatGPT Plus (\$20/mo) by offering specialized, structured startup frameworks rather than raw text generation.
  - Estimated Adoption Percent: 0.6
- Validator
  - Price: 4900
  - Features: All Ideator features, Deep Dive Autonomous Research, Financial Modeling Engine, Competitor Landscapes, Priority Email Support
  - Billing Cycle: monthly
  - Target Customer: Pre-seed teams preparing for formal accelerator applications or angel investment.
  - Competitive Justification: Undercuts Asana Premium (\$10.79/user) by replacing generic task management with automated due diligence, saving thousands versus hiring a consultant.
  - Estimated Adoption Percent: 0.3
- Fundable
  - Price: 14900
  - Features: All Validator features, Fundraising Readiness Room, Auto-generated Pitch Decks, Investor Narrative Crafting, API Access (SEO/App Store), Dedicated Success Manager

- Billing Cycle: monthly
- Target Customer: Micro-SMEs and serious founders actively raising capital within 6 months.
- Competitive Justification: Drastically cheaper than a fractional CFO or consultant (min \$5000/mo) and superior to generic PM tools like Notion (\$10/mo) for investor outcomes.
- Estimated Adoption Percent: 0.1
- Primary Model: subscription

## Churn Estimate

## Citation

- Year: 2023
- Source: KeyBanc Capital Markets SaaS Survey 2023
- Source Url: <https://www.keybanc.com/survey>
- Confidence: high
- Source Type: industry-report
- Reasoning: High churn is expected in the 'Ideator' tier due to the high failure rate of early-stage startups. However, the 'Fundable' tier will exhibit significantly higher retention as users are actively leveraging the platform for investor meetings.
- Monthly Churn: 0.08
- Model Rationale: High-margin recurring revenue aligns with the 'virtual co-founder' value proposition, ensuring founders retain the product throughout the critical pre-seed to seed validation cycle.
- Revenue Narrative: We capture value at the critical inflection point between 'idea' and 'fundable'. By automating the expensive consultant role with software, we achieve high margins. Revenue scales as founders succeed: they start with low-cost 'Sprints' and increase ARPA when they require the 'Fundraising Room' to secure capital, directly aligning our revenue with their success.

## Competitor Pricing

- 1.
  - Model: Generic Subscription
  - Price: \$20/mo
  - Competitor: ChatGPT Plus
- 2.
  - Model: Per-user SaaS
  - Price: \$10.79/mo per user
  - Competitor: Asana Premium
- 3.
  - Model: Service Contract
  - Price: \$5000+/mo retainer
  - Competitor: Fractional CFO

## Support Requirements

- Level: low
- Estimated Cost Per Customer: 200

## Team Snapshot

## Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

## Key Hires

- 1.
  - Role: CTO / Lead Engineer
  - Filled: No
  - Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No
  - Critical Gap: Yes

## Advisory Board

- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:

1. Founder names, current roles, and ownership splits.
2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
3. Prior startup outcomes (exits, failures, or lessons learned).
4. Documented role agreements and vesting schedules (critical for early-stage trust).
5. Identified critical hires (e.g., Technical Lead) and their target start dates.
6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes
- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Annual Summary

- 1.
  - Year: 1
  - Ebitda: -12000000
  - Cash End: 981250000
  - Revenue: 12000000
  - Headcount: 3
  - Gross Margin Pct: 0.9
- 2.
  - Year: 2
  - Ebitda: 5400000
  - Cash End: 982450000
  - Revenue: 54000000
  - Headcount: 5
  - Gross Margin Pct: 0.9
- 3.
  - Year: 3
  - Ebitda: 19800000
  - Cash End: 1004050000
  - Revenue: 81000000
  - Headcount: 9
  - Gross Margin Pct: 0.9
- 4.
  - Year: 4
  - Ebitda: 34200000
  - Cash End: 1058250000
  - Revenue: 108000000
  - Headcount: 12
  - Gross Margin Pct: 0.9
- 5.
  - Year: 5
  - Ebitda: 48600000
  - Cash End: 1136850000
  - Revenue: 135000000
  - Headcount: 12
  - Gross Margin Pct: 0.9

## Dilution Model

- 1.
  - Round: Pre-seed
  - Equity Given: 0.2
  - Raise Amount: 30000000
  - Founder Ownership: 0.8
  - Pre Money Valuation: 120000000
  - Post Money Valuation: 150000000
- 2.
  - Round: Seed
  - Equity Given: 0.2
  - Raise Amount: 100000000
  - Founder Ownership: 0.64
  - Pre Money Valuation: 400000000
  - Post Money Valuation: 500000000
- 3.
  - Round: Series A
  - Equity Given: 0.2
  - Raise Amount: 300000000
  - Founder Ownership: 0.51
  - Pre Money Valuation: 1200000000
  - Post Money Valuation: 1500000000

## Unit Economics

- CAC: 250000
- LTV: 750000
- LTV CAC Ratio: 3
- Payback Months: 10

## Key Assumptions

- 1.
  - Assumption: Initial CAC of £2,500 per customer.
  - Impact If Wrong: Higher CAC will significantly extend payback period and reduce runway.
  - Source Or Justification: Based on industry benchmarks for B2B SaaS with direct sales teams.
- 2.
  - Assumption: Monthly churn rate is capped at 2.5%.
  - Impact If Wrong: Increased churn will destroy LTV and make unit economics unviable.
  - Source Or Justification: Assumes high product-market fit and sticky proprietary AI data.
- 3.
  - Assumption: Average Revenue Per User (ARPU) is £25,000 annually.
  - Impact If Wrong: Lower pricing will require significantly higher volume to hit targets.
  - Source Or Justification: Derived from proposed pricing tiers for enterprise-grade AI analytics.
- 4.
  - Assumption: 90% Gross Margin on software services.
  - Impact If Wrong: Lower margins will reduce EBITDA and require more capital to scale.
  - Source Or Justification: Standard for SaaS; assumes low incremental compute cost per user.
- 5.
  - Assumption: Headcount costs scale linearly with team size.
  - Impact If Wrong: Rising salary demands could increase burn rate faster than anticipated.

- Source Or Justification: Assumes average salary of £83,000 per employee fully burdened.

## Market Position

### Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

### Competitors

- Project Management Tools (Trello, Asana, Notion)
  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
  - Weaknesses: Passive repositories that require users to generate their own insights., No mechanism to validate if the tasks being completed are the \*right\* tasks., Cannot generate financial models or assess market viability objectively.
  - Market Share: Dominant in workflow organization, but 0% share in automated validation.
  - What They Charge: Freemium to ~\$20/user/month
- Traditional Consultants & Agencies
  - Strengths: Provide high-touch, human expertise and custom strategic guidance., Credibility and trust associated with established professional firms., Can offer nuanced, industry-specific advice.
  - Weaknesses: Prohibitively expensive for early-stage founders (often \$10k+ per engagement)., Slow turnaround times (weeks/months) which kills startup momentum., Opacity of process; founders often become dependent rather than empowered.
  - Market Share: Niche, serving well-funded entities only.
  - What They Charge: \$5,000 - \$50,000+ per project
- Generative AI Wrappers (ChatGPT, Claude)
  - Strengths: Instant access to general knowledge and brainstorming capabilities., Extremely low cost (free to low subscription fees)., Rapidly improving text generation capabilities.
  - Weaknesses: Lack specialized architecture for due diligence (no 'Deep Dive' mode)., Prone to 'hallucinations' and lack of data fidelity without API integration., Require high prompt engineering skill to get investor-grade output.
  - Market Share: Generic tool usage.
  - What They Charge: \$0 - \$20/month

### Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
  - Investor Framing: We don't just organize the work; we qualify the work. By automating the validation process, we act as an active co-founder, ensuring resources are only spent on viable opportunities.
- 2.
  - Claim: Zero-Mile Investor Readiness

- Evidence: The 'Fundraising Readiness Room' transforms validated data directly into pitch decks and narratives, bridging the gap between 'napkin sketch' and 'investor-ready'.
- Investor Framing: We compress the time-to-raise by converting validated market data into investor assets instantly. This solves the 'last mile' problem where founders have data but don't know how to sell it.
- 3.
  - Claim: Enterprise-Grade Validation at Startup Speed
  - Evidence: Offers the depth of a consultant's report (Deep Dive mode) at a SaaS price point, with a '5-Minute Sprint' for rapid hypothesis testing.
  - Investor Framing: We democratize access to high-end due diligence. We offer a 10x cost advantage over consultants while providing significantly higher analytical rigor than a blank canvas.
- Switching Barriers: Founder Ego: Founders are emotionally attached to their ideas and may resist objective data suggesting their concept is weak., Trust in AI Output: Convincing users that an automated platform can perform due diligence as rigorously as a human expert., Workflow Disruption: Moving from a loose collection of notes and chats to a structured validation platform requires a behavioral shift from 'chaos' to 'process'.
- Existing Customer Tools: Trello / Asana / Jira (for task tracking), Microsoft Excel / Google Sheets (for financial modeling), ChatGPT / Claude (for brainstorming), Figma / PowerPoint (for pitch deck design), Consultants / Agencies (for market validation)
- Competitive Landscape Summary: The market is currently bifurcated between cheap, passive organizational tools (Trello/Notion) and expensive, slow human services (Consultants). There is a massive gap in the middle for intelligent, automated validation. While generic AI (ChatGPT) is a threat, it lacks the specialized structure and API integrations to provide reliable, investor-grade due diligence. Our platform captures this gap by offering the rigor of a consultant at the speed of software. The primary risk is not competition, but user adoption of AI-driven objectivity over human intuition.

Raise Rationale: Raising £300k to secure 24 months of runway, allowing the team to build the proprietary MVP, secure the exclusive senior investor datasets, and validate the LTV:CAC model with initial pilot customers before a Seed raise.

## Top Risks Ranked

- 1.
  - Mode: Running Out of Money
  - Score: 8
- 2.
  - Mode: Go-To-Market Failure
  - Score: 7
- 3.
  - Mode: Not Enough Product Need
  - Score: 6

## Runway From Raise

- Months: 12
- Milestones Achievable: Build and launch proprietary AI MVP trained on exclusive datasets, Secure first 10 paying customers and validate unit economics

## Business Overview

- Current Stage: idea
- Pain Severity: need-to-have



- **Traction Summary:** Currently in the concept phase with a defined technical architecture and feature set. The founder has identified a clear product roadmap including a modular dual-mode engine and specific API integrations (SEO, App Store) to enhance data fidelity. The strategy is currently focused on validating the core value proposition before full-scale development.
- **Customer Evidence:** The business concept addresses a validated market gap where existing tools (Trello, Asana) and service providers (Consultants) fail to meet the needs of solo founders and SME innovators. The proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback from early users to confirm product-market fit before committing to heavy AI engineering costs.
- **Problem Statement:** Early-stage founders face a critical 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current solutions are broken: project management tools like Trello organize tasks but don't validate viability, while hiring consultants or agencies is too costly and slow for pre-revenue teams. There is no centralized, cost-effective mechanism to objectively score an idea's potential before investing significant capital.
- **Investor Narrative:** Every investor knows the #1 reason startups fail: building something nobody wants. For the solo founder or corporate innovator, the journey from 'idea' to 'venture-backed' is a minefield of expensive guesswork and disconnected tools. They either suffer from 'false confidence,' building in a vacuum, or 'analysis paralysis,' stuck in research mode with no clear path forward. They don't need another to-do list; they need a system that tells them if the to-do list is even worth doing.

Our platform is the first AI-powered 'Chief of Staff' designed to solve this. We don't just organize tasks; we validate the business itself. Through a dual-mode engine, founders can run a rapid '5-Minute Sprint' to test a hypothesis, or trigger a 'Deep Dive' to auto-generate investor-grade financial models, competitor landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

- **Solution Description:** A virtual 'Chief of Staff' SaaS platform that automates the due diligence process. It operates on a dual-mode engine: a '5-Minute Sprint' for rapid, Lean hypothesis testing, and a 'Deep Dive' mode that autonomously generates comprehensive validation reports, financial models, and competitor landscapes. Crucially, the platform features a 'Fundraising Readiness Room' that transforms this validated data directly into investor-ready pitch decks and narratives. By using a model-agnostic backend, the system ensures high-quality, objective output, effectively acting as an active co-founder that guides the user from 'napkin sketch' to 'investor-ready' in a fraction of the traditional time.

## Fast Follower Risk

- **Mitigations:** Focus on workflow integration and user experience (UX) as a lock-in mechanism, not just the model output., Build a 'Data Flywheel': Use the product to generate \*new\* proprietary data that incumbents don't have., Target a niche beachhead where incumbents are too slow to move.
- **Replication Ease:** moderate
- **Time To Replicate:** 6-12 months for a determined incumbent with existing data assets.
- **Established Player Threat:** Critical. Established players (Banks, Hedge Funds, Bloomberg Terminal) already possess the 'Golden Copy' of this data—the own proprietary transaction history. They do not need your dataset to build your product; they only need to copy your feature set.

**Investor Narrative:** We are currently in a 'stealth mode' regarding our defensibility, relying on a temporary data advantage. Our narrative must shift from 'We have unique data' to 'We have a unique workflow that captures unique data.' To survive due diligence, we must demonstrate that our in-house model provides a

signal-to-noise ratio that generic models cannot achieve, and we must prove we are building a workflow layer that makes switching painful. Currently, we are vulnerable to the 'Bloomberg Problem'—where incumbents use their superior data to crush our feature set. We need to validate that customers care about this specific output immediately.

Investor Rationale: Defensible moat via exclusive proprietary datasets unavailable to competitors, validated by a strong 3x LTV:CAC ratio and a lean, high-margin operational model.

## Product Foundation

- Tech Stack: Undefined (Conceptual), Hypothetical: React/Next.js (Frontend), Hypothetical: Python/Node.js (Backend), Hypothetical: OpenAI/Anthropic APIs (LLM Layer), Hypothetical: Vector DB (RAG Context)

## Rebuild Risk

- Needed: No
- Reasoning: A rebuild is not applicable as there is no existing product. However, there is a high 'Build vs. Buy' risk. The founder must avoid building a 'wrapper' around GPT-4 that offers no defensibility. The product must be built right the first time (v1) to handle complex data orchestration, or it will fail immediately upon user testing.
- Estimated Cost: N/A (Full build required). Estimated burn for MVP: \$50k - \$100k depending on development source.
- Maturity Level: wireframe

## Technical Debt

- Level: high
- Key Areas: No Codebase: The technical debt is essentially 100% of the future work required., Integration Risk: The 'model-agnostic' promise requires building a complex abstraction layer immediately; failing to do this first will lock the product into a specific vendor (e.g., GPT-4), creating massive refactoring debt later., Data Validation: Using LLMs to generate financial models carries a high risk of 'hallucination'; without a deterministic calculation layer, the output cannot be trusted for investor readiness.
- Mitigation Plan: Prioritize the development of the 'Abstraction Layer' and 'Verification Layer' (code that checks LLM math) in the MVP. Do not build UI features until the backend logic can reliably generate accurate financial models.

## Security Posture

- Gaps: Data Privacy: Handling user ideas and business strategies requires strict data governance to prevent LLM training on user PII or trade secrets., Authentication: No identity management has been architected yet., Input Sanitization: No validation framework to prevent prompt injection attacks that could expose system prompts or data.
- Level: basic
- Product Narrative: While the value proposition addresses a clear market gap in the pre-PMF journey, the technical foundation is currently at the 'Napkin Sketch' stage. For investors, this represents maximum technical risk (Prototype/Penalty phase in Berkus Method). The proposed 'Deep Dive' features are technically ambitious, requiring complex agentic workflows and reliable data extraction—areas where current AI tech frequently struggles with accuracy. The immediate risk is that the team attempts to build a 'Full Stack' solution (Sprints + Deep Dive + Fundraising Room) simultaneously. To reach investor readiness, the technical focus must narrow to a 'Thin Vertical' slice: proving that the AI can generate \*one\* accurate financial model or \*one\* validated market insight before building the surrounding platform.
- Architecture Pattern: Conceptual Service-Oriented Architecture (SOA) proposed, consisting of a dual-mode engine ('Sprint' vs. 'Deep Dive') interfacing with model-agnostic LLM APIs. However, no code

repository, data schema, or infrastructure-as-code exists to validate this pattern.

## Scalability Assessment

- Scaling Plan: Must define a strict caching strategy and prompt optimization protocol before v1 to ensure variable costs don't scale linearly with user usage.
- Current Capacity: Zero. The product is a concept. There is no running application to assess capacity.
- Known Bottlenecks: LLM Token Costs: The 'Deep Dive' financial modeling and report generation feature is computationally expensive and prone to high API costs that could destroy unit economics before finding PMF., API Rate Limits: Reliance on third-party data sources (SEO, App Stores) for validation creates external dependency bottlenecks., Context Window Limits: Processing comprehensive 'due diligence' reports requires large context windows, increasing latency and cost.
- Scalability Readiness: low

## Seis Eis Assessment

### Eis

#### Criteria

#### Uk Based

- [...]

#### Not Listed

- [...]

#### Company Age

- [...]

#### Gross Assets

- [...]

#### Independent

- [...]

#### Employee Count

- [...]

#### Trading Activity

- [...]

#### Not In Financial Difficulty

- [...]
- Eligible: needs-review

- Max Raise Per Year: 500000000

## **Investor Benefits**

- Loss Relief: Losses can be offset against income tax
- Cgt Deferral: CGT deferral on reinvested gains
- Income Tax Relief: 30% income tax relief
- Max Investment Per Year: Up to £1M per investor per year
- Max Raise Lifetime: 1200000000

## **Seis**

## **Criteria**

### **Uk Based**

- [...]

### **Not Listed**

- [...]

### **Company Age**

- [...]

### **Gross Assets**

- [...]

### **Independent**

- [...]

### **Employee Count**

- [...]

### **Trading Activity**

- [...]
- Eligible: needs-review
- Max Raise: 25000000

## **Advance Assurance**

- Process: Confirm UK incorporation and registered office address, Draft Articles of Association (restricting share classes to ordinary only), Prepare 3-year financial projections, Draft a detailed Business Plan explaining the 'Chief of Staff' SaaS product, Complete HMRC form SEIS1 (Advance Assurance), Submit to HMRC Small Companies Enterprise Centre
- Recommended: Yes
- Estimated Timeline: 4-8 weeks

## Investor Benefits

- Loss Relief: Losses can be offset against income tax
- Cgt Exemption: No CGT on gains if shares held 3+ years
- Income Tax Relief: 50% income tax relief on investments up to £200,000/year
- Reinvestment Relief: 50% of reinvested gains exempt from CGT
- Disclaimer: This assessment is for guidance only and does not constitute financial or tax advice. Consult a qualified accountant or tax advisor for advice specific to your circumstances.

## Deal Structure

- Reasoning: For SEIS, a standard Equity (Priced) Round is the most compliant and straightforward structure. SEIS requires shares to be issued and fully paid at the time of investment. While valuations are hard at the idea stage, SEIS rules dictate that shares must be 'ordinary, fully paid, and non-redeemable'. Using Convertible Notes or SAFEs can complicate or disqualify the SEIS application because SEIS relief is claimed on the issuance of shares, not the promise of future shares.
- Recommended: equity

## Alternatives

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Cap Table Impact: A SEIS equity round will immediately dilute the founder by 20-40% (typical for idea stage) but brings in cash and 'smart money' angels. Ensure the Articles restrict share classes to Ordinary Shares only to maintain SEIS compliance. Avoid creating different share classes (e.g., 'A' shares vs 'B' shares) as this creates complex 'arrangements' that HMRC often rejects.
- Recommendation: seis
- Recommendation Reasoning: Given the 'Idea Stage' and 'Pre-revenue' status, SEIS is the most appropriate vehicle. It offers the highest tax relief (50%) which is crucial for incentivizing angels to invest at this risky, pre-validation stage. The company structure (1 employee, low assets) fits SEIS perfectly. You should look to raise the maximum £250,000 via SEIS to build the MVP and achieve initial traction before graduating to EIS for a larger Seed round.

## Post Investment Compliance

- 1.
  - Deadline: Within 6 months of share allotment or 31 October following the tax year of issue
  - Consequence: Investors lose their tax reliefs
  - Requirement: Issue SEIS3 Compliance Certificates
- 2.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status and relief clawback
  - Requirement: Maintain Gross Assets under £350k
- 3.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status
  - Requirement: Do not exceed 25 Full-Time Equivalent employees

- 4.
  - Deadline: Promptly
  - Consequence: Potential breach of Advance Assurance conditions
  - Requirement: Notify HMRC of any changes to share capital or structure

## Customer Validation

### Beachhead

- Size: 600000
- Definition: Technical Solo Founders and Non-technical Innovators in the UK & US actively validating a B2B or SaaS concept.
- Why This First: This segment suffers the highest 'opportunity cost' from wasted time building the wrong product and has the highest motivation to reach 'fundable' status quickly to secure runway.
- Geographic Scope: UK & US (High English fluency required for high-fidelity AI validation output)

### User Profiles

- 1.
  - Role: First-time Technical Founder / Solopreneur
  - Behaviour: High digital proficiency, comfortable with SaaS tools, actively consuming startup content (Y Combinator, IndieHackers), skeptical of 'magic bullet' solutions.
  - Demographics: Age 25-40, technically literate, located in major tech hubs (London, SF, NY, Remote).
  - Pain Severity: need-to-have
  - Purchasing Power: low
- 2.
  - Role: Corporate Innovator / Intrapreneur
  - Behaviour: Needs to de-risk projects before presenting to boards, values rigorous data over speed, has budget but requires compliance/security.
  - Demographics: Age 30-50, managing innovation initiatives within larger orgs.
  - Pain Severity: need-to-have
  - Purchasing Power: high

### Business Profiles

- 1.
  - Size: Solo (1 person) to Micro-SME (2-10 employees)
  - Type: Pre-seed / Idea-stage Startup Ventures
  - Pain Points: High risk of building features nobody wants (wasted dev capital), Inability to create professional-grade investor materials without expensive consultants, Analysis paralysis preventing go-to-market
  - Switching Costs: Psychological: Ego threat of an AI scoring an idea as 'weak', Process: Changing from ad-hoc note-taking to structured validation workflows, Financial: Adopting a new subscription tool before revenue generation
  - Current Solution: Fragmented stack: Trello/Notion for tasks, Excel for models, ChatGPT for brainstorming, Figma for decks.
  - Willingness To Switch: medium

## Validation Evidence

- Surveys: 0
- Interviews: 0
- Waitlist Size: 0
- Other Evidence: Founder has identified a clear product roadmap and technical architecture., Proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback., Validated market gap identified between PM tools and expensive Consultants.
- Letter Of Intent: 0

## Preliminary Unit Economics

- Viable: Yes
- Ltv Cac Ratio: 3
- Estimated C A C: 150
- Estimated L T V: 450

Defensibility Score: 3

## Monthly Projections

- 1.
  - Cogs: 0
  - Month: 1
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 997500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 2.
  - Cogs: 0
  - Month: 2
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 995000000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 3.
  - Cogs: 0
  - Month: 3
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000

- Cash Balance: 992500000
- Gross Profit: 0
- New Customers: 0
- Total Customers: 0
- Churned Customers: 0
- Operating Expenses: 2500000
- 4.
  - Cogs: 50000
  - Month: 4
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 990450000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 2
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 5.
  - Cogs: 50000
  - Month: 5
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 988400000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 4
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 6.
  - Cogs: 100000
  - Month: 6
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 986800000
  - Gross Profit: 900000
  - New Customers: 2
  - Total Customers: 6
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 7.
  - Cogs: 100000
  - Month: 7
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 985200000
  - Gross Profit: 900000



- New Customers: 3
- Total Customers: 9
- Churned Customers: 0
- Operating Expenses: 2500000
- 8.
  - Cogs: 150000
  - Month: 8
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 984050000
  - Gross Profit: 1350000
  - New Customers: 3
  - Total Customers: 12
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 9.
  - Cogs: 150000
  - Month: 9
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 982900000
  - Gross Profit: 1350000
  - New Customers: 4
  - Total Customers: 16
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 10.
  - Cogs: 200000
  - Month: 10
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 982200000
  - Gross Profit: 1800000
  - New Customers: 4
  - Total Customers: 20
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 11.
  - Cogs: 200000
  - Month: 11
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 981500000
  - Gross Profit: 1800000
  - New Customers: 5
  - Total Customers: 25

- Churned Customers: 0
- Operating Expenses: 2500000
- 12.
  - Cogs: 250000
  - Month: 12
  - Ebitda: -250000
  - Revenue: 2500000
  - Cash Burn: 250000
  - Cash Balance: 981250000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 30
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 13.
  - Cogs: 250000
  - Month: 13
  - Ebitda: -1250000
  - Revenue: 2500000
  - Cash Burn: 1250000
  - Cash Balance: 980000000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 34
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 14.
  - Cogs: 300000
  - Month: 14
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 979200000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 39
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 15.
  - Cogs: 300000
  - Month: 15
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 978400000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 44
  - Churned Customers: 1
  - Operating Expenses: 3500000

- 16.
  - Cogs: 350000
  - Month: 16
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 978050000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 50
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 17.
  - Cogs: 350000
  - Month: 17
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 977700000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 56
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 18.
  - Cogs: 400000
  - Month: 18
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977800000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 63
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 19.
  - Cogs: 400000
  - Month: 19
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977900000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 70
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 20.
  - Cogs: 450000

- Month: 20
- Ebitda: 550000
- Revenue: 4500000
- Cash Burn: 0
- Cash Balance: 978450000
- Gross Profit: 4050000
- New Customers: 9
- Total Customers: 78
- Churned Customers: 1
- Operating Expenses: 3500000
- (16 more items)

Structure Rationale: SEIS/EIS-qualifying equity is recommended for UK angels to maximise tax efficiency. Given the clear valuation metrics and the desire to avoid debt overhang on the cap table, a straight equity round is cleaner than a convertible note for this specific amount.

Investment Structure: equity

Overall Risk Narrative: Our risk assessment identifies a high-burn, high-reward profile heavily reliant on the successful deployment of our proprietary investor datasets. While our financial runway presents a timing risk relative to our next raise, our primary focus is mitigating the high Customer Acquisition Cost (CAC) through strategic partnerships and validating the acute pain points of senior investors. We are prioritizing capital efficiency and product-market fit above all else to ensure we do not become a Zombie Corporation.

# Step 14 - Quality Assurance

---

## Tools

- Vitest
  - Cost: Free (open source)
  - Purpose: Unit testing for Next.js/TypeScript frontend.
  - Category: testing
  - Integration: Runs in CI, replaces Jest for faster DX.
  - Alternatives: Jest
- Pytest
  - Cost: Free (open source)
  - Purpose: Unit and integration testing for Python AI/FastAPI services.
  - Category: testing
  - Integration: Crucial for validating financial modeling logic.
  - Alternatives: Unittest
- Playwright
  - Cost: Free (open source)
  - Purpose: E2E testing for the web application.
  - Category: automation
  - Integration: Validates complex user flows like 'Sprint' generation.
  - Alternatives: Cypress
- Percy / Chromatic
  - Cost: Free tier available
  - Purpose: Visual regression testing for the UI and generated PDF decks.
  - Category: visual
  - Integration: Catches UI regressions in Shadcn components.
  - Alternatives: Storybook
- LangSmith / Arize
  - Cost: Freemium
  - Purpose: LLM Evaluation and Tracing.
  - Category: ai\_observability
  - Integration: Tracks the quality of 'Deep Dive' generations against golden datasets.
  - Alternatives: Weights & Biases
- K6
  - Cost: Free (open source)
  - Purpose: Load testing the BullMQ queues and API endpoints.
  - Category: performance
  - Integration: Simulates multiple users running sprints simultaneously.
  - Alternatives: Artillery

## Metrics

- AI Evaluation Pass Rate
  - Owner: AI Engineer

- Target: >90% on Golden Set
- Frequency: Per Prompt Change
- Financial Calc Accuracy
  - Owner: Backend Lead
  - Target: 100% (Unit test)
  - Frequency: Per Build
- Test Automation Coverage
  - Owner: Tech Lead
  - Target: 75%
  - Frequency: Weekly
- Mean Time to Resolution (MTTR)
  - Owner: Team Lead
  - Target: <24h for Critical
  - Frequency: Monthly

## Test Types

- 1.
  - Type: LLM & Non-Deterministic Testing
  - Scope: 5-Minute Sprint outputs, 6-Pillar Deep Dive reports, Pitch Deck generation, Financial logic in Python.
  - Priority: critical
  - Frequency: On every prompt engineering change, nightly regression.
  - Description: Validating the quality, relevance, and structural integrity of AI-generated content (pitch decks, financial models).
  - Responsible: AI Engineer & QA Lead
  - Estimated Effort: 80 hours (includes creating 'Golden Datasets' and evaluators)
- 2.
  - Type: unit
  - Scope: Financial calculation formulas, Supabase RLS policies, NestJS services, React state reducers.
  - Priority: critical
  - Frequency: On every commit (pre-merge).
  - Description: Testing deterministic logic in isolation.
  - Responsible: Developers (Full Stack & AI)
  - Estimated Effort: 40 hours initial setup
- 3.
  - Type: integration
  - Scope: Next.js -> NestJS -> Python FastAPI bridges, Queue job processing, Database transactions.
  - Priority: critical
  - Frequency: On every PR, nightly builds.
  - Description: Testing service communication, specifically the Event-Driven Architecture (BullMQ/Redis).
  - Responsible: Backend Engineers
  - Estimated Effort: 50 hours
- 4.
  - Type: e2e
  - Scope: Onboarding flow, Sprint execution, Report generation/download, Auth flows.
  - Priority: high
  - Frequency: Pre-deployment to Staging, nightly.
  - Description: User journey validation through the UI.
  - Responsible: QA Engineer / Developer

- Estimated Effort: 60 hours
- 5.
  - Type: visual
  - Scope: ShadcnUI components, Pitch Deck PDF export formatting, Dashboard layouts.
  - Priority: medium
  - Frequency: On every UI PR.
  - Description: Automated screenshot regression testing.
  - Responsible: Product Designer & Developer
  - Estimated Effort: 20 hours
- 6.
  - Type: performance
  - Scope: Time-to-first-token (LLM streaming), Concurrent queue handling (BullMQ), Frontend Core Web Vitals.
  - Priority: high
  - Frequency: Weekly, before major milestones.
  - Description: Ensuring the AI platform feels responsive despite heavy processing.
  - Responsible: DevOps / Backend Lead
  - Estimated Effort: 30 hours
- 7.
  - Type: security
  - Scope: OpenAI/Anthropic API key leakage, User data isolation (Row Level Security), Input sanitization.
  - Priority: critical
  - Frequency: Continuous (SAST), Pre-release (DAST).
  - Description: Protecting sensitive founder ideas and financial data.
  - Responsible: Backend Lead
  - Estimated Effort: 20 hours setup + automated scanning

## Quality Gates

- Code Quality Gate
  - Stage: PR Merge
  - Blocking: Yes
  - Criteria: Unit tests pass (Node & Python), No critical TS errors, Linting passed, LLM Evaluator score > 80% on new prompts
  - Minimum Score: 80
  - Automated Checks: Vitest, Pytest, ESLint, Ruff
- Integration & AI Gate
  - Stage: Staging Deploy
  - Blocking: Yes
  - Criteria: E2E smoke tests pass, Financial model outputs validated manually, Queue jobs process successfully
  - Automated Checks: Playwright Smoke Suite, BullMQ Dashboard checks
- Go/No-Go for AI Features
  - Stage: Production Release
  - Blocking: Yes
  - Criteria: Golden Set Evaluation Pass, Performance baselines met (p95 latency), Security scan clean, Manual QA sign-off on Pitch Decks
  - Automated Checks: LangSmith Reports, Lighthouse CI

## Coverage Targets

- 1.
  - Area: Backend Logic (Node/Python)
  - Target: 85
  - Rationale: Financial models and event queues must be highly reliable; bugs here cause data corruption.
  - Current Benchmark: High criticality standard
- 2.
  - Area: Frontend Components
  - Target: 70
  - Rationale: UI is dynamic, but heavy reliance on Shadcn reduces need for deep component testing.
  - Current Benchmark: Standard for MVP
- 3.
  - Area: AI Evaluation (LLM)
  - Target: 90
  - Rationale: Measured by 'Semantic Similarity' or 'Rubric Pass Rate' rather than code lines. The product IS the AI output.
  - Current Benchmark: AI Application Standard

Recommendations: Prioritize testing the Financial Modeling engine (Python) early; this is a high-risk area for founders., Implement a 'Golden Set' of 10-20 diverse business ideas to run through the AI engine for every build to catch regressions in LLM output., Since the team is small (4 people), the Senior Full Stack Dev must own the E2E automation, while the AI Engineer owns the Python/LLM testing., Budget for LLM API costs in Staging; testing AI requires spending money on tokens., Use 'Deterministic Mocking' for E2E tests where possible to avoid flakiness, but run 'Real AI' tests nightly.

Testing Approach: A 'Shift-Left' strategy tailored for a high-risk AI/LLM application. Given the 'High' overall risk level and the probabilistic nature of LLM outputs, we prioritize 'Golden Set' testing for AI generations alongside traditional functional testing. We will implement a continuous testing loop where quality is validated at the unit level for deterministic code (Node/Python) and the integration level for AI agents, ensuring that the '5-Minute Sprint' and 'Deep Dive' features produce reliable, high-value outputs before reaching the user.

## Defect Management

- Process: Given the small team, use GitHub Issues directly with labels (e.g., 'ai-hallucination', 'fin-calc-bug'). Daily triage during standup.
- Triage Process: Product Designer reviews UI bugs, Senior AI Engineer reviews LLM quality, Lead reviews the rest.

## Severity Levels

- 1.
  - Sla: Immediate fix
  - Level: Critical
  - Description: Incorrect financial calculation, Data leak, App down
- 2.
  - Sla: 24 hours
  - Level: High
  - Description: AI Hallucination causing bad advice, Broken Sprint flow
- 3.
  - Sla: 48 hours
  - Level: Medium
  - Description: UI glitch in Deck export, Slow AI response



- 4.
  - Sla: Backlog
  - Level: Low
  - Description: Cosmetic UI issues, Typos

Executive Summary: For this high-risk, AI-powered SaaS, the QA strategy focuses on validating the 'untestable'—the AI outputs. We define a custom testing pyramid emphasizing LLM Evaluation and Financial Logic verification. With a small team of 4, automation is essential not just for speed, but to scale the QA capacity of the Financial Modeling Specialist and AI Engineer. The strategy mitigates the 3 critical risks by enforcing strict gates on financial accuracy and data security.

## Test Environments

- Local Development
  - Purpose: Rapid feedback for prompt engineering and logic.
  - Data Strategy: Synthetic seed data.
  - Configuration: Docker Compose (Postgres, Redis), Local LLM stubbing.
  - Refresh Schedule: On demand
- CI/Integration
  - Purpose: Fast feedback on logic and non-breaking changes.
  - Data Strategy: Minimal fixtures.
  - Configuration: GitHub Actions Runners, In-memory DB for speed.
  - Refresh Schedule: Per run
- Staging (AI Lab)
  - Purpose: Pre-production AI tuning and UAT.
  - Data Strategy: Anonymized production snapshots.
  - Configuration: Replica of Production AWS infrastructure, Real LLM API keys (with budget limits).
  - Refresh Schedule: Weekly

## Estimated Q A Effort

### Breakdown

- Manual U A T: 50
- Test Planning: 35
- Framework Setup: 40
- Ai Golden Set Creation: 40
- Automation Scripting: 80
- Financial Logic Testing: 50
- Total Hours: 295

## Automation Strategy

- Approach: Hybrid: Deterministic automation for UI, Data-driven for AI testing.
- Framework: Vitest (Frontend), Pytest (Backend), Playwright (E2E)
- Parallelization: GitHub Actions Matrix strategy for OS/Browser combinations.
- Prioritized Tests: Financial Model Calculation Accuracy, 5-Minute Sprint Input/Output flow, PDF Generation fidelity, User Onboarding & Subscription state
- Maintenance Strategy: Given the small team (4 ppl), maintenance is critical. We will use 'Test Factory' pattern for data. Flaky AI tests will be quarantined immediately to prevent CI fatigue.
- Reporting Integration: Slack alerts for CI failures, LangSmith dashboards for AI quality.

# Qa Strategy Extended

## Tools

- Vitest
  - Cost: Free (open source)
  - Purpose: Unit testing for Next.js/TypeScript frontend.
  - Category: testing
  - Integration: Runs in CI, replaces Jest for faster DX.
  - Alternatives: Jest
- Pytest
  - Cost: Free (open source)
  - Purpose: Unit and integration testing for Python AI/FastAPI services.
  - Category: testing
  - Integration: Crucial for validating financial modeling logic.
  - Alternatives: Unittest
- Playwright
  - Cost: Free (open source)
  - Purpose: E2E testing for the web application.
  - Category: automation
  - Integration: Validates complex user flows like 'Sprint' generation.
  - Alternatives: Cypress
- Percy / Chromatic
  - Cost: Free tier available
  - Purpose: Visual regression testing for the UI and generated PDF decks.
  - Category: visual
  - Integration: Catches UI regressions in Shadcn components.
  - Alternatives: Storybook
- LangSmith / Arize
  - Cost: Freemium
  - Purpose: LLM Evaluation and Tracing.
  - Category: ai\_observability
  - Integration: Tracks the quality of 'Deep Dive' generations against golden datasets.
  - Alternatives: Weights & Biases
- K6
  - Cost: Free (open source)
  - Purpose: Load testing the BullMQ queues and API endpoints.
  - Category: performance
  - Integration: Simulates multiple users running sprints simultaneously.
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## Metrics

- AI Evaluation Pass Rate
  - Owner: AI Engineer
  - Target: >90% on Golden Set
  - Frequency: Per Prompt Change
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  - Owner: Backend Lead

- Target: 100% (Unit test)
- Frequency: Per Build
- Test Automation Coverage
  - Owner: Tech Lead
  - Target: 75%
  - Frequency: Weekly
- Mean Time to Resolution (MTTR)
  - Owner: Team Lead
  - Target: <24h for Critical
  - Frequency: Monthly

## Test Types

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  - Type: LLM & Non-Deterministic Testing
  - Scope: 5-Minute Sprint outputs, 6-Pillar Deep Dive reports, Pitch Deck generation, Financial logic in Python.
  - Priority: critical
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  - Responsible: AI Engineer & QA Lead
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  - Frequency: Pre-deployment to Staging, nightly.
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  - Type: visual
  - Scope: ShadcnUI components, Pitch Deck PDF export formatting, Dashboard layouts.
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  - Priority: critical
  - Frequency: Continuous (SAST), Pre-release (DAST).
  - Description: Protecting sensitive founder ideas and financial data.
  - Responsible: Backend Lead
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  - Rationale: UI is dynamic, but heavy reliance on Shadcn reduces need for deep component testing.
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  - Area: AI Evaluation (LLM)
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  - Rationale: Measured by 'Semantic Similarity' or 'Rubric Pass Rate' rather than code lines. The product IS the AI output.
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- Recommendations: Prioritize testing the Financial Modeling engine (Python) early; this is a high-risk area for founders., Implement a 'Golden Set' of 10-20 diverse business ideas to run through the AI engine for every build to catch regressions in LLM output., Since the team is small (4 people), the Senior Full Stack Dev must own the E2E automation, while the AI Engineer owns the Python/LLM testing., Budget for LLM API costs in Staging; testing AI requires spending money on tokens., Use 'Deterministic Mocking' for E2E tests where possible to avoid flakiness, but run 'Real AI' tests nightly.
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- Triage Process: Product Designer reviews UI bugs, Senior AI Engineer reviews LLM quality, Lead reviews the rest.

## Severity Levels

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- 4.
- [...]
- Executive Summary: For this high-risk, AI-powered SaaS, the QA strategy focuses on validating the

'untestable'—the AI outputs. We define a custom testing pyramid emphasizing LLM Evaluation and Financial Logic verification. With a small team of 4, automation is essential not just for speed, but to scale the QA capacity of the Financial Modeling Specialist and AI Engineer. The strategy mitigates the 3 critical risks by enforcing strict gates on financial accuracy and data security.

## Test Environments

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  - Purpose: Rapid feedback for prompt engineering and logic.
  - Data Strategy: Synthetic seed data.
  - Configuration: Docker Compose (Postgres, Redis), Local LLM stubbing.
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- Staging (AI Lab)
  - Purpose: Pre-production AI tuning and UAT.
  - Data Strategy: Anonymized production snapshots.
  - Configuration: Replica of Production AWS infrastructure, Real LLM API keys (with budget limits).
  - Refresh Schedule: Weekly

## Estimated Q A Effort

### Breakdown

- Manual U A T: 40
- Test Planning: 30
- Framework Setup: 40
- Ai Golden Set Creation: 40
- Automation Scripting: 80
- Financial Logic Testing: 50
- Total Hours: 280

### Automation Strategy

- Approach: Hybrid: Deterministic automation for UI, Data-driven for AI testing.
- Framework: Vitest (Frontend), Pytest (Backend), Playwright (E2E)
- Parallelization: GitHub Actions Matrix strategy for OS/Browser combinations.
- Prioritized Tests: Financial Model Calculation Accuracy, 5-Minute Sprint Input/Output flow, PDF Generation fidelity, User Onboarding & Subscription state
- Maintenance Strategy: Given the small team (4 ppl), maintenance is critical. We will use 'Test Factory' pattern for data. Flaky AI tests will be quarantined immediately to prevent CI fatigue.
- Reporting Integration: Slack alerts for CI failures, LangSmith dashboards for AI quality.

# Step 14 - Valuation Modelling

---

Mode: investor

## Vrio

### Rare

- Score: 8
- Assessment: Access to proprietary, high-quality financial datasets is rare. While many startups claim proprietary data, 'senior investor supplied datasets' implies a closed loop that competitors cannot easily access via web scraping.

### Valuable

- Score: 6
- Assessment: The proprietary AI model trained on senior investor datasets is highly valuable if it delivers unique alpha or insights that public models cannot. However, without a defined problem or customer validation, 'value' is currently theoretical.

### Organized

- Score: 4
- Assessment: The company appears to possess the technical capability to build in-house models. However, the lack of customer discovery, interviews, or validation suggests the organization is product-focused rather than market-focused, which risks building a solution looking for a problem.

### Inimitable

- Score: 3
- Assessment: This is the critical weakness. Data is not a defensible moat on its own; it is a temporary accelerant. If the model's output is valuable, well-funded incumbents (Bloomberg, BlackRock, Goldman Sachs) can replicate the feature by accessing their own \*internal\* proprietary data, which is likely richer than what a startup can aggregate.
- Overall Advantage: temporary

## Moats

- 1.
  - Type: Proprietary Data (Data Asset)
  - Evidence: Exclusive access to senior investor datasets not available to public models.
  - Strength: moderate
  - Sustainability: Low to Medium. Data moats degrade as models improve and as competitors acquire similar datasets. It provides a head start, but not a finish line.
- 2.
  - Type: Technical Implementation (In-house Model)
  - Evidence: Utilization of a proprietary in-house AI model.

- Strength: weak
- Sustainability: Low. In-house AI models are becoming commoditized. The architecture is less important than the data feedback loop.

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Lock In

- Data Lock In: No
- Network Effects: No
- Switching Costs: low
- Contractual Lock In: No

## Burn Rate

- Runway Months: 48
- Current Monthly: 2500000

Currency: GBP

Warnings: Critical: Burn rate of £2.5M/mo exceeds industry norms for this stage., Critical: 12-month runway is insufficient for the planned 24-month gap to Series B., High: CAC of £250k requires immediate validation of sales model efficiency., Moderate: Lack of defined IP/Patents increases vulnerability to Fast Followers.

## Next Round

- Estimated Amount: 100000000
- Estimated Timing: Q4 2026
- Milestones Required: Fully functional proprietary AI model, 20+ paying customers with confirmed retention, CAC recovered within 12 months

Total Steps: 18

## Use Of Funds

- 1.
  - Amount: 15000000
  - Category: Product Development
  - Percentage: 0.5
  - Justification: Hire lead AI engineer and data architect to build proprietary model and integrate exclusive senior investor datasets.
- 2.
  - Amount: 9000000
  - Category: Sales & Marketing
  - Percentage: 0.3
  - Justification: Validate product-market fit by acquiring first 10 pilot customers and proving the 3x LTV:CAC ratio.
- 3.
  - Amount: 6000000
  - Category: Operations & Overhead
  - Percentage: 0.2
  - Justification: Cover server costs, proprietary data licensing fees, and founder living expenses for 24 months.



# Gtm Strategy

## Warnings

- 1.
  - Reason: Without validated messaging and conversion data, ad spend will exceed LTV. We avoid this by forcing organic validation first to establish a baseline Cost Per Lead.
  - Pitfall: Relying on paid performance marketing (Meta/Google Ads) too early
- 2.
  - Reason: This leads to high churn as hobbyists waste resources. We avoid this by strictly targeting 'Technical Solo Founders' and 'Pre-Seed Teams' who have already committed capital/time.
  - Pitfall: Targeting 'anyone with an idea' (Broad segmentation)
- 3.
  - Reason: Engineering costs would burn cash before finding PMF. We avoid this by manually generating the first reports to ensure the output is actually valuable to investors.
  - Pitfall: Building the full AI suite before validating the 'Wizard of Oz' service

## Sales Funnel

### Stages

- Awareness (Top of Funnel)
- [...]
- Lead Magnet (Idea Score)
- [...]
- Activated User (Free Trial/Freemium)
- [...]
- Paid Conversion
- [...]
- Gtm Narrative: Our GTM strategy rejects the 'spray and pray' mass-marketing approach typical of early-stage startups. Instead, we employ a 'Trust-First' methodology. By targeting the psychological pain point of 'false confidence' with a free, objective 'Idea Score,' we lower the barrier to entry. We acquire our first 100 customers through high-touch, low-cost community infiltration (IndieHackers, LinkedIn) where validation is a current hot topic. As we gather data and social proof, we transition to Product-Led Growth, allowing the quality of the 'Deep Dive' reports to drive virality. This ensures our CAC remains well below our LTV, proving unit economics before we pour capital into paid scales.

## Scaling Phases

- 1.
  - Phase: Phase 1: Trust & Validation (Months 1-6)
  - Timeframe: 6 Months
  - Expected C A C: 2500
  - Key Activities: Wizard of Oz MVP delivery, Publish 'State of Startup Failure' report, Secure 3 accelerator partnerships
  - Primary Channel: Manual Community Engagement & SEO
  - Target Customers: 100
- 2.
  - Phase: Phase 2: Product-Led Growth (Months 7-18)

- Timeframe: 12 Months
- Expected C A C: 1200
- Key Activities: Automate 'Deep Dive' reporting, Launch 'Embeddable Idea Score' widget for blogs, Implement referral program (1 month free for 1 signup)
- Primary Channel: Content Marketing & Viral Loops
- Target Customers: 1500
- 3.
  - Phase: Phase 3: Scale & Retention (Months 19-30)
  - Timeframe: 12 Months
  - Expected C A C: 8000
  - Key Activities: Scale Google Ads (high intent keywords only), Launch 'Fundable' tier upgrade campaigns, Focus on Churn reduction to extend LTV
  - Primary Channel: Paid Acquisition & Retargeting
  - Target Customers: 5000

## Cac Viability Test

- Ltv: 45000
- Ratio: 3
- Total C A C: 15000
- Rationale: The model assumes a 3-month average customer lifespan (based on 8% monthly churn) for the initial tier. LTV of £45 vs CAC of £15 yields a 3:1 ratio, which is the minimum viable threshold for SaaS. We will improve this by driving down churn.
- Sustainable: Yes

## First100 Customers

### Channels

- Founder Community Infiltration (IndieHackers/Reddit)
- [...]
- University & Accelerator Partnerships
- [...]
- SEO-Driven 'Idea Score' Lead Magnet
- [...]
- Direct LinkedIn Outreach to Pre-Seed Founders
- [...]
- Timeline: Months 1-6 (Execution Phase)
- Key Milestones: Validate 'Wizard of Oz' MVP with 20 users by Month 2, Achieve Product-Market Fit signal (40% activation rate) by Month 4, Secure first 10 paid 'Fundable' tier customers by Month 6

Raise Amount: 30000000

## Sensitivity

### Base

- Description: Standard growth model with 2.5% monthly churn and consistent sales execution.
- Year5 Revenue: 135000000

## Best

- Description: Aggressive expansion with viral adoption and upsell opportunities maximizing LTV.
- Year5 Revenue: 202500000

## Worst

- Description: Conservative churn of 5% and slower sales velocity due to market entry friction.
- Year5 Revenue: 81000000

## Failure Modes

- 1.
  - Mode: Not Enough Product Need
  - Owner: CEO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Immediately conduct structured customer interviews with 30 senior investors to validate the specific pain points our proprietary dataset addresses. Pivot the product definition based on the top 3 recurring needs identified.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
    - [...]
  - 2.
    - [...]
- 2.
  - Mode: Running Out of Money
  - Owner: CFO
  - Score: 8
  - Impact: 5
  - Status: open
  - Mitigation: Implement aggressive cash conservation measures immediately. Reduce monthly burn to £1.2M by pausing non-essential hires. Initiate a bridge raise or convertible note discussion 6 months prior to the cliff.
  - Probability: 0.8

## Evidence From Prior Steps

- 1.
    - [...]
  - 2.
    - [...]
- 3.
  - Mode: Gaps in the Team
  - Owner: CEO
  - Score: 6
  - Impact: 4

- Status: open
- Mitigation: Audit current capabilities against the 'AI Development' and 'Enterprise Sales' requirements. Hire a fractional CTO and Sales Lead immediately to plug the gap before the full-time headcount scales up.
- Probability: 0.7

### Evidence From Prior Steps

- 1.
  - [...]
  - 2.
  - [...]
- 4.
  - Mode: Competition
  - Owner: CPO
  - Score: 5
  - Impact: 4
  - Status: open
  - Mitigation: Complete a feature-gap analysis against Bloomberg Terminal and standard LLMs. Emphasize the unique value of the 'senior investor supplied datasets' as the primary differentiator in all pitch materials.
  - Probability: 0.6

### Evidence From Prior Steps

- 1.
  - [...]
  - 2.
  - [...]
- 5.
  - Mode: Fast Followers
  - Owner: CTO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Focus on 'Data Network Effects'—the more the system is used, the smarter the model gets. Lock in key customers with long-term contracts now to build a data lead before incumbents react.
  - Probability: 0.7

### Evidence From Prior Steps

- 1.
  - [...]
  - 2.
  - [...]
- 6.
  - Mode: Pricing Problems
  - Owner: CFO
  - Score: 4
  - Impact: 4
  - Status: open

- Mitigation: Adopt a value-based pricing model tied directly to ROI (e.g., % of assets under management or deal value saved). Offer a pilot program to validate willingness to pay at the £25k level.
- Probability: 0.5

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 7.
  - Mode: Prototype to Product Failure
  - Owner: CTO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Define the v1.0 architecture specifically for scalability (cloud-native, modular). Conduct a third-party technical review of the in-house model to ensure it can handle concurrent user loads before launch.
  - Probability: 0.6

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 8.
  - Mode: Poor Product Timing
  - Owner: CMO
  - Score: 4
  - Impact: 4
  - Status: open
  - Mitigation: Analyze search trends and adoption rates for similar 'AI in Fintech' tools. If the market is lukewarm, position the product as a 'Cost Reduction' tool (recession-proofing) rather than just 'Innovation'.
  - Probability: 0.5

### **Evidence From Prior Steps**

- 1.
- [...]
- 2.
- [...]
- 9.
  - Mode: Loss of Focus
  - Owner: CEO
  - Score: 3
  - Impact: 4
  - Status: open

- Mitigation: Strictly define the 'Ideal Customer Profile' (ICP) and reject meetings outside this profile for the first 12 months. Board reviews will focus solely on metrics related to this ICP.
- Probability: 0.4

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 10.
  - Mode: Go-To-Market Failure
  - Owner: CRO
  - Score: 7
  - Impact: 5
  - Status: open
  - Mitigation: Shift from direct sales to a high-touch partnership model with existing financial data providers (e.g., Bloomberg, Refinitiv) to lower CAC. Implement an automated lead nurturing system to qualify leads before human contact.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 11.
  - Mode: Co-Founder Conflict
  - Owner: Board
  - Score: 3
  - Impact: 5
  - Status: open
  - Mitigation: Formalize a Founder Agreement with 4-year vesting and 1-year cliff. Establish a weekly 'Founders Alignment' meeting to discuss ideology and strategy differences before they escalate.
  - Probability: 0.3

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 12.
  - Mode: Zombie Corporation
  - Owner: CFO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Set 'Unit Economic Profitability' as the primary goal for Year 2, rather than just revenue growth. Ensure the £30M raise covers the path to cash-flow positive or a clear Series B milestone.

- Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]

Initial\_idea: A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.

Problem: First-time founders and corporate innovators suffer from 'false confidence' (building things nobody wants) and 'analysis paralysis' (getting stuck in research mode). Existing tools are disconnected; Trello manages tasks but doesn't validate ideas, while consultants are expensive and slow. There is no centralized, cost-effective solution that bridges the gap between a rough napkin sketch and an investor-ready business plan.

Value proposition: Unlike generic business plan templates or static checklists, this platform functions as an active co-founder. It bridges the gap between ideation and execution by turning subjective brainstorming into objective, data-backed validation scores. By offering a seamless transition from a 'quick check' to a 'comprehensive investor deck,' it eliminates the friction of starting over and significantly reduces the time and cost associated with traditional market research.

Target market: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Ip And Patents

- Has I P: No
- Patent Status: None identified
- Trade Secrets: Training methodologies, Data pipeline architecture, The specific composition of the investor datasets
- Patent Strength: none

## Market Sizing

### Top Down

#### Sam

- Value: 5500000000

#### Citation

- [...]
- Currency: GBP
- Reasoning: Filtered to the 'Early-Stage Startup Ecosystem' (founders raising Pre-Seed to Series A) and the 'Virtual Assistant/AI Automation' subset of the consulting market. This represents the segment actively seeking validation and automation tools.

## Som

- Value: 275000000

## Citation

- [...]
- Currency: GBP
- Reasoning: Targeting 5% of the SAM. This assumes capturing a niche of tech-focused solo founders and SMEs who are 'AI-native' and actively automating their due diligence process, excluding non-technical traditional businesses.

## Tam

- Value: 42500000000

## Citation

- [...]
- Currency: GBP
- Methodology: Derived from the global SaaS market size (~\$300B) and the global Business Consulting market (~\$350B), converting to GBP and taking 80% to account for the specific addressable sectors of technology and business services.

## Bottom Up

## Assumptions

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Methodology: Calculated as (Annual Active Startups x AI-Adoption Rate) x SaaS Subscription Fee. Focuses on the immediate volume of companies that can be served digitally without high-touch sales.
- Market Opportunity: 180000000
- Target Customer Count: 600000
- Average Annual Revenue: 300
- Retained Revenue Percentage: 1
- Warnings: CRITICAL: The Year 7 ARR projection (£60m) falls below the £100m investor threshold for a 'venture scale' return. To achieve a £100m ARR, the platform must either increase pricing (Enterprise tiers) or expand the scope beyond 'Early Stage' into 'Growth Stage' corporate innovation., The 'Consulting Replacement' value prop is strong, but pricing at £25/mo requires very high volume (50k+ users) to hit significant revenue milestones. Consider a high-ticket 'Done-For-You' tier., Customer churn risk is high in the 'Valley of Death' segment as many startups fail before they can pay for the full year.

## Growth Rate

- Value: 1.2



## Citation

- Year: 2024
- Source: Industry Standard SaaS CAGR for Early Stage Vertical AI
- Source Url: <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights>
- Confidence: medium
- Source Type: analyst

## Arr Potential

- Year3: 2500000
- Year5: 15000000
- Year7: 60000000
- Meets Minimum Threshold: No

## Timeline View

### Total Market

- Size: 180000000
- Timeframe: Year 4-7+
- Description: Global 'Co-founder OS' for all early-stage ventures, displacing traditional consulting for this segment.

### Launch Market

- Size: 3000000
- Timeframe: Year 1-2
- Description: UK & US Solo Founders validating ideas. Capturing 1,000 paying customers at £25/mo.

### Expansion Market

- Size: 45000000
- Timeframe: Year 2-4
- Description: Expansion to EU and inclusion of Micro-SMEs (teams <5) using the 'Fundraising Room' feature.
- Unit Of Measurement: GBP (annualised retained revenue)

## Prior Funding

- Raised: 0
- Sources: Bootstrapped
- Current Cap Table: 100% Founders

## Revenue Model

- Warnings: High churn in the bottom tier is a strategic certainty, not a bug; focus on monetizing the transition to 'Validator' quickly., Support costs must remain automated; human onboarding for 'Ideator' tier will destroy unit economics.

## Sales Model

- Type: self-serve
- Sales Cycle: 3-5 days for Ideator; 14-30 days for Validator/Fundable as users validate data.
- Funnel Stages: Awareness (Content/SEO), Lead Magnet (Free 'Idea Score' tool), Freemium/Free Trial, Aha! Moment (First Deep Dive Report), Paid Conversion, Expansion (Upgrading to Fundable)

## Pricing Risks

### Overpricing

- Risk: low
- Reasoning: Compared to the cost of failure (wasted dev time) or agency fees, £149/mo is a trivial expense for a verified business model and pitch deck.

### Misalignment

- Risk: low
- Reasoning: Tiered pricing aligns directly with the founder's maturity stage; users pay more only when they require deeper, high-value data synthesis for investors.

### Race To Bottom

- Risk: medium
- Reasoning: Generic AI wrappers (ChatGPT) are cheaper, but they lack the structured, investor-specific workflow and 'Fundraising Readiness Room' that creates high switching costs.

## Pricing Tiers

- Ideator
  - Price: 1900
  - Features: 5-Minute Sprints, Basic Hypothesis Testing, Lean Canvas Generator, Community Support
  - Billing Cycle: monthly
  - Target Customer: Solo founders at the 'napkin sketch' stage needing rapid validation.
  - Competitive Justification: Positioned as a premium alternative to ChatGPT Plus (\$20/mo) by offering specialized, structured startup frameworks rather than raw text generation.
  - Estimated Adoption Percent: 0.6
- Validator
  - Price: 4900
  - Features: All Ideator features, Deep Dive Autonomous Research, Financial Modeling Engine, Competitor Landscapes, Priority Email Support
  - Billing Cycle: monthly
  - Target Customer: Pre-seed teams preparing for formal accelerator applications or angel investment.
  - Competitive Justification: Undercuts Asana Premium (\$10.79/user) by replacing generic task management with automated due diligence, saving thousands versus hiring a consultant.
  - Estimated Adoption Percent: 0.3
- Fundable
  - Price: 14900
  - Features: All Validator features, Fundraising Readiness Room, Auto-generated Pitch Decks, Investor Narrative Crafting, API Access (SEO/App Store), Dedicated Success Manager

- Billing Cycle: monthly
- Target Customer: Micro-SMEs and serious founders actively raising capital within 6 months.
- Competitive Justification: Drastically cheaper than a fractional CFO or consultant (min \$5000/mo) and superior to generic PM tools like Notion (\$10/mo) for investor outcomes.
- Estimated Adoption Percent: 0.1
- Primary Model: subscription

## Churn Estimate

## Citation

- Year: 2023
- Source: KeyBanc Capital Markets SaaS Survey 2023
- Source Url: <https://www.keybanc.com/survey>
- Confidence: high
- Source Type: industry-report
- Reasoning: High churn is expected in the 'Ideator' tier due to the high failure rate of early-stage startups. However, the 'Fundable' tier will exhibit significantly higher retention as users are actively leveraging the platform for investor meetings.
- Monthly Churn: 0.08
- Model Rationale: High-margin recurring revenue aligns with the 'virtual co-founder' value proposition, ensuring founders retain the product throughout the critical pre-seed to seed validation cycle.
- Revenue Narrative: We capture value at the critical inflection point between 'idea' and 'fundable'. By automating the expensive consultant role with software, we achieve high margins. Revenue scales as founders succeed: they start with low-cost 'Sprints' and increase ARPA when they require the 'Fundraising Room' to secure capital, directly aligning our revenue with their success.

## Competitor Pricing

- 1.
  - Model: Generic Subscription
  - Price: \$20/mo
  - Competitor: ChatGPT Plus
- 2.
  - Model: Per-user SaaS
  - Price: \$10.79/mo per user
  - Competitor: Asana Premium
- 3.
  - Model: Service Contract
  - Price: \$5000+/mo retainer
  - Competitor: Fractional CFO

## Support Requirements

- Level: low
- Estimated Cost Per Customer: 200

## Team Snapshot

## Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

## Key Hires

- 1.
  - Role: CTO / Lead Engineer
  - Filled: No
  - Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No
  - Critical Gap: Yes

## Advisory Board

- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:

1. Founder names, current roles, and ownership splits.
2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
3. Prior startup outcomes (exits, failures, or lessons learned).
4. Documented role agreements and vesting schedules (critical for early-stage trust).
5. Identified critical hires (e.g., Technical Lead) and their target start dates.
6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes
- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Annual Summary

- 1.
  - Year: 1
  - Ebitda: -12000000
  - Cash End: 981250000
  - Revenue: 12000000
  - Headcount: 3
  - Gross Margin Pct: 0.9
- 2.
  - Year: 2
  - Ebitda: 5400000
  - Cash End: 982450000
  - Revenue: 54000000
  - Headcount: 5
  - Gross Margin Pct: 0.9
- 3.
  - Year: 3
  - Ebitda: 19800000
  - Cash End: 1004050000
  - Revenue: 81000000
  - Headcount: 9
  - Gross Margin Pct: 0.9
- 4.
  - Year: 4
  - Ebitda: 34200000
  - Cash End: 1058250000
  - Revenue: 108000000
  - Headcount: 12
  - Gross Margin Pct: 0.9
- 5.
  - Year: 5
  - Ebitda: 48600000
  - Cash End: 1136850000
  - Revenue: 135000000
  - Headcount: 12
  - Gross Margin Pct: 0.9

## Dilution Model

- 1.
  - Round: Pre-seed
  - Equity Given: 0.2
  - Raise Amount: 30000000
  - Founder Ownership: 0.8
  - Pre Money Valuation: 120000000
  - Post Money Valuation: 150000000
- 2.
  - Round: Seed
  - Equity Given: 0.2
  - Raise Amount: 100000000
  - Founder Ownership: 0.64
  - Pre Money Valuation: 400000000
  - Post Money Valuation: 500000000
- 3.
  - Round: Series A
  - Equity Given: 0.2
  - Raise Amount: 300000000
  - Founder Ownership: 0.51
  - Pre Money Valuation: 1200000000
  - Post Money Valuation: 1500000000

## Unit Economics

- CAC: 250000
- LTV: 750000
- LTV CAC Ratio: 3
- Payback Months: 10

## Key Assumptions

- 1.
  - Assumption: Initial CAC of £2,500 per customer.
  - Impact If Wrong: Higher CAC will significantly extend payback period and reduce runway.
  - Source Or Justification: Based on industry benchmarks for B2B SaaS with direct sales teams.
- 2.
  - Assumption: Monthly churn rate is capped at 2.5%.
  - Impact If Wrong: Increased churn will destroy LTV and make unit economics unviable.
  - Source Or Justification: Assumes high product-market fit and sticky proprietary AI data.
- 3.
  - Assumption: Average Revenue Per User (ARPU) is £25,000 annually.
  - Impact If Wrong: Lower pricing will require significantly higher volume to hit targets.
  - Source Or Justification: Derived from proposed pricing tiers for enterprise-grade AI analytics.
- 4.
  - Assumption: 90% Gross Margin on software services.
  - Impact If Wrong: Lower margins will reduce EBITDA and require more capital to scale.
  - Source Or Justification: Standard for SaaS; assumes low incremental compute cost per user.
- 5.
  - Assumption: Headcount costs scale linearly with team size.
  - Impact If Wrong: Rising salary demands could increase burn rate faster than anticipated.

- Source Or Justification: Assumes average salary of £83,000 per employee fully burdened.

## Market Position

### Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

### Competitors

- Project Management Tools (Trello, Asana, Notion)
  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
  - Weaknesses: Passive repositories that require users to generate their own insights., No mechanism to validate if the tasks being completed are the \*right\* tasks., Cannot generate financial models or assess market viability objectively.
  - Market Share: Dominant in workflow organization, but 0% share in automated validation.
  - What They Charge: Freemium to ~\$20/user/month
- Traditional Consultants & Agencies
  - Strengths: Provide high-touch, human expertise and custom strategic guidance., Credibility and trust associated with established professional firms., Can offer nuanced, industry-specific advice.
  - Weaknesses: Prohibitively expensive for early-stage founders (often \$10k+ per engagement)., Slow turnaround times (weeks/months) which kills startup momentum., Opacity of process; founders often become dependent rather than empowered.
  - Market Share: Niche, serving well-funded entities only.
  - What They Charge: \$5,000 - \$50,000+ per project
- Generative AI Wrappers (ChatGPT, Claude)
  - Strengths: Instant access to general knowledge and brainstorming capabilities., Extremely low cost (free to low subscription fees)., Rapidly improving text generation capabilities.
  - Weaknesses: Lack specialized architecture for due diligence (no 'Deep Dive' mode)., Prone to 'hallucinations' and lack of data fidelity without API integration., Require high prompt engineering skill to get investor-grade output.
  - Market Share: Generic tool usage.
  - What They Charge: \$0 - \$20/month

### Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
  - Investor Framing: We don't just organize the work; we qualify the work. By automating the validation process, we act as an active co-founder, ensuring resources are only spent on viable opportunities.
- 2.
  - Claim: Zero-Mile Investor Readiness

- Evidence: The 'Fundraising Readiness Room' transforms validated data directly into pitch decks and narratives, bridging the gap between 'napkin sketch' and 'investor-ready'.
- Investor Framing: We compress the time-to-raise by converting validated market data into investor assets instantly. This solves the 'last mile' problem where founders have data but don't know how to sell it.
- 3.
  - Claim: Enterprise-Grade Validation at Startup Speed
  - Evidence: Offers the depth of a consultant's report (Deep Dive mode) at a SaaS price point, with a '5-Minute Sprint' for rapid hypothesis testing.
  - Investor Framing: We democratize access to high-end due diligence. We offer a 10x cost advantage over consultants while providing significantly higher analytical rigor than a blank canvas.
- Switching Barriers: Founder Ego: Founders are emotionally attached to their ideas and may resist objective data suggesting their concept is weak., Trust in AI Output: Convincing users that an automated platform can perform due diligence as rigorously as a human expert., Workflow Disruption: Moving from a loose collection of notes and chats to a structured validation platform requires a behavioral shift from 'chaos' to 'process'.
- Existing Customer Tools: Trello / Asana / Jira (for task tracking), Microsoft Excel / Google Sheets (for financial modeling), ChatGPT / Claude (for brainstorming), Figma / PowerPoint (for pitch deck design), Consultants / Agencies (for market validation)
- Competitive Landscape Summary: The market is currently bifurcated between cheap, passive organizational tools (Trello/Notion) and expensive, slow human services (Consultants). There is a massive gap in the middle for intelligent, automated validation. While generic AI (ChatGPT) is a threat, it lacks the specialized structure and API integrations to provide reliable, investor-grade due diligence. Our platform captures this gap by offering the rigor of a consultant at the speed of software. The primary risk is not competition, but user adoption of AI-driven objectivity over human intuition.

Raise Rationale: Raising £300k to secure 24 months of runway, allowing the team to build the proprietary MVP, secure the exclusive senior investor datasets, and validate the LTV:CAC model with initial pilot customers before a Seed raise.

## Top Risks Ranked

- 1.
  - Mode: Running Out of Money
  - Score: 8
- 2.
  - Mode: Go-To-Market Failure
  - Score: 7
- 3.
  - Mode: Not Enough Product Need
  - Score: 6

## Runway From Raise

- Months: 12
- Milestones Achievable: Build and launch proprietary AI MVP trained on exclusive datasets, Secure first 10 paying customers and validate unit economics

## Business Overview

- Current Stage: idea
- Pain Severity: need-to-have



- **Traction Summary:** Currently in the concept phase with a defined technical architecture and feature set. The founder has identified a clear product roadmap including a modular dual-mode engine and specific API integrations (SEO, App Store) to enhance data fidelity. The strategy is currently focused on validating the core value proposition before full-scale development.
- **Customer Evidence:** The business concept addresses a validated market gap where existing tools (Trello, Asana) and service providers (Consultants) fail to meet the needs of solo founders and SME innovators. The proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback from early users to confirm product-market fit before committing to heavy AI engineering costs.
- **Problem Statement:** Early-stage founders face a critical 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current solutions are broken: project management tools like Trello organize tasks but don't validate viability, while hiring consultants or agencies is too costly and slow for pre-revenue teams. There is no centralized, cost-effective mechanism to objectively score an idea's potential before investing significant capital.
- **Investor Narrative:** Every investor knows the #1 reason startups fail: building something nobody wants. For the solo founder or corporate innovator, the journey from 'idea' to 'venture-backed' is a minefield of expensive guesswork and disconnected tools. They either suffer from 'false confidence,' building in a vacuum, or 'analysis paralysis,' stuck in research mode with no clear path forward. They don't need another to-do list; they need a system that tells them if the to-do list is even worth doing.

Our platform is the first AI-powered 'Chief of Staff' designed to solve this. We don't just organize tasks; we validate the business itself. Through a dual-mode engine, founders can run a rapid '5-Minute Sprint' to test a hypothesis, or trigger a 'Deep Dive' to auto-generate investor-grade financial models, competitor landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

- **Solution Description:** A virtual 'Chief of Staff' SaaS platform that automates the due diligence process. It operates on a dual-mode engine: a '5-Minute Sprint' for rapid, Lean hypothesis testing, and a 'Deep Dive' mode that autonomously generates comprehensive validation reports, financial models, and competitor landscapes. Crucially, the platform features a 'Fundraising Readiness Room' that transforms this validated data directly into investor-ready pitch decks and narratives. By using a model-agnostic backend, the system ensures high-quality, objective output, effectively acting as an active co-founder that guides the user from 'napkin sketch' to 'investor-ready' in a fraction of the traditional time.

## Fast Follower Risk

- **Mitigations:** Focus on workflow integration and user experience (UX) as a lock-in mechanism, not just the model output., Build a 'Data Flywheel': Use the product to generate \*new\* proprietary data that incumbents don't have., Target a niche beachhead where incumbents are too slow to move.
- **Replication Ease:** moderate
- **Time To Replicate:** 6-12 months for a determined incumbent with existing data assets.
- **Established Player Threat:** Critical. Established players (Banks, Hedge Funds, Bloomberg Terminal) already possess the 'Golden Copy' of this data—the own proprietary transaction history. They do not need your dataset to build your product; they only need to copy your feature set.

**Investor Narrative:** We are currently in a 'stealth mode' regarding our defensibility, relying on a temporary data advantage. Our narrative must shift from 'We have unique data' to 'We have a unique workflow that captures unique data.' To survive due diligence, we must demonstrate that our in-house model provides a

signal-to-noise ratio that generic models cannot achieve, and we must prove we are building a workflow layer that makes switching painful. Currently, we are vulnerable to the 'Bloomberg Problem'—where incumbents use their superior data to crush our feature set. We need to validate that customers care about this specific output immediately.

Investor Rationale: Defensible moat via exclusive proprietary datasets unavailable to competitors, validated by a strong 3x LTV:CAC ratio and a lean, high-margin operational model.

## Product Foundation

- Tech Stack: Undefined (Conceptual), Hypothetical: React/Next.js (Frontend), Hypothetical: Python/Node.js (Backend), Hypothetical: OpenAI/Anthropic APIs (LLM Layer), Hypothetical: Vector DB (RAG Context)

## Rebuild Risk

- Needed: No
- Reasoning: A rebuild is not applicable as there is no existing product. However, there is a high 'Build vs. Buy' risk. The founder must avoid building a 'wrapper' around GPT-4 that offers no defensibility. The product must be built right the first time (v1) to handle complex data orchestration, or it will fail immediately upon user testing.
- Estimated Cost: N/A (Full build required). Estimated burn for MVP: \$50k - \$100k depending on development source.
- Maturity Level: wireframe

## Technical Debt

- Level: high
- Key Areas: No Codebase: The technical debt is essentially 100% of the future work required., Integration Risk: The 'model-agnostic' promise requires building a complex abstraction layer immediately; failing to do this first will lock the product into a specific vendor (e.g., GPT-4), creating massive refactoring debt later., Data Validation: Using LLMs to generate financial models carries a high risk of 'hallucination'; without a deterministic calculation layer, the output cannot be trusted for investor readiness.
- Mitigation Plan: Prioritize the development of the 'Abstraction Layer' and 'Verification Layer' (code that checks LLM math) in the MVP. Do not build UI features until the backend logic can reliably generate accurate financial models.

## Security Posture

- Gaps: Data Privacy: Handling user ideas and business strategies requires strict data governance to prevent LLM training on user PII or trade secrets., Authentication: No identity management has been architected yet., Input Sanitization: No validation framework to prevent prompt injection attacks that could expose system prompts or data.
- Level: basic
- Product Narrative: While the value proposition addresses a clear market gap in the pre-PMF journey, the technical foundation is currently at the 'Napkin Sketch' stage. For investors, this represents maximum technical risk (Prototype/Penalty phase in Berkus Method). The proposed 'Deep Dive' features are technically ambitious, requiring complex agentic workflows and reliable data extraction—areas where current AI tech frequently struggles with accuracy. The immediate risk is that the team attempts to build a 'Full Stack' solution (Sprints + Deep Dive + Fundraising Room) simultaneously. To reach investor readiness, the technical focus must narrow to a 'Thin Vertical' slice: proving that the AI can generate \*one\* accurate financial model or \*one\* validated market insight before building the surrounding platform.
- Architecture Pattern: Conceptual Service-Oriented Architecture (SOA) proposed, consisting of a dual-mode engine ('Sprint' vs. 'Deep Dive') interfacing with model-agnostic LLM APIs. However, no code

repository, data schema, or infrastructure-as-code exists to validate this pattern.

## Scalability Assessment

- Scaling Plan: Must define a strict caching strategy and prompt optimization protocol before v1 to ensure variable costs don't scale linearly with user usage.
- Current Capacity: Zero. The product is a concept. There is no running application to assess capacity.
- Known Bottlenecks: LLM Token Costs: The 'Deep Dive' financial modeling and report generation feature is computationally expensive and prone to high API costs that could destroy unit economics before finding PMF., API Rate Limits: Reliance on third-party data sources (SEO, App Stores) for validation creates external dependency bottlenecks., Context Window Limits: Processing comprehensive 'due diligence' reports requires large context windows, increasing latency and cost.
- Scalability Readiness: low

## Seis Eis Assessment

### Eis

#### Criteria

##### Uk Based

- [...]

##### Not Listed

- [...]

##### Company Age

- [...]

##### Gross Assets

- [...]

##### Independent

- [...]

##### Employee Count

- [...]

##### Trading Activity

- [...]

##### Not In Financial Difficulty

- [...]
- Eligible: needs-review

- Max Raise Per Year: 500000000

## **Investor Benefits**

- Loss Relief: Losses can be offset against income tax
- Cgt Deferral: CGT deferral on reinvested gains
- Income Tax Relief: 30% income tax relief
- Max Investment Per Year: Up to £1M per investor per year
- Max Raise Lifetime: 1200000000

## **Seis**

## **Criteria**

### **Uk Based**

- [...]

### **Not Listed**

- [...]

### **Company Age**

- [...]

### **Gross Assets**

- [...]

### **Independent**

- [...]

### **Employee Count**

- [...]

### **Trading Activity**

- [...]
- Eligible: needs-review
- Max Raise: 25000000

## **Advance Assurance**

- Process: Confirm UK incorporation and registered office address, Draft Articles of Association (restricting share classes to ordinary only), Prepare 3-year financial projections, Draft a detailed Business Plan explaining the 'Chief of Staff' SaaS product, Complete HMRC form SEIS1 (Advance Assurance), Submit to HMRC Small Companies Enterprise Centre
- Recommended: Yes
- Estimated Timeline: 4-8 weeks

## Investor Benefits

- Loss Relief: Losses can be offset against income tax
- Cgt Exemption: No CGT on gains if shares held 3+ years
- Income Tax Relief: 50% income tax relief on investments up to £200,000/year
- Reinvestment Relief: 50% of reinvested gains exempt from CGT
- Disclaimer: This assessment is for guidance only and does not constitute financial or tax advice. Consult a qualified accountant or tax advisor for advice specific to your circumstances.

## Deal Structure

- Reasoning: For SEIS, a standard Equity (Priced) Round is the most compliant and straightforward structure. SEIS requires shares to be issued and fully paid at the time of investment. While valuations are hard at the idea stage, SEIS rules dictate that shares must be 'ordinary, fully paid, and non-redeemable'. Using Convertible Notes or SAFEs can complicate or disqualify the SEIS application because SEIS relief is claimed on the issuance of shares, not the promise of future shares.
- Recommended: equity

## Alternatives

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Cap Table Impact: A SEIS equity round will immediately dilute the founder by 20-40% (typical for idea stage) but brings in cash and 'smart money' angels. Ensure the Articles restrict share classes to Ordinary Shares only to maintain SEIS compliance. Avoid creating different share classes (e.g., 'A' shares vs 'B' shares) as this creates complex 'arrangements' that HMRC often rejects.
- Recommendation: seis
- Recommendation Reasoning: Given the 'Idea Stage' and 'Pre-revenue' status, SEIS is the most appropriate vehicle. It offers the highest tax relief (50%) which is crucial for incentivizing angels to invest at this risky, pre-validation stage. The company structure (1 employee, low assets) fits SEIS perfectly. You should look to raise the maximum £250,000 via SEIS to build the MVP and achieve initial traction before graduating to EIS for a larger Seed round.

## Post Investment Compliance

- 1.
  - Deadline: Within 6 months of share allotment or 31 October following the tax year of issue
  - Consequence: Investors lose their tax reliefs
  - Requirement: Issue SEIS3 Compliance Certificates
- 2.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status and relief clawback
  - Requirement: Maintain Gross Assets under £350k
- 3.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status
  - Requirement: Do not exceed 25 Full-Time Equivalent employees

- 4.
  - Deadline: Promptly
  - Consequence: Potential breach of Advance Assurance conditions
  - Requirement: Notify HMRC of any changes to share capital or structure

## Customer Validation

### Beachhead

- Size: 600000
- Definition: Technical Solo Founders and Non-technical Innovators in the UK & US actively validating a B2B or SaaS concept.
- Why This First: This segment suffers the highest 'opportunity cost' from wasted time building the wrong product and has the highest motivation to reach 'fundable' status quickly to secure runway.
- Geographic Scope: UK & US (High English fluency required for high-fidelity AI validation output)

### User Profiles

- 1.
  - Role: First-time Technical Founder / Solopreneur
  - Behaviour: High digital proficiency, comfortable with SaaS tools, actively consuming startup content (Y Combinator, IndieHackers), skeptical of 'magic bullet' solutions.
  - Demographics: Age 25-40, technically literate, located in major tech hubs (London, SF, NY, Remote).
  - Pain Severity: need-to-have
  - Purchasing Power: low
- 2.
  - Role: Corporate Innovator / Intrapreneur
  - Behaviour: Needs to de-risk projects before presenting to boards, values rigorous data over speed, has budget but requires compliance/security.
  - Demographics: Age 30-50, managing innovation initiatives within larger orgs.
  - Pain Severity: need-to-have
  - Purchasing Power: high

### Business Profiles

- 1.
  - Size: Solo (1 person) to Micro-SME (2-10 employees)
  - Type: Pre-seed / Idea-stage Startup Ventures
  - Pain Points: High risk of building features nobody wants (wasted dev capital), Inability to create professional-grade investor materials without expensive consultants, Analysis paralysis preventing go-to-market
  - Switching Costs: Psychological: Ego threat of an AI scoring an idea as 'weak', Process: Changing from ad-hoc note-taking to structured validation workflows, Financial: Adopting a new subscription tool before revenue generation
  - Current Solution: Fragmented stack: Trello/Notion for tasks, Excel for models, ChatGPT for brainstorming, Figma for decks.
  - Willingness To Switch: medium

## Validation Evidence

- Surveys: 0
- Interviews: 0
- Waitlist Size: 0
- Other Evidence: Founder has identified a clear product roadmap and technical architecture., Proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback., Validated market gap identified between PM tools and expensive Consultants.
- Letter Of Intent: 0

## Preliminary Unit Economics

- Viable: Yes
- Ltv Cac Ratio: 3
- Estimated C A C: 150
- Estimated L T V: 450

Defensibility Score: 3

## Monthly Projections

- 1.
  - Cogs: 0
  - Month: 1
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 997500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 2.
  - Cogs: 0
  - Month: 2
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 995000000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 3.
  - Cogs: 0
  - Month: 3
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000

- Cash Balance: 992500000
- Gross Profit: 0
- New Customers: 0
- Total Customers: 0
- Churned Customers: 0
- Operating Expenses: 2500000
- 4.
  - Cogs: 50000
  - Month: 4
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 990450000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 2
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 5.
  - Cogs: 50000
  - Month: 5
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 988400000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 4
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 6.
  - Cogs: 100000
  - Month: 6
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 986800000
  - Gross Profit: 900000
  - New Customers: 2
  - Total Customers: 6
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 7.
  - Cogs: 100000
  - Month: 7
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 985200000
  - Gross Profit: 900000



- New Customers: 3
- Total Customers: 9
- Churned Customers: 0
- Operating Expenses: 2500000
- 8.
  - Cogs: 150000
  - Month: 8
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 984050000
  - Gross Profit: 1350000
  - New Customers: 3
  - Total Customers: 12
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 9.
  - Cogs: 150000
  - Month: 9
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 982900000
  - Gross Profit: 1350000
  - New Customers: 4
  - Total Customers: 16
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 10.
  - Cogs: 200000
  - Month: 10
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 982200000
  - Gross Profit: 1800000
  - New Customers: 4
  - Total Customers: 20
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 11.
  - Cogs: 200000
  - Month: 11
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 981500000
  - Gross Profit: 1800000
  - New Customers: 5
  - Total Customers: 25

- Churned Customers: 0
- Operating Expenses: 2500000
- 12.
  - Cogs: 250000
  - Month: 12
  - Ebitda: -250000
  - Revenue: 2500000
  - Cash Burn: 250000
  - Cash Balance: 981250000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 30
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 13.
  - Cogs: 250000
  - Month: 13
  - Ebitda: -1250000
  - Revenue: 2500000
  - Cash Burn: 1250000
  - Cash Balance: 980000000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 34
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 14.
  - Cogs: 300000
  - Month: 14
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 979200000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 39
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 15.
  - Cogs: 300000
  - Month: 15
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 978400000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 44
  - Churned Customers: 1
  - Operating Expenses: 3500000

- 16.
  - Cogs: 350000
  - Month: 16
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 978050000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 50
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 17.
  - Cogs: 350000
  - Month: 17
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 977700000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 56
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 18.
  - Cogs: 400000
  - Month: 18
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977800000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 63
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 19.
  - Cogs: 400000
  - Month: 19
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977900000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 70
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 20.
  - Cogs: 450000

- Month: 20
- Ebitda: 550000
- Revenue: 4500000
- Cash Burn: 0
- Cash Balance: 978450000
- Gross Profit: 4050000
- New Customers: 9
- Total Customers: 78
- Churned Customers: 1
- Operating Expenses: 3500000
- (16 more items)

Structure Rationale: SEIS/EIS-qualifying equity is recommended for UK angels to maximise tax efficiency. Given the clear valuation metrics and the desire to avoid debt overhang on the cap table, a straight equity round is cleaner than a convertible note for this specific amount.

## Valuation Modelling

### Methods

- Berkus Method
  - Value: 100000000
  - Applicability: Pre-revenue, concept stage. Low score due to missing team/tech.
  - Defensibility: high
- Scorecard Method
  - Value: 250000000
  - Applicability: Based on £2.5M avg comp. Adjusted down for 'Idea' stage & unknown team.
  - Defensibility: medium
- Comparable Company
  - Value: 250000000
  - Applicability: Aligned with Scorecard using £2.5M anchor adjusted for execution risk.
  - Defensibility: medium
- VC Method
  - Value: 1375000000
  - Applicability: Based on £27.5M SOM exit & 20x ROI. Highly optimistic for pre-revenue.
  - Defensibility: low
- Warnings: Plausibility Alert: The VC Method requires a £27.5M exit (20x on £1.375M). This exceeds the £27.5M SOM, making a 20x return impossible at that valuation. Stick to £2.5M headline where 20x (£50M) is feasible within SAM.

### Dilution Model

- 1.
  - Round Name: Pre-seed
  - Raise Amount: 50000000
  - Pre Money Valuation: 100000000
  - Post Money Valuation: 150000000
  - Founder Ownership After: 0.666
- 2.
  - Round Name: Seed
  - Raise Amount: 300000000
  - Pre Money Valuation: 600000000

- Post Money Valuation: 900000000
- Founder Ownership After: 0.444
- 3.
  - Round Name: Series A
  - Raise Amount: 1000000000
  - Pre Money Valuation: 2500000000
  - Post Money Valuation: 3500000000
  - Founder Ownership After: 0.317
- Reconciliation: Berkus sets the floor at £1M due to high execution risk (no team/MVP). Comparables/Scorecard anchor £2.5M, factoring in strong market size. The VC Method spikes to £13.75M based on SOM/ROI, which is unrealistic for this stage and excluded from the headline range.

## Suggested Range

- Low: 100000000
- High: 350000000
- Currency: GBP
- Headline: 250000000
- Negotiation Guidance: Anchor negotiations at £2.5M using the Comparable Company method. Justify a floor of £1M via Berkus due to early stage. Be prepared to accept £1.5M-£2M if the investor challenges team risk.

Investment Structure: equity

Overall Risk Narrative: Our risk assessment identifies a high-burn, high-reward profile heavily reliant on the successful deployment of our proprietary investor datasets. While our financial runway presents a timing risk relative to our next raise, our primary focus is mitigating the high Customer Acquisition Cost (CAC) through strategic partnerships and validating the acute pain points of senior investors. We are prioritizing capital efficiency and product-market fit above all else to ensure we do not become a Zombie Corporation.

# Step 15 - Deployment Planning

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## Monitoring

- Apm Tool: Sentry
- Metrics: p95 Latency for Deep Dive generation, Queue Depth (BullMQ), LLM API Error Rates, DB Connection Pool usage
- Dashboards: AI Agent Latency (Time to first token), Deep Dive Completion Rate, Cost per Report (LLM Token Spend), User Churn
- Logging Stack: Datadog (Logs + Metrics) or AWS CloudWatch
- Alerting System: Sentry Alerts + Slack Webhooks
- Uptime Monitoring: Pingdom / UptimeRobot

## Cicd Pipeline

- Lint & Type Check
  - Steps: ESLint/Prettier (Frontend), Black/Ruff (Python), TSC (TypeScript), Tests
  - Tools: GitHub Actions
  - Duration: 1-2 minutes
  - Triggers: Pull Request, Push to main
- Build & Push Images
  - Steps: Build Dockerfile (NestJS), Build Dockerfile (FastAPI), Push to ECR
  - Tools: Docker Buildx, AWS CLI
  - Duration: 3-5 minutes
  - Triggers: Merge to main, Git Tag
- Deploy Backend (Staging/Prod)
  - Steps: Update ECS Task Definition, Force New Deployment
  - Tools: AWS CDK / Terraform
  - Duration: 2-3 minutes
  - Triggers: Successful Image Push
- Deploy Frontend
  - Steps: Vercel Build, Deploy to Preview/Production
  - Tools: Vercel CLI
  - Duration: 1 minute
  - Triggers: Merge to main
- Integration Smoke Tests
  - Steps: Ping Health Endpoint, Test OpenAI Connection, Verify DB Connection
  - Tools: Playwright, Postman/Newman
  - Duration: 2 minutes
  - Triggers: Post-Deployment

## Environments

- Development
  - Url: localhost

- Purpose: Local development for the team of 4
- Resources: Docker Compose
- Data Handling: Local Postgres, Mock LLM responses
- Access Control: N/A (Local)
- Staging
  - Url: staging.foundervirtuos.com
  - Purpose: QA for 'Fundraising Readiness Room' & Pitch Deck generation
  - Resources: Single ECS Task (Cheapest configuration)
  - Data Handling: Anonymized dummy data, free-tier OpenAI keys
  - Access Control: Internal Team + Product Designer
- Production
  - Url: app.foundervirtuos.com
  - Purpose: Live SaaS platform for founders
  - Resources: Auto-scaling ECS Cluster (Min 1, Max 10)
  - Data Handling: Encrypted production data, Real-time API keys
  - Access Control: Auth0/Superbase Auth (End Users)

## Backup Strategy

- Frequency: Continuous (WAL) + Daily Snapshot
- Locations: AWS US-East, S3 Cross-Region Replication
- Retention: 30 days
- Recovery Time: 2 hours
- Recovery Point: 5 minutes (Point in Time Recovery)

## Infrastructure

- Frontend Hosting
  - Specs: Pro Plan - 100GB bandwidth, Edge Functions, Analytics
  - Purpose: High-performance Edge delivery of Next.js 14 application
  - Service: Vercel
  - Provider: Vercel
  - Monthly Cost: 20
- Backend Orchestration (Node.js)
  - Specs: 0.5 vCPU, 1GB RAM (Task Definition), Auto-scaling
  - Purpose: NestJS microservices handling business logic and API gateway
  - Service: AWS ECS (Fargate)
  - Provider: AWS
  - Monthly Cost: 45
- AI Processing Workers (Python)
  - Specs: Spot instances for cost-efficient long-running AI tasks
  - Purpose: FastAPI workers for LangChain/Vercel AI SDK orchestration
  - Service: AWS ECS (Fargate Spot)
  - Provider: AWS
  - Monthly Cost: 30
- Database
  - Specs: Pro Plan - 8GB RAM, 50GB Storage, Daily Backups
  - Purpose: Primary data store with RLS for multi-tenant founder data
  - Service: Supabase (PostgreSQL)
  - Provider: Supabase/ AWS

- Monthly Cost: 25
- Job Queue & Cache
  - Specs: Standard tier - Max 10,000 commands/sec
  - Purpose: BullMQ job queue for 'Deep Dive' tasks and API rate limiting
  - Service: Upstash Redis
  - Provider: Upstash
  - Monthly Cost: 10
- Vector Database (AI Context)
  - Specs: Included in Supabase Pro plan
  - Purpose: Storing embeddings for RAG (Retrieval-Augmented Generation)
  - Service: Supabase Vector (pgvector)
  - Provider: Supabase
  - Monthly Cost: 0
- Secret Management
  - Specs: Pay per secret stored (Low cost for small team)
  - Purpose: Secure rotation of OpenAI/Anthropic API keys
  - Service: AWS Secrets Manager
  - Provider: AWS
  - Monthly Cost: 1.2
- Container Registry
  - Specs: First 500GB storage free
  - Purpose: Private storage for Docker images
  - Service: AWS ECR
  - Provider: AWS
  - Monthly Cost: 0

Recommendations: Implement a 'Cost Guardrail' in the AI layer to prevent a single user from accidentally triggering 100 deep dives in a minute., Use Vercel Edge Functions to route requests to AWS Backend to hide the infrastructure complexity., Since the team is small (4 people), use Terraform or AWS CDK to manage the AWS infrastructure to prevent configuration drift., Set up a separate 'Spend Cap' alert for OpenAI/Anthropic APIs distinct from infrastructure costs.

## Scaling Strategy

### Limits

- Max Instances: 20
- Min Instances: 1
- Target Utilization: 70
- Approach: Hybrid (Horizontal for Web, Queue-based for AI)
- Triggers: BullMQ Queue Depth > 50, CPU > 75%, Memory > 80%
- Cooldown Period: 10 minutes
- Cost Implications: Deep Dive reports are resource intensive. Scaling depends heavily on concurrent 'Deep Dive' requests. Estimated \$0.50 per report in compute costs.

## Disaster Recovery

- Rpo: 5 minutes
- Rto: 4 hours
- Strategy: Pilot Light (RDS Read Replica in standby)
- Failover Process: Manual promotion of Read Replica + Route53 DNS update

Executive Summary: The deployment strategy utilizes a hybrid cloud approach: Vercel for the high-performance Next.js frontend to ensure optimal founder experience, and AWS ECS for the backend



microservices to handle the heavy, event-driven AI processing loads. The architecture is designed to support the specific '5-Minute Sprint' and 'Deep Dive' features by utilizing a robust queue system (BullMQ/Redis) to manage asynchronous AI workflows securely. Estimated monthly infrastructure costs are ~\$120, excluding LLM token costs, which are variable and estimated at \$500/month based on usage.

## Security Measures

- 1.
  - Tools: LangChain Integrations
  - Measure: PII Redaction
  - Category: data
  - Priority: critical
  - Implementation: Strip sensitive founder data before sending to LLM providers
- 2.
  - Tools: AWS VPC
  - Measure: VPC Isolation
  - Category: network
  - Priority: high
  - Implementation: ECS tasks in private subnets, ALB in public subnet only
- 3.
  - Tools: NeMo Guardrails or custom Regex
  - Measure: Prompt Injection Defense
  - Category: ai
  - Priority: medium
  - Implementation: Validate user inputs sent to '5-Minute Sprint' engine
- 4.
  - Tools: Vanta
  - Measure: SOC2 Readiness
  - Category: compliance
  - Priority: low
  - Implementation: Automated compliance scans (Vanta/Drata)

## Estimated Monthly Cost

- Total: 620
- Llm Api: 500
- Compute: 75
- Storage: 0
- Database: 25
- Bandwidth: 20

## Breakdown

- 1.
  - Cost: 20
  - Item: Vercel Pro
- 2.
  - Cost: 75
  - Item: AWS ECS (Compute)
- 3.
  - Cost: 25
  - Item: Supabase Pro

- 4.
  - Cost: 10
  - Item: Upstash Redis
- 5.
  - Cost: 0
  - Item: Sentry Error Tracking
- 6.
  - Cost: 10
  - Item: Domain/SSL
- 7.
  - Cost: 500
  - Item: LLM APIs (OpenAI/Anthropic)

## Hosting Recommendation

- Tier: Production (Enterprise-ready)
- Region: US East (N. Virginia) - Primary, with Edge locations for Frontend
- Platform: AWS (Amazon Web Services)
- Reasoning: Given the event-driven microservices architecture and the heavy processing load of AI agents ('Deep Dive' accelerators), a provider offering robust container orchestration (ECS/EKS) and managed queues (SQS/BullMQ) is required. AWS provides the best integration for the NestJS backend (Node.js) and FastAPI (Python) services, while Vercel is retained for the high-performance Next.js frontend. This hybrid approach optimizes static content delivery while handling heavy backend logic securely.
- Alternatives: Google Cloud Run (Simpler container management), Azure Container Apps

## Deployment Strategy Extended

### Monitoring

- Apm Tool: Sentry
- Metrics: p95 Latency for Deep Dive generation, Queue Depth (BullMQ), LLM API Error Rates, DB Connection Pool usage
- Dashboards: AI Agent Latency (Time to first token), Deep Dive Completion Rate, Cost per Report (LLM Token Spend), User Churn
- Logging Stack: Datadog (Logs + Metrics) or AWS CloudWatch
- Alerting System: Sentry Alerts + Slack Webhooks
- Uptime Monitoring: Pingdom / UptimeRobot

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  - Steps: ESLint/Prettier (Frontend), Black/Ruff (Python), TSC (TypeScript), Tests
  - Tools: GitHub Actions
  - Duration: 1-2 minutes
  - Triggers: Pull Request, Push to main
- Build & Push Images
  - Steps: Build Dockerfile (NestJS), Build Dockerfile (FastAPI), Push to ECR
  - Tools: Docker Buildx, AWS CLI
  - Duration: 3-5 minutes
  - Triggers: Merge to main, Git Tag

- Deploy Backend (Staging/Prod)
  - Steps: Update ECS Task Definition, Force New Deployment
  - Tools: AWS CDK / Terraform
  - Duration: 2-3 minutes
  - Triggers: Successful Image Push
- Deploy Frontend
  - Steps: Vercel Build, Deploy to Preview/Production
  - Tools: Vercel CLI
  - Duration: 1 minute
  - Triggers: Merge to main
- Integration Smoke Tests
  - Steps: Ping Health Endpoint, Test OpenAI Connection, Verify DB Connection
  - Tools: Playwright, Postman/Newman
  - Duration: 2 minutes
  - Triggers: Post-Deployment

## Environments

- Development
  - Url: localhost
  - Purpose: Local development for the team of 4
  - Resources: Docker Compose
  - Data Handling: Local Postgres, Mock LLM responses
  - Access Control: N/A (Local)
- Staging
  - Url: staging.foundervirtuos.com
  - Purpose: QA for 'Fundraising Readiness Room' & Pitch Deck generation
  - Resources: Single ECS Task (Cheapest configuration)
  - Data Handling: Anonymized dummy data, free-tier OpenAI keys
  - Access Control: Internal Team + Product Designer
- Production
  - Url: app.foundervirtuos.com
  - Purpose: Live SaaS platform for founders
  - Resources: Auto-scaling ECS Cluster (Min 1, Max 10)
  - Data Handling: Encrypted production data, Real-time API keys
  - Access Control: Auth0/Superbase Auth (End Users)

## Backup Strategy

- Frequency: Continuous (WAL) + Daily Snapshot
- Locations: AWS US-East, S3 Cross-Region Replication
- Retention: 30 days
- Recovery Time: 2 hours
- Recovery Point: 5 minutes (Point in Time Recovery)

## Infrastructure

- Frontend Hosting
  - Specs: Pro Plan - 100GB bandwidth, Edge Functions, Analytics
  - Purpose: High-performance Edge delivery of Next.js 14 application
  - Service: Vercel

- Provider: Vercel
- Monthly Cost: 20
- Backend Orchestration (Node.js)
  - Specs: 0.5 vCPU, 1GB RAM (Task Definition), Auto-scaling
  - Purpose: NestJS microservices handling business logic and API gateway
  - Service: AWS ECS (Fargate)
  - Provider: AWS
  - Monthly Cost: 45
- AI Processing Workers (Python)
  - Specs: Spot instances for cost-efficient long-running AI tasks
  - Purpose: FastAPI workers for LangChain/Vercel AI SDK orchestration
  - Service: AWS ECS (Fargate Spot)
  - Provider: AWS
  - Monthly Cost: 30
- Database
  - Specs: Pro Plan - 8GB RAM, 50GB Storage, Daily Backups
  - Purpose: Primary data store with RLS for multi-tenant founder data
  - Service: Supabase (PostgreSQL)
  - Provider: Supabase/ AWS
  - Monthly Cost: 25
- Job Queue & Cache
  - Specs: Standard tier - Max 10,000 commands/sec
  - Purpose: BullMQ job queue for 'Deep Dive' tasks and API rate limiting
  - Service: Upstash Redis
  - Provider: Upstash
  - Monthly Cost: 10
- Vector Database (AI Context)
  - Specs: Included in Supabase Pro plan
  - Purpose: Storing embeddings for RAG (Retrieval-Augmented Generation)
  - Service: Supabase Vector (pgvector)
  - Provider: Supabase
  - Monthly Cost: 0
- Secret Management
  - Specs: Pay per secret stored (Low cost for small team)
  - Purpose: Secure rotation of OpenAI/Anthropic API keys
  - Service: AWS Secrets Manager
  - Provider: AWS
  - Monthly Cost: 1.2
- Container Registry
  - Specs: First 500GB storage free
  - Purpose: Private storage for Docker images
  - Service: AWS ECR
  - Provider: AWS
  - Monthly Cost: 0
- Recommendations: Implement a 'Cost Guardrail' in the AI layer to prevent a single user from accidentally triggering 100 deep dives in a minute., Use Vercel Edge Functions to route requests to AWS Backend to hide the infrastructure complexity., Since the team is small (4 people), use Terraform or AWS CDK to manage the AWS infrastructure to prevent configuration drift., Set up a separate 'Spend Cap' alert for OpenAI/Anthropic APIs distinct from infrastructure costs.

## Scaling Strategy

### Limits

- Max Instances: 20
- Min Instances: 1
- Target Utilization: 70
- Approach: Hybrid (Horizontal for Web, Queue-based for AI)
- Triggers: BullMQ Queue Depth > 50, CPU > 75%, Memory > 80%
- Cooldown Period: 10 minutes
- Cost Implications: Deep Dive reports are resource intensive. Scaling depends heavily on concurrent 'Deep Dive' requests. Estimated \$0.50 per report in compute costs.

### Disaster Recovery

- Rpo: 5 minutes
- Rto: 4 hours
- Strategy: Pilot Light (RDS Read Replica in standby)
- Failover Process: Manual promotion of Read Replica + Route53 DNS update
- Executive Summary: The deployment strategy utilizes a hybrid cloud approach: Vercel for the high-performance Next.js frontend to ensure optimal founder experience, and AWS ECS for the backend microservices to handle the heavy, event-driven AI processing loads. The architecture is designed to support the specific '5-Minute Sprint' and 'Deep Dive' features by utilizing a robust queue system (BullMQ/Redis) to manage asynchronous AI workflows securely. Estimated monthly infrastructure costs are ~\$120, excluding LLM token costs, which are variable and estimated at \$500/month based on usage.

### Security Measures

- 1.
  - Tools: LangChain Integrations
  - Measure: PII Redaction
  - Category: data
  - Priority: critical
  - Implementation: Strip sensitive founder data before sending to LLM providers
- 2.
  - Tools: AWS VPC
  - Measure: VPC Isolation
  - Category: network
  - Priority: high
  - Implementation: ECS tasks in private subnets, ALB in public subnet only
- 3.
  - Tools: NeMo Guardrails or custom Regex
  - Measure: Prompt Injection Defense
  - Category: ai
  - Priority: medium
  - Implementation: Validate user inputs sent to '5-Minute Sprint' engine
- 4.
  - Tools: Vanta
  - Measure: SOC2 Readiness
  - Category: compliance

- Priority: low
- Implementation: Automated compliance scans (Vanta/Drata)

## Estimated Monthly Cost

- Total: 620
- Llm Api: 500
- Compute: 75
- Storage: 0
- Database: 25
- Bandwidth: 20

## Breakdown

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- 4.
- [...]
- 5.
- [...]
- 6.
- [...]
- 7.
- [...]

## Hosting Recommendation

- Tier: Production (Enterprise-ready)
- Region: US East (N. Virginia) - Primary, with Edge locations for Frontend
- Platform: AWS (Amazon Web Services)
- Reasoning: Given the event-driven microservices architecture and the heavy processing load of AI agents ('Deep Dive' accelerators), a provider offering robust container orchestration (ECS/EKS) and managed queues (SQS/BullMQ) is required. AWS provides the best integration for the NestJS backend (Node.js) and FastAPI (Python) services, while Vercel is retained for the high-performance Next.js frontend. This hybrid approach optimizes static content delivery while handling heavy backend logic securely.
- Alternatives: Google Cloud Run (Simpler container management), Azure Container Apps

# Step 15 - Deployment Strategy

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## Monitoring

- Apm Tool: Sentry
- Metrics: p95 Latency for Deep Dive generation, Queue Depth (BullMQ), LLM API Error Rates, DB Connection Pool usage
- Dashboards: AI Agent Latency (Time to first token), Deep Dive Completion Rate, Cost per Report (LLM Token Spend), User Churn
- Logging Stack: Datadog (Logs + Metrics) or AWS CloudWatch
- Alerting System: Sentry Alerts + Slack Webhooks
- Uptime Monitoring: Pingdom / UptimeRobot

## Cicd Pipeline

- Lint & Type Check
  - Steps: ESLint/Prettier (Frontend), Black/Ruff (Python), TSC (TypeScript), Tests
  - Tools: GitHub Actions
  - Duration: 1-2 minutes
  - Triggers: Pull Request, Push to main
- Build & Push Images
  - Steps: Build Dockerfile (NestJS), Build Dockerfile (FastAPI), Push to ECR
  - Tools: Docker Buildx, AWS CLI
  - Duration: 3-5 minutes
  - Triggers: Merge to main, Git Tag
- Deploy Backend (Staging/Prod)
  - Steps: Update ECS Task Definition, Force New Deployment
  - Tools: AWS CDK / Terraform
  - Duration: 2-3 minutes
  - Triggers: Successful Image Push
- Deploy Frontend
  - Steps: Vercel Build, Deploy to Preview/Production
  - Tools: Vercel CLI
  - Duration: 1 minute
  - Triggers: Merge to main
- Integration Smoke Tests
  - Steps: Ping Health Endpoint, Test OpenAI Connection, Verify DB Connection
  - Tools: Playwright, Postman/Newman
  - Duration: 2 minutes
  - Triggers: Post-Deployment

## Environments

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  - Url: localhost

- Purpose: Local development for the team of 4
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Recommendations: Implement a 'Cost Guardrail' in the AI layer to prevent a single user from accidentally triggering 100 deep dives in a minute., Use Vercel Edge Functions to route requests to AWS Backend to hide the infrastructure complexity., Since the team is small (4 people), use Terraform or AWS CDK to manage the AWS infrastructure to prevent configuration drift., Set up a separate 'Spend Cap' alert for OpenAI/Anthropic APIs distinct from infrastructure costs.

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microservices to handle the heavy, event-driven AI processing loads. The architecture is designed to support the specific '5-Minute Sprint' and 'Deep Dive' features by utilizing a robust queue system (BullMQ/Redis) to manage asynchronous AI workflows securely. Estimated monthly infrastructure costs are ~\$120, excluding LLM token costs, which are variable and estimated at \$500/month based on usage.

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  - Tools: AWS VPC
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  - Category: network
  - Priority: high
  - Implementation: ECS tasks in private subnets, ALB in public subnet only
- 3.
  - Tools: NeMo Guardrails or custom Regex
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  - Category: ai
  - Priority: medium
  - Implementation: Validate user inputs sent to '5-Minute Sprint' engine
- 4.
  - Tools: Vanta
  - Measure: SOC2 Readiness
  - Category: compliance
  - Priority: low
  - Implementation: Automated compliance scans (Vanta/Drata)

## Estimated Monthly Cost

- Total: 620
- Llm Api: 500
- Compute: 75
- Storage: 0
- Database: 25
- Bandwidth: 20

## Breakdown

- 1.
  - Cost: 20
  - Item: Vercel Pro
- 2.
  - Cost: 75
  - Item: AWS ECS (Compute)
- 3.
  - Cost: 25
  - Item: Supabase Pro

- 4.
  - Cost: 10
  - Item: Upstash Redis
- 5.
  - Cost: 0
  - Item: Sentry Error Tracking
- 6.
  - Cost: 10
  - Item: Domain/SSL
- 7.
  - Cost: 500
  - Item: LLM APIs (OpenAI/Anthropic)

## Hosting Recommendation

- Tier: Production (Enterprise-ready)
- Region: US East (N. Virginia) - Primary, with Edge locations for Frontend
- Platform: AWS (Amazon Web Services)
- Reasoning: Given the event-driven microservices architecture and the heavy processing load of AI agents ('Deep Dive' accelerators), a provider offering robust container orchestration (ECS/EKS) and managed queues (SQS/BullMQ) is required. AWS provides the best integration for the NestJS backend (Node.js) and FastAPI (Python) services, while Vercel is retained for the high-performance Next.js frontend. This hybrid approach optimizes static content delivery while handling heavy backend logic securely.
- Alternatives: Google Cloud Run (Simpler container management), Azure Container Apps

# Step 15 - Pitch Deck

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Mode: investor

## Vrio

### Rare

- Score: 8
- Assessment: Access to proprietary, high-quality financial datasets is rare. While many startups claim proprietary data, 'senior investor supplied datasets' implies a closed loop that competitors cannot easily access via web scraping.

### Valuable

- Score: 6
- Assessment: The proprietary AI model trained on senior investor datasets is highly valuable if it delivers unique alpha or insights that public models cannot. However, without a defined problem or customer validation, 'value' is currently theoretical.

### Organized

- Score: 4
- Assessment: The company appears to possess the technical capability to build in-house models. However, the lack of customer discovery, interviews, or validation suggests the organization is product-focused rather than market-focused, which risks building a solution looking for a problem.

### Inimitable

- Score: 3
- Assessment: This is the critical weakness. Data is not a defensible moat on its own; it is a temporary accelerant. If the model's output is valuable, well-funded incumbents (Bloomberg, BlackRock, Goldman Sachs) can replicate the feature by accessing their own \*internal\* proprietary data, which is likely richer than what a startup can aggregate.
- Overall Advantage: temporary

## Moats

- 1.
  - Type: Proprietary Data (Data Asset)
  - Evidence: Exclusive access to senior investor datasets not available to public models.
  - Strength: moderate
  - Sustainability: Low to Medium. Data moats degrade as models improve and as competitors acquire similar datasets. It provides a head start, but not a finish line.
- 2.
  - Type: Technical Implementation (In-house Model)
  - Evidence: Utilization of a proprietary in-house AI model.

- Strength: weak
- Sustainability: Low. In-house AI models are becoming commoditized. The architecture is less important than the data feedback loop.

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Lock In

- Data Lock In: No
- Network Effects: No
- Switching Costs: low
- Contractual Lock In: No

## Burn Rate

- Runway Months: 48
- Current Monthly: 2500000

Currency: GBP

Warnings: Critical: Burn rate of £2.5M/mo exceeds industry norms for this stage., Critical: 12-month runway is insufficient for the planned 24-month gap to Series B., High: CAC of £250k requires immediate validation of sales model efficiency., Moderate: Lack of defined IP/Patents increases vulnerability to Fast Followers.

## Next Round

- Estimated Amount: 100000000
- Estimated Timing: Q4 2026
- Milestones Required: Fully functional proprietary AI model, 20+ paying customers with confirmed retention, CAC recovered within 12 months

## Pitch Deck

### Slides

- The 'Valley of Death' for Early-Stage Founders
  - Content: Early-stage founders face a critical gap between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current tools like Trello organize tasks but fail to validate if the business itself is viable, while hiring consultants is prohibitively expensive for pre-revenue teams.
  - Section: Problem
  - Slide Number: 1
  - Source Steps: 1, 2, 6
  - Bullet Points: High failure rate due to building without objective validation, Project management tools are passive and lack strategic insight, Consultants are too slow (\$10k+) and expensive for idea-stage, No centralized mechanism to score idea potential before investing capital
  - Speaker Notes: Start by emphasizing the emotional toll of the 'Valley of Death'. Founders are terrified of wasting their time and money. Use the contrast between the cheap but useless Trello and the expensive but slow Consultant to highlight the gap in the market. Anticipated Objection: 'Can't they just use ChatGPT?' Answer: ChatGPT is a chat interface, not a rigorous validation engine; it doesn't generate the structured financial models or market data investors require.

## Key Data Points

- [...]
- Visual Suggestion: A 'Gap Analysis' graphic showing a timeline: Idea -> [The Gap: 6 months wasted time / \$10k cost] -> Funded. Place Trello (Too weak) and Consultants (Too expensive) below the gap, with our logo bridging it.

## Expected Objections

- [...]
- Your AI Chief of Staff for Fundraising Readiness
  - Content: Fundability AI is the first 'Chief of Staff' platform that automates the validation of business ideas. By replacing expensive consultants with a SaaS subscription, we take founders from a 'napkin sketch' to a fully validated, investor-ready proposition in minutes, not months. The platform features a modular dual-mode engine and specific API integrations to ensure high data fidelity for financial modeling and market analysis.
  - Section: Solution
  - Slide Number: 2
  - Source Steps: 1, 2, 4
  - Bullet Points: Automated 'Idea Scoring' replaces human bias with data, Generates investor-grade pitch decks and financial models instantly, 10x faster and cheaper than traditional consulting agencies, Wizard of Oz MVP ensures high-quality output before heavy engineering
  - Speaker Notes: Focus on the 'feeling' of relief. The user wakes up, inputs their rough idea, and by lunchtime, has a professional report telling them if they should proceed or pivot. This is not just software; it's insurance against failure. Anticipated Objection: 'Will the AI hallucinate numbers?' Answer: We use a 'Verification Layer' (deterministic calculation) to double-check the LLM's math, ensuring financial accuracy.

## Key Data Points

- [...]
- Visual Suggestion: Split screen: Left side shows a stressed founder with sticky notes and a calculator; Right side shows a clean dashboard with a green 'Fundability Score: 85/100' badge.

## Expected Objections

- [...]
- Superior Outcome, Not Just Features
  - Content: While tools like Trello and Asana dominate task management, they are passive repositories that cannot validate if a business idea is viable. Conversely, traditional consultants offer high-touch expertise but are prohibitively slow and expensive. Fundability AI occupies the 'Outcome' gap—we don't just organize tasks; we validate the business model itself, offering the speed of software with the depth of a consultant.
  - Section: Competition
  - Slide Number: 3
  - Source Steps: 2, 7
  - Bullet Points: Trello/Asana: Great for workflow, blind to viability, Consultants: Deep expertise but slow (\$10k+) and opaque, Generic AI (ChatGPT): Cheap but lacks structured fundraising workflows, Fundability AI: Objective validation in minutes for a fraction of the cost
  - Speaker Notes: Don't get bogged down in feature lists. Investors care about the 'Job to be Done'. The job is 'Get Funded'. Trello fails at this. Consultants succeed but are inefficient. We succeed

efficiently. Anticipated Objection: 'Won't Notion just build this?' Answer: Notion is a generalist tool; fundraising requires specific, deep financial modeling and market data integration that is outside their core competency.

## Key Data Points

- [...]
- Visual Suggestion: A 2x2 Matrix: X-axis = Cost (Low to High), Y-axis = Strategic Insight (Low to High). Plot Trello (Low/Low), Consultants (High/High), and Fundability AI (Low/High - The Sweet Spot).

## Expected Objections

- [...]
- Building a Moat Through Data & Workflow
  - Content: Our defensibility strategy relies on three pillars: a proprietary 'Abstraction Layer' that prevents vendor lock-in to any single LLM, a 'Verification Layer' that ensures financial accuracy (a critical barrier to entry for simple wrappers), and high switching costs created by storing the founder's entire operational history. As we scale, our aggregated data on 'what makes a fundable idea' will become a proprietary asset impossible to replicate.
  - Section: Defensibility
  - Slide Number: 4
  - Source Steps: 4, 7
  - Bullet Points: Proprietary 'Abstraction Layer' ensures model-agnostic flexibility, 'Verification Layer' eliminates AI hallucination in financial models, High switching costs: Platform becomes the 'Single Source of Truth', Data Network Effects: More users = smarter validation algorithms
  - Speaker Notes: Investors worry about 'wrapper' companies. You must explain that the magic isn't the AI model itself, but the \*orchestration\* of the data and the \*verification\* of the math. This is hard engineering. Anticipated Objection: 'Is the patent filed?' Answer: We are prioritizing 'Trade Secret' protection via our Abstraction Layer architecture, with patents to follow post-MVP.

## Key Data Points

- [...]
- Visual Suggestion: Diagram showing 'Input Data' passing through a 'Black Box' (Our Abstraction/Verification Layers) and emerging as 'Verified Output', surrounded by a shield labeled 'Switching Costs'.

## Expected Objections

- [...]
- Built for Execution
  - Content: Currently led by a solo founder with a clear technical vision, we are actively looking to complete the core leadership team. We are seeking a technical Lead to own the 'Abstraction Layer' architecture and a Growth Lead to drive our 'Trust-First' GTM strategy. We are supported by an advisory board structure designed to leverage SaaS and AI expertise.
  - Section: Team
  - Slide Number: 5
  - Source Steps: 3
  - Bullet Points: Founder: Defined technical architecture and product roadmap, Key Hires: Actively recruiting CTO and Growth Lead, Advisory Board: Structured to fill gaps in SaaS/AI domain knowledge, Culture: Disciplined 'Wizard of Oz' approach to capital efficiency

- Speaker Notes: Honesty wins here. Don't oversell a team that doesn't exist yet. Pitch the \*vision\* of the team and the discipline of the founder in identifying the right gaps. 'Bet on the jockey'—show you know what you don't know. Anticipated Objection: 'Who is building this?' Answer: I have defined the architecture and am executing a 'Wizard of Oz' MVP to validate demand before hiring the full engineering team.

## Key Data Points

- [...]
- Visual Suggestion: Org Chart showing Founder in the center, with 'CTO' and 'Growth Lead' roles as outlined 'ghost' figures, indicating immediate hiring priority.

## Expected Objections

- [...]
- Capturing the \$5.5B Validation Economy
  - Content: We operate in the intersection of the Global SaaS and Business Consulting markets. Our Serviceable Addressable Market (SAM) is the \$5.5B 'Early-Stage Startup Ecosystem' specifically seeking validation tools. We will capture this through a tiered SaaS model, starting with a 'Lead Magnet' free score and converting users to paid subscriptions as they require deeper reporting.
  - Section: Business Plan
  - Slide Number: 6
  - Source Steps: 5, 6, 8
  - Bullet Points: TAM: £42.5B (Global SaaS & Consulting), SAM: £5.5B (Early-Stage Startup Validation), SOM: £275M (5% of SAM, Tech-focused founders), Revenue Model: Tiered Subscription (Ideator to Fundable)
  - Speaker Notes: Walk investors through the funnel. We start broad with the TAM, narrow down to the SAM (people actually raising money), and focus on the SOM (people who use tech tools). The 'Idea Score' is the hook to capture the SOM. Anticipated Objection: 'Why not target the whole market?' Answer: To achieve 20x growth, we must dominate a niche (Tech Founders) first before expanding to generalists.

## Key Data Points

- [...]
- Visual Suggestion: Three concentric circles graph (TAM/SAM/SOM) with specific £ values labeled. A smaller circle inside SOM labeled 'Beachhead: 600k Founders'.

## Expected Objections

- [...]
- Validating the Path to Product-Market Fit
  - Content: We are currently in the 'Idea/Concept' phase, having completed the technical architecture and defined the product roadmap. Our immediate next step is the 'Wizard of Oz' MVP launch, designed to capture qualitative feedback and validate the core value proposition without heavy upfront capital. We have identified a clear funnel strategy: Awareness -> Lead Magnet (Free Score) -> Paid Conversion.
  - Section: Traction
  - Slide Number: 7
  - Source Steps: 1, 4, 12
  - Bullet Points: Stage: Concept / Architecture Complete, Roadmap: Modular dual-mode engine defined, Strategy: 'Wizard of Oz' MVP to minimize risk, Funnel: 'Trust-First' model targeting 5%



conversion

- Speaker Notes: Investors need to know what is real vs. what is a slide deck. Be transparent: 'We have the blueprint, now we need to build the house.' The traction here is the \*strategic clarity\* and the \*funnel math\* derived from market benchmarks. Anticipated Objection: 'You have no users?' Answer: We have identified the exact funnel metrics (40% lead magnet conversion) needed to make the unit economics work, and we are launching the MVP to prove them.

## Key Data Points

- [...]
- Visual Suggestion: Timeline graphic: 'Past' (Architecture Defined, Market Analysis), 'Present' (MVP Build), 'Future' (First 100 Users, Product Market Fit).

## Expected Objections

- [...]
- £500k for 20% Equity to Secure Market Entry
  - Content: We are raising £500,000 to bridge the gap between concept and market leader. These funds will be allocated primarily to MVP development (building the Abstraction Layer) and initial GTM efforts to acquire our first 100 customers. Our valuation of £2.5M is supported by the Scorecard and Comparable methods, factoring in the £42.5B market opportunity and current execution risk.
  - Section: The Deal
  - Slide Number: 8
  - Source Steps: 13, 14
  - Bullet Points: Raising: £500,000 (Pre-Seed), Valuation: £2.5M Pre-Money, Use of Funds: 50% Engineering, 30% Marketing, 20% Ops, Instrument: SEIS/EIS eligible (Advance Assurance pending)
  - Speaker Notes: Be firm on the valuation. £2.5M is standard for a pre-revenue SaaS with this market potential. Highlight the SEIS/EIS eligibility as a major tax benefit for UK investors. Anticipated Objection: 'That's high for no revenue.' Answer: This valuation prices in the £42.5B opportunity and the fact that we are de-risking the 'build' phase with a Wizard of Oz strategy.

## Key Data Points

- [...]
- Visual Suggestion: Simple pie chart showing 'Use of Funds' (Engineering, Marketing, Ops). Text overlay: '16.6% Ownership for £500k'.

## Expected Objections

- [...]
- Positioned for Strategic Acquisition
  - Content: The startup ecosystem is consolidating, with major players like Stripe, HubSpot, and Microsoft actively acquiring 'picks and shovels' for the creator economy. We aim to build a defensible platform with 5% SAM penetration, making us an attractive acquisition target for a major CRM or Project Management platform looking to own the 'Pre-Seed' customer journey.
  - Section: Exit Strategy
  - Slide Number: 9
  - Source Steps: 5, 11, 14
  - Bullet Points: Target Exit: Strategic Acquisition (SaaS Majors), Potential Acquirers: HubSpot, Atlassian, Salesforce, Projected Multiple: 5x - 10x Revenue (SaaS Standard), Timeline: 5-7 years to

Exit

- Speaker Notes: Angels want to know how they get their money back. Paint the picture: We own the customer at the very beginning of their journey. Companies like HubSpot pay a premium to own that data. Anticipated Objection: 'What if you don't get acquired?' Answer: With a £275M SOM and high margins, we have the potential to be a standalone cash-cow or IPO candidate, though acquisition is the most likely liquidity event.

## Key Data Points

- [...]
- Visual Suggestion: Timeline ending in a 'Flag' icon labeled 'Exit'. Below, logos of potential acquirers (HubSpot, Atlassian, etc.) connected by arrows to 'Data Source'.

## Expected Objections

- [...]
- The Ask: We are raising £500,000 at a £2.5M pre-money valuation to build the MVP, validate the 'Wizard of Oz' workflow, and secure our first 100 paying customers.
- Tagline: Automating the transition from 'Napkin Idea' to 'Fundable Startup'.
- Warnings: Team section requires specific founder details to be filled in before final presentation., Valuation is aggressive for pre-revenue; be prepared to defend with £42.5B market size., SEIS status is 'needs-review'; do not guarantee tax relief to investors until confirmed.
- Company Name: Fundability AI
- Tone Guidance: Confident yet grounded. Use data to back up every claim. Acknowledge the early stage honestly but frame it as a disciplined capital-efficiency play rather than a weakness. Be transparent about risks (like the 'Wrapper' risk) to build trust.
- Narrative Flow: The deck begins by establishing the emotional pain of the 'Valley of Death' (Problem), creating a vacuum that only our 'Chief of Staff' AI can fill (Solution). We then distinguish ourselves from passive tools and expensive consultants (Competition) before explaining the technical 'moats' that protect our business (Defensibility). We introduce the disciplined leadership executing this vision (Team) and size the massive financial opportunity (Business Plan). We ground the vision in reality with our capital-efficient MVP strategy (Traction), present the specific investment opportunity (The Deal), and conclude with the clear path to investor returns (Exit).
- Estimated Duration: 12-15 minutes total: Problem 1.5min, Solution 2min, Competition 1min, Defensibility 1min, Team 2min, Business Plan 2min, Traction 1min, The Deal 1.5min, Exit 1min

Total Steps: 18

## Use Of Funds

- 1.
  - Amount: 15000000
  - Category: Product Development
  - Percentage: 0.5
  - Justification: Hire lead AI engineer and data architect to build proprietary model and integrate exclusive senior investor datasets.
- 2.
  - Amount: 9000000
  - Category: Sales & Marketing
  - Percentage: 0.3
  - Justification: Validate product-market fit by acquiring first 10 pilot customers and proving the 3x LTV:CAC ratio.

- 3.
  - Amount: 6000000
  - Category: Operations & Overhead
  - Percentage: 0.2
  - Justification: Cover server costs, proprietary data licensing fees, and founder living expenses for 24 months.

## Gtm Strategy

### Warnings

- 1.
  - Reason: Without validated messaging and conversion data, ad spend will exceed LTV. We avoid this by forcing organic validation first to establish a baseline Cost Per Lead.
  - Pitfall: Relying on paid performance marketing (Meta/Google Ads) too early
- 2.
  - Reason: This leads to high churn as hobbyists waste resources. We avoid this by strictly targeting 'Technical Solo Founders' and 'Pre-Seed Teams' who have already committed capital/time.
  - Pitfall: Targeting 'anyone with an idea' (Broad segmentation)
- 3.
  - Reason: Engineering costs would burn cash before finding PMF. We avoid this by manually generating the first reports to ensure the output is actually valuable to investors.
  - Pitfall: Building the full AI suite before validating the 'Wizard of Oz' service

## Sales Funnel

### Stages

- Awareness (Top of Funnel)
- [...]
- Lead Magnet (Idea Score)
- [...]
- Activated User (Free Trial/Freemium)
- [...]
- Paid Conversion
- [...]
- Gtm Narrative: Our GTM strategy rejects the 'spray and pray' mass-marketing approach typical of early-stage startups. Instead, we employ a 'Trust-First' methodology. By targeting the psychological pain point of 'false confidence' with a free, objective 'Idea Score,' we lower the barrier to entry. We acquire our first 100 customers through high-touch, low-cost community infiltration (IndieHackers, LinkedIn) where validation is a current hot topic. As we gather data and social proof, we transition to Product-Led Growth, allowing the quality of the 'Deep Dive' reports to drive virality. This ensures our CAC remains well below our LTV, proving unit economics before we pour capital into paid scales.

## Scaling Phases

- 1.
  - Phase: Phase 1: Trust & Validation (Months 1-6)
  - Timeframe: 6 Months
  - Expected C A C: 2500

- Key Activities: Wizard of Oz MVP delivery, Publish 'State of Startup Failure' report, Secure 3 accelerator partnerships
- Primary Channel: Manual Community Engagement & SEO
- Target Customers: 100
- 2.
  - Phase: Phase 2: Product-Led Growth (Months 7-18)
  - Timeframe: 12 Months
  - Expected C A C: 1200
  - Key Activities: Automate 'Deep Dive' reporting, Launch 'Embeddable Idea Score' widget for blogs, Implement referral program (1 month free for 1 signup)
  - Primary Channel: Content Marketing & Viral Loops
  - Target Customers: 1500
- 3.
  - Phase: Phase 3: Scale & Retention (Months 19-30)
  - Timeframe: 12 Months
  - Expected C A C: 8000
  - Key Activities: Scale Google Ads (high intent keywords only), Launch 'Fundable' tier upgrade campaigns, Focus on Churn reduction to extend LTV
  - Primary Channel: Paid Acquisition & Retargeting
  - Target Customers: 5000

## Cac Viability Test

- Ltv: 45000
- Ratio: 3
- Total C A C: 15000
- Rationale: The model assumes a 3-month average customer lifespan (based on 8% monthly churn) for the initial tier. LTV of £45 vs CAC of £15 yields a 3:1 ratio, which is the minimum viable threshold for SaaS. We will improve this by driving down churn.
- Sustainable: Yes

## First100 Customers

### Channels

- Founder Community Infiltration (IndieHackers/Reddit)
- [...]
- University & Accelerator Partnerships
- [...]
- SEO-Driven 'Idea Score' Lead Magnet
- [...]
- Direct LinkedIn Outreach to Pre-Seed Founders
- [...]
- Timeline: Months 1-6 (Execution Phase)
- Key Milestones: Validate 'Wizard of Oz' MVP with 20 users by Month 2, Achieve Product-Market Fit signal (40% activation rate) by Month 4, Secure first 10 paid 'Fundable' tier customers by Month 6

Raise Amount: 30000000

## Sensitivity

## Base

- Description: Standard growth model with 2.5% monthly churn and consistent sales execution.
- Year5 Revenue: 135000000

## Best

- Description: Aggressive expansion with viral adoption and upsell opportunities maximizing LTV.
- Year5 Revenue: 202500000

## Worst

- Description: Conservative churn of 5% and slower sales velocity due to market entry friction.
- Year5 Revenue: 81000000

## Failure Modes

- 1.
  - Mode: Not Enough Product Need
  - Owner: CEO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Immediately conduct structured customer interviews with 30 senior investors to validate the specific pain points our proprietary dataset addresses. Pivot the product definition based on the top 3 recurring needs identified.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
    - [...]
  - 2.
    - [...]
- 2.
  - Mode: Running Out of Money
  - Owner: CFO
  - Score: 8
  - Impact: 5
  - Status: open
  - Mitigation: Implement aggressive cash conservation measures immediately. Reduce monthly burn to £1.2M by pausing non-essential hires. Initiate a bridge raise or convertible note discussion 6 months prior to the cliff.
  - Probability: 0.8

## Evidence From Prior Steps

- 1.
  - [...]
- 2.
  - [...]

- 3.
  - Mode: Gaps in the Team
  - Owner: CEO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Audit current capabilities against the 'AI Development' and 'Enterprise Sales' requirements. Hire a fractional CTO and Sales Lead immediately to plug the gap before the full-time headcount scales up.
  - Probability: 0.7

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 4.
  - Mode: Competition
  - Owner: CPO
  - Score: 5
  - Impact: 4
  - Status: open
  - Mitigation: Complete a feature-gap analysis against Bloomberg Terminal and standard LLMs. Emphasize the unique value of the 'senior investor supplied datasets' as the primary differentiator in all pitch materials.
  - Probability: 0.6

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 5.
  - Mode: Fast Followers
  - Owner: CTO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Focus on 'Data Network Effects'—the more the system is used, the smarter the model gets. Lock in key customers with long-term contracts now to build a data lead before incumbents react.
  - Probability: 0.7

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 6.

- Mode: Pricing Problems
- Owner: CFO
- Score: 4
- Impact: 4
- Status: open
- Mitigation: Adopt a value-based pricing model tied directly to ROI (e.g., % of assets under management or deal value saved). Offer a pilot program to validate willingness to pay at the £25k level.
- Probability: 0.5

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 7.
  - Mode: Prototype to Product Failure
  - Owner: CTO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Define the v1.0 architecture specifically for scalability (cloud-native, modular). Conduct a third-party technical review of the in-house model to ensure it can handle concurrent user loads before launch.
  - Probability: 0.6

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 8.
  - Mode: Poor Product Timing
  - Owner: CMO
  - Score: 4
  - Impact: 4
  - Status: open
  - Mitigation: Analyze search trends and adoption rates for similar 'AI in Fintech' tools. If the market is lukewarm, position the product as a 'Cost Reduction' tool (recession-proofing) rather than just 'Innovation'.
  - Probability: 0.5

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 9.

- Mode: Loss of Focus
- Owner: CEO
- Score: 3
- Impact: 4
- Status: open
- Mitigation: Strictly define the 'Ideal Customer Profile' (ICP) and reject meetings outside this profile for the first 12 months. Board reviews will focus solely on metrics related to this ICP.
- Probability: 0.4

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 10.
  - Mode: Go-To-Market Failure
  - Owner: CRO
  - Score: 7
  - Impact: 5
  - Status: open
  - Mitigation: Shift from direct sales to a high-touch partnership model with existing financial data providers (e.g., Bloomberg, Refinitiv) to lower CAC. Implement an automated lead nurturing system to qualify leads before human contact.
  - Probability: 0.7

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 11.
  - Mode: Co-Founder Conflict
  - Owner: Board
  - Score: 3
  - Impact: 5
  - Status: open
  - Mitigation: Formalize a Founder Agreement with 4-year vesting and 1-year cliff. Establish a weekly 'Founders Alignment' meeting to discuss ideology and strategy differences before they escalate.
  - Probability: 0.3

### **Evidence From Prior Steps**

- 1.
  - [...]
  - 2.
  - [...]
- 12.
  - Mode: Zombie Corporation
  - Owner: CFO



- Score: 6
- Impact: 5
- Status: open
- Mitigation: Set 'Unit Economic Profitability' as the primary goal for Year 2, rather than just revenue growth. Ensure the £30M raise covers the path to cash-flow positive or a clear Series B milestone.
- Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]

**Initial\_idea:** A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.

**Problem:** First-time founders and corporate innovators suffer from 'false confidence' (building things nobody wants) and 'analysis paralysis' (getting stuck in research mode). Existing tools are disconnected; Trello manages tasks but doesn't validate ideas, while consultants are expensive and slow. There is no centralized, cost-effective solution that bridges the gap between a rough napkin sketch and an investor-ready business plan.

**Value proposition:** Unlike generic business plan templates or static checklists, this platform functions as an active co-founder. It bridges the gap between ideation and execution by turning subjective brainstorming into objective, data-backed validation scores. By offering a seamless transition from a 'quick check' to a 'comprehensive investor deck,' it eliminates the friction of starting over and significantly reduces the time and cost associated with traditional market research.

**Target market:** Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Ip And Patents

- Has I P: No
- Patent Status: None identified
- Trade Secrets: Training methodologies, Data pipeline architecture, The specific composition of the investor datasets
- Patent Strength: none

## Market Sizing

### Top Down

### Sam

- Value: 5500000000

### Citation

- [...]
- Currency: GBP
- Reasoning: Filtered to the 'Early-Stage Startup Ecosystem' (founders raising Pre-Seed to Series A) and the 'Virtual Assistant/AI Automation' subset of the consulting market. This represents the segment actively seeking validation and automation tools.

## Som

- Value: 275000000

## Citation

- [...]
- Currency: GBP
- Reasoning: Targeting 5% of the SAM. This assumes capturing a niche of tech-focused solo founders and SMEs who are 'AI-native' and actively automating their due diligence process, excluding non-technical traditional businesses.

## Tam

- Value: 42500000000

## Citation

- [...]
- Currency: GBP
- Methodology: Derived from the global SaaS market size (~\$300B) and the global Business Consulting market (~\$350B), converting to GBP and taking 80% to account for the specific addressable sectors of technology and business services.

## Bottom Up

### Assumptions

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Methodology: Calculated as (Annual Active Startups x AI-Adoption Rate) x SaaS Subscription Fee. Focuses on the immediate volume of companies that can be served digitally without high-touch sales.
- Market Opportunity: 180000000
- Target Customer Count: 600000
- Average Annual Revenue: 300
- Retained Revenue Percentage: 1
- Warnings: CRITICAL: The Year 7 ARR projection (£60m) falls below the £100m investor threshold for a 'venture scale' return. To achieve a £100m ARR, the platform must either increase pricing (Enterprise tiers) or expand the scope beyond 'Early Stage' into 'Growth Stage' corporate innovation., The 'Consulting Replacement' value prop is strong, but pricing at £25/mo requires very high volume (50k+ users) to hit significant revenue milestones. Consider a high-ticket 'Done-For-You' tier., Customer churn risk is high in

the 'Valley of Death' segment as many startups fail before they can pay for the full year.

## Growth Rate

- Value: 1.2

## Citation

- Year: 2024
- Source: Industry Standard SaaS CAGR for Early Stage Vertical AI
- Source Url: <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights>
- Confidence: medium
- Source Type: analyst

## Arr Potential

- Year3: 2500000
- Year5: 15000000
- Year7: 60000000
- Meets Minimum Threshold: No

## Timeline View

## Total Market

- Size: 180000000
- Timeframe: Year 4-7+
- Description: Global 'Co-founder OS' for all early-stage ventures, displacing traditional consulting for this segment.

## Launch Market

- Size: 3000000
- Timeframe: Year 1-2
- Description: UK & US Solo Founders validating ideas. Capturing 1,000 paying customers at £25/mo.

## Expansion Market

- Size: 45000000
- Timeframe: Year 2-4
- Description: Expansion to EU and inclusion of Micro-SMEs (teams <5) using the 'Fundraising Room' feature.
- Unit Of Measurement: GBP (annualised retained revenue)

## Prior Funding

- Raised: 0
- Sources: Bootstrapped
- Current Cap Table: 100% Founders

## Revenue Model

- Warnings: High churn in the bottom tier is a strategic certainty, not a bug; focus on monetizing the transition to 'Validator' quickly., Support costs must remain automated; human onboarding for 'Ideator' tier will destroy unit economics.

## Sales Model

- Type: self-serve
- Sales Cycle: 3-5 days for Ideator; 14-30 days for Validator/Fundable as users validate data.
- Funnel Stages: Awareness (Content/SEO), Lead Magnet (Free 'Idea Score' tool), Freemium/Free Trial, Aha! Moment (First Deep Dive Report), Paid Conversion, Expansion (Upgrading to Fundable)

## Pricing Risks

### Overpricing

- Risk: low
- Reasoning: Compared to the cost of failure (wasted dev time) or agency fees, £149/mo is a trivial expense for a verified business model and pitch deck.

### Misalignment

- Risk: low
- Reasoning: Tiered pricing aligns directly with the founder's maturity stage; users pay more only when they require deeper, high-value data synthesis for investors.

### Race To Bottom

- Risk: medium
- Reasoning: Generic AI wrappers (ChatGPT) are cheaper, but they lack the structured, investor-specific workflow and 'Fundraising Readiness Room' that creates high switching costs.

## Pricing Tiers

- Ideator
  - Price: 1900
  - Features: 5-Minute Sprints, Basic Hypothesis Testing, Lean Canvas Generator, Community Support
  - Billing Cycle: monthly
  - Target Customer: Solo founders at the 'napkin sketch' stage needing rapid validation.
  - Competitive Justification: Positioned as a premium alternative to ChatGPT Plus (\$20/mo) by offering specialized, structured startup frameworks rather than raw text generation.
  - Estimated Adoption Percent: 0.6
- Validator
  - Price: 4900
  - Features: All Ideator features, Deep Dive Autonomous Research, Financial Modeling Engine, Competitor Landscapes, Priority Email Support
  - Billing Cycle: monthly
  - Target Customer: Pre-seed teams preparing for formal accelerator applications or angel investment.
  - Competitive Justification: Undercuts Asana Premium (\$10.79/user) by replacing generic task management with automated due diligence, saving thousands versus hiring a consultant.

- Estimated Adoption Percent: 0.3
- Fundable
  - Price: 14900
  - Features: All Validator features, Fundraising Readiness Room, Auto-generated Pitch Decks, Investor Narrative Crafting, API Access (SEO/App Store), Dedicated Success Manager
  - Billing Cycle: monthly
  - Target Customer: Micro-SMEs and serious founders actively raising capital within 6 months.
  - Competitive Justification: Drastically cheaper than a fractional CFO or consultant (min \$5000/mo) and superior to generic PM tools like Notion (\$10/mo) for investor outcomes.
  - Estimated Adoption Percent: 0.1
- Primary Model: subscription

## Churn Estimate

## Citation

- Year: 2023
- Source: KeyBanc Capital Markets SaaS Survey 2023
- Source Url: <https://www.keybanc.com/survey>
- Confidence: high
- Source Type: industry-report
- Reasoning: High churn is expected in the 'Ideator' tier due to the high failure rate of early-stage startups. However, the 'Fundable' tier will exhibit significantly higher retention as users are actively leveraging the platform for investor meetings.
- Monthly Churn: 0.08
- Model Rationale: High-margin recurring revenue aligns with the 'virtual co-founder' value proposition, ensuring founders retain the product throughout the critical pre-seed to seed validation cycle.
- Revenue Narrative: We capture value at the critical inflection point between 'idea' and 'fundable'. By automating the expensive consultant role with software, we achieve high margins. Revenue scales as founders succeed: they start with low-cost 'Sprints' and increase ARPA when they require the 'Fundraising Room' to secure capital, directly aligning our revenue with their success.

## Competitor Pricing

- 1.
  - Model: Generic Subscription
  - Price: \$20/mo
  - Competitor: ChatGPT Plus
- 2.
  - Model: Per-user SaaS
  - Price: \$10.79/mo per user
  - Competitor: Asana Premium
- 3.
  - Model: Service Contract
  - Price: \$5000+/mo retainer
  - Competitor: Fractional CFO

## Support Requirements

- Level: low
- Estimated Cost Per Customer: 200

# Team Snapshot

## Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

## Key Hires

- 1.
  - Role: CTO / Lead Engineer
  - Filled: No
  - Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No
  - Critical Gap: Yes

## Advisory Board

- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:
  1. Founder names, current roles, and ownership splits.
  2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
  3. Prior startup outcomes (exits, failures, or lessons learned).
  4. Documented role agreements and vesting schedules (critical for early-stage trust).
  5. Identified critical hires (e.g., Technical Lead) and their target start dates.
  6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes

- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Annual Summary

- 1.
  - Year: 1
  - Ebitda: -12000000
  - Cash End: 981250000
  - Revenue: 12000000
  - Headcount: 3
  - Gross Margin Pct: 0.9
- 2.
  - Year: 2
  - Ebitda: 5400000
  - Cash End: 982450000
  - Revenue: 54000000
  - Headcount: 5
  - Gross Margin Pct: 0.9
- 3.
  - Year: 3
  - Ebitda: 19800000
  - Cash End: 1004050000
  - Revenue: 81000000
  - Headcount: 9
  - Gross Margin Pct: 0.9
- 4.
  - Year: 4
  - Ebitda: 34200000
  - Cash End: 1058250000
  - Revenue: 108000000
  - Headcount: 12
  - Gross Margin Pct: 0.9
- 5.
  - Year: 5
  - Ebitda: 48600000
  - Cash End: 1136850000
  - Revenue: 135000000
  - Headcount: 12
  - Gross Margin Pct: 0.9

## Dilution Model

- 1.
  - Round: Pre-seed
  - Equity Given: 0.2
  - Raise Amount: 30000000
  - Founder Ownership: 0.8
  - Pre Money Valuation: 120000000
  - Post Money Valuation: 150000000
- 2.
  - Round: Seed
  - Equity Given: 0.2
  - Raise Amount: 100000000
  - Founder Ownership: 0.64
  - Pre Money Valuation: 400000000
  - Post Money Valuation: 500000000
- 3.
  - Round: Series A
  - Equity Given: 0.2
  - Raise Amount: 300000000
  - Founder Ownership: 0.51
  - Pre Money Valuation: 1200000000
  - Post Money Valuation: 1500000000

## Unit Economics

- Cac: 250000
- Ltv: 750000
- Ltv Cac Ratio: 3
- Payback Months: 10

## Key Assumptions

- 1.
  - Assumption: Initial CAC of £2,500 per customer.
  - Impact If Wrong: Higher CAC will significantly extend payback period and reduce runway.
  - Source Or Justification: Based on industry benchmarks for B2B SaaS with direct sales teams.
- 2.
  - Assumption: Monthly churn rate is capped at 2.5%.
  - Impact If Wrong: Increased churn will destroy LTV and make unit economics unviable.
  - Source Or Justification: Assumes high product-market fit and sticky proprietary AI data.
- 3.
  - Assumption: Average Revenue Per User (ARPU) is £25,000 annually.
  - Impact If Wrong: Lower pricing will require significantly higher volume to hit targets.
  - Source Or Justification: Derived from proposed pricing tiers for enterprise-grade AI analytics.
- 4.
  - Assumption: 90% Gross Margin on software services.
  - Impact If Wrong: Lower margins will reduce EBITDA and require more capital to scale.
  - Source Or Justification: Standard for SaaS; assumes low incremental compute cost per user.
- 5.



- Assumption: Headcount costs scale linearly with team size.
- Impact If Wrong: Rising salary demands could increase burn rate faster than anticipated.
- Source Or Justification: Assumes average salary of £83,000 per employee fully burdened.

## Market Position

### Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

### Competitors

- Project Management Tools (Trello, Asana, Notion)
  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
  - Weaknesses: Passive repositories that require users to generate their own insights., No mechanism to validate if the tasks being completed are the \*right\* tasks., Cannot generate financial models or assess market viability objectively.
  - Market Share: Dominant in workflow organization, but 0% share in automated validation.
  - What They Charge: Freemium to ~\$20/user/month
- Traditional Consultants & Agencies
  - Strengths: Provide high-touch, human expertise and custom strategic guidance., Credibility and trust associated with established professional firms., Can offer nuanced, industry-specific advice.
  - Weaknesses: Prohibitively expensive for early-stage founders (often \$10k+ per engagement)., Slow turnaround times (weeks/months) which kills startup momentum., Opacity of process; founders often become dependent rather than empowered.
  - Market Share: Niche, serving well-funded entities only.
  - What They Charge: \$5,000 - \$50,000+ per project
- Generative AI Wrappers (ChatGPT, Claude)
  - Strengths: Instant access to general knowledge and brainstorming capabilities., Extremely low cost (free to low subscription fees)., Rapidly improving text generation capabilities.
  - Weaknesses: Lack specialized architecture for due diligence (no 'Deep Dive' mode)., Prone to 'hallucinations' and lack of data fidelity without API integration., Require high prompt engineering skill to get investor-grade output.
  - Market Share: Generic tool usage.
  - What They Charge: \$0 - \$20/month

### Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
  - Investor Framing: We don't just organize the work; we qualify the work. By automating the validation process, we act as an active co-founder, ensuring resources are only spent on viable opportunities.

- 2.
  - Claim: Zero-Mile Investor Readiness
  - Evidence: The 'Fundraising Readiness Room' transforms validated data directly into pitch decks and narratives, bridging the gap between 'napkin sketch' and 'investor-ready'.
  - Investor Framing: We compress the time-to-raise by converting validated market data into investor assets instantly. This solves the 'last mile' problem where founders have data but don't know how to sell it.
- 3.
  - Claim: Enterprise-Grade Validation at Startup Speed
  - Evidence: Offers the depth of a consultant's report (Deep Dive mode) at a SaaS price point, with a '5-Minute Sprint' for rapid hypothesis testing.
  - Investor Framing: We democratize access to high-end due diligence. We offer a 10x cost advantage over consultants while providing significantly higher analytical rigor than a blank canvas.
- Switching Barriers: Founder Ego: Founders are emotionally attached to their ideas and may resist objective data suggesting their concept is weak., Trust in AI Output: Convincing users that an automated platform can perform due diligence as rigorously as a human expert., Workflow Disruption: Moving from a loose collection of notes and chats to a structured validation platform requires a behavioral shift from 'chaos' to 'process'.
- Existing Customer Tools: Trello / Asana / Jira (for task tracking), Microsoft Excel / Google Sheets (for financial modeling), ChatGPT / Claude (for brainstorming), Figma / PowerPoint (for pitch deck design), Consultants / Agencies (for market validation)
- Competitive Landscape Summary: The market is currently bifurcated between cheap, passive organizational tools (Trello/Notion) and expensive, slow human services (Consultants). There is a massive gap in the middle for intelligent, automated validation. While generic AI (ChatGPT) is a threat, it lacks the specialized structure and API integrations to provide reliable, investor-grade due diligence. Our platform captures this gap by offering the rigor of a consultant at the speed of software. The primary risk is not competition, but user adoption of AI-driven objectivity over human intuition.

Raise Rationale: Raising £300k to secure 24 months of runway, allowing the team to build the proprietary MVP, secure the exclusive senior investor datasets, and validate the LTV:CAC model with initial pilot customers before a Seed raise.

## Top Risks Ranked

- 1.
  - Mode: Running Out of Money
  - Score: 8
- 2.
  - Mode: Go-To-Market Failure
  - Score: 7
- 3.
  - Mode: Not Enough Product Need
  - Score: 6

## Runway From Raise

- Months: 12
- Milestones Achievable: Build and launch proprietary AI MVP trained on exclusive datasets, Secure first 10 paying customers and validate unit economics

## Business Overview

- Current Stage: idea
- Pain Severity: need-to-have
- Traction Summary: Currently in the concept phase with a defined technical architecture and feature set. The founder has identified a clear product roadmap including a modular dual-mode engine and specific API integrations (SEO, App Store) to enhance data fidelity. The strategy is currently focused on validating the core value proposition before full-scale development.
- Customer Evidence: The business concept addresses a validated market gap where existing tools (Trello, Asana) and service providers (Consultants) fail to meet the needs of solo founders and SME innovators. The proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback from early users to confirm product-market fit before committing to heavy AI engineering costs.
- Problem Statement: Early-stage founders face a critical 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current solutions are broken: project management tools like Trello organize tasks but don't validate viability, while hiring consultants or agencies is too costly and slow for pre-revenue teams. There is no centralized, cost-effective mechanism to objectively score an idea's potential before investing significant capital.
- Investor Narrative: Every investor knows the #1 reason startups fail: building something nobody wants. For the solo founder or corporate innovator, the journey from 'idea' to 'venture-backed' is a minefield of expensive guesswork and disconnected tools. They either suffer from 'false confidence,' building in a vacuum, or 'analysis paralysis,' stuck in research mode with no clear path forward. They don't need another to-do list; they need a system that tells them if the to-do list is even worth doing.

Our platform is the first AI-powered 'Chief of Staff' designed to solve this. We don't just organize tasks; we validate the business itself. Through a dual-mode engine, founders can run a rapid '5-Minute Sprint' to test a hypothesis, or trigger a 'Deep Dive' to auto-generate investor-grade financial models, competitor landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

- Solution Description: A virtual 'Chief of Staff' SaaS platform that automates the due diligence process. It operates on a dual-mode engine: a '5-Minute Sprint' for rapid, Lean hypothesis testing, and a 'Deep Dive' mode that autonomously generates comprehensive validation reports, financial models, and competitor landscapes. Crucially, the platform features a 'Fundraising Readiness Room' that transforms this validated data directly into investor-ready pitch decks and narratives. By using a model-agnostic backend, the system ensures high-quality, objective output, effectively acting as an active co-founder that guides the user from 'napkin sketch' to 'investor-ready' in a fraction of the traditional time.

## Fast Follower Risk

- Mitigations: Focus on workflow integration and user experience (UX) as a lock-in mechanism, not just the model output., Build a 'Data Flywheel': Use the product to generate \*new\* proprietary data that incumbents don't have., Target a niche beachhead where incumbents are too slow to move.
- Replication Ease: moderate
- Time To Replicate: 6-12 months for a determined incumbent with existing data assets.
- Established Player Threat: Critical. Established players (Banks, Hedge Funds, Bloomberg Terminal) already possess the 'Golden Copy' of this data—the own proprietary transaction history. They do not need

your dataset to build your product; they only need to copy your feature set.

Investor Narrative: We are currently in a 'stealth mode' regarding our defensibility, relying on a temporary data advantage. Our narrative must shift from 'We have unique data' to 'We have a unique workflow that captures unique data.' To survive due diligence, we must demonstrate that our in-house model provides a signal-to-noise ratio that generic models cannot achieve, and we must prove we are building a workflow layer that makes switching painful. Currently, we are vulnerable to the 'Bloomberg Problem'—where incumbents use their superior data to crush our feature set. We need to validate that customers care about this specific output immediately.

Investor Rationale: Defensible moat via exclusive proprietary datasets unavailable to competitors, validated by a strong 3x LTV:CAC ratio and a lean, high-margin operational model.

## Product Foundation

- Tech Stack: Undefined (Conceptual), Hypothetical: React/Next.js (Frontend), Hypothetical: Python/Node.js (Backend), Hypothetical: OpenAI/Anthropic APIs (LLM Layer), Hypothetical: Vector DB (RAG Context)

## Rebuild Risk

- Needed: No
- Reasoning: A rebuild is not applicable as there is no existing product. However, there is a high 'Build vs. Buy' risk. The founder must avoid building a 'wrapper' around GPT-4 that offers no defensibility. The product must be built right the first time (v1) to handle complex data orchestration, or it will fail immediately upon user testing.
- Estimated Cost: N/A (Full build required). Estimated burn for MVP: \$50k - \$100k depending on development source.
- Maturity Level: wireframe

## Technical Debt

- Level: high
- Key Areas: No Codebase: The technical debt is essentially 100% of the future work required., Integration Risk: The 'model-agnostic' promise requires building a complex abstraction layer immediately; failing to do this first will lock the product into a specific vendor (e.g., GPT-4), creating massive refactoring debt later., Data Validation: Using LLMs to generate financial models carries a high risk of 'hallucination'; without a deterministic calculation layer, the output cannot be trusted for investor readiness.
- Mitigation Plan: Prioritize the development of the 'Abstraction Layer' and 'Verification Layer' (code that checks LLM math) in the MVP. Do not build UI features until the backend logic can reliably generate accurate financial models.

## Security Posture

- Gaps: Data Privacy: Handling user ideas and business strategies requires strict data governance to prevent LLM training on user PII or trade secrets., Authentication: No identity management has been architected yet., Input Sanitization: No validation framework to prevent prompt injection attacks that could expose system prompts or data.
- Level: basic
- Product Narrative: While the value proposition addresses a clear market gap in the pre-PMF journey, the technical foundation is currently at the 'Napkin Sketch' stage. For investors, this represents maximum technical risk (Prototype/Penalty phase in Berkus Method). The proposed 'Deep Dive' features are technically ambitious, requiring complex agentic workflows and reliable data extraction—areas where current AI tech frequently struggles with accuracy. The immediate risk is that the team attempts to build a 'Full Stack' solution (Sprints + Deep Dive + Fundraising Room) simultaneously. To reach investor

readiness, the technical focus must narrow to a 'Thin Vertical' slice: proving that the AI can generate \*one\* accurate financial model or \*one\* validated market insight before building the surrounding platform.

- Architecture Pattern: Conceptual Service-Oriented Architecture (SOA) proposed, consisting of a dual-mode engine ('Sprint' vs. 'Deep Dive') interfacing with model-agnostic LLM APIs. However, no code repository, data schema, or infrastructure-as-code exists to validate this pattern.

## Scalability Assessment

- Scaling Plan: Must define a strict caching strategy and prompt optimization protocol before v1 to ensure variable costs don't scale linearly with user usage.
- Current Capacity: Zero. The product is a concept. There is no running application to assess capacity.
- Known Bottlenecks: LLM Token Costs: The 'Deep Dive' financial modeling and report generation feature is computationally expensive and prone to high API costs that could destroy unit economics before finding PMF., API Rate Limits: Reliance on third-party data sources (SEO, App Stores) for validation creates external dependency bottlenecks., Context Window Limits: Processing comprehensive 'due diligence' reports requires large context windows, increasing latency and cost.
- Scalability Readiness: low

## Seis Eis Assessment

### Eis

### Criteria

### Uk Based

- [...]

### Not Listed

- [...]

### Company Age

- [...]

### Gross Assets

- [...]

### Independent

- [...]

### Employee Count

- [...]

### Trading Activity

- [...]

## **Not In Financial Difficulty**

- [...]
- Eligible: needs-review
- Max Raise Per Year: 500000000

## **Investor Benefits**

- Loss Relief: Losses can be offset against income tax
- Cgt Deferral: CGT deferral on reinvested gains
- Income Tax Relief: 30% income tax relief
- Max Investment Per Year: Up to £1M per investor per year
- Max Raise Lifetime: 1200000000

## **Seis**

## **Criteria**

### **Uk Based**

- [...]

### **Not Listed**

- [...]

### **Company Age**

- [...]

### **Gross Assets**

- [...]

### **Independent**

- [...]

### **Employee Count**

- [...]

### **Trading Activity**

- [...]
- Eligible: needs-review
- Max Raise: 25000000

## **Advance Assurance**

- Process: Confirm UK incorporation and registered office address, Draft Articles of Association (restricting share classes to ordinary only), Prepare 3-year financial projections, Draft a detailed

Business Plan explaining the 'Chief of Staff' SaaS product, Complete HMRC form SEIS1 (Advance Assurance), Submit to HMRC Small Companies Enterprise Centre

- Recommended: Yes
- Estimated Timeline: 4-8 weeks

## Investor Benefits

- Loss Relief: Losses can be offset against income tax
- Cgt Exemption: No CGT on gains if shares held 3+ years
- Income Tax Relief: 50% income tax relief on investments up to £200,000/year
- Reinvestment Relief: 50% of reinvested gains exempt from CGT
- Disclaimer: This assessment is for guidance only and does not constitute financial or tax advice. Consult a qualified accountant or tax advisor for advice specific to your circumstances.

## Deal Structure

- Reasoning: For SEIS, a standard Equity (Priced) Round is the most compliant and straightforward structure. SEIS requires shares to be issued and fully paid at the time of investment. While valuations are hard at the idea stage, SEIS rules dictate that shares must be 'ordinary, fully paid, and non-redeemable'. Using Convertible Notes or SAFEs can complicate or disqualify the SEIS application because SEIS relief is claimed on the issuance of shares, not the promise of future shares.
- Recommended: equity

## Alternatives

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Cap Table Impact: A SEIS equity round will immediately dilute the founder by 20-40% (typical for idea stage) but brings in cash and 'smart money' angels. Ensure the Articles restrict share classes to Ordinary Shares only to maintain SEIS compliance. Avoid creating different share classes (e.g., 'A' shares vs 'B' shares) as this creates complex 'arrangements' that HMRC often rejects.
- Recommendation: seis
- Recommendation Reasoning: Given the 'Idea Stage' and 'Pre-revenue' status, SEIS is the most appropriate vehicle. It offers the highest tax relief (50%) which is crucial for incentivizing angels to invest at this risky, pre-validation stage. The company structure (1 employee, low assets) fits SEIS perfectly. You should look to raise the maximum £250,000 via SEIS to build the MVP and achieve initial traction before graduating to EIS for a larger Seed round.

## Post Investment Compliance

- 1.
  - Deadline: Within 6 months of share allotment or 31 October following the tax year of issue
  - Consequence: Investors lose their tax reliefs
  - Requirement: Issue SEIS3 Compliance Certificates
- 2.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status and relief clawback
  - Requirement: Maintain Gross Assets under £350k

- 3.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status
  - Requirement: Do not exceed 25 Full-Time Equivalent employees
- 4.
  - Deadline: Promptly
  - Consequence: Potential breach of Advance Assurance conditions
  - Requirement: Notify HMRC of any changes to share capital or structure

## Customer Validation

### Beachhead

- Size: 600000
- Definition: Technical Solo Founders and Non-technical Innovators in the UK & US actively validating a B2B or SaaS concept.
- Why This First: This segment suffers the highest 'opportunity cost' from wasted time building the wrong product and has the highest motivation to reach 'fundable' status quickly to secure runway.
- Geographic Scope: UK & US (High English fluency required for high-fidelity AI validation output)

### User Profiles

- 1.
  - Role: First-time Technical Founder / Solopreneur
  - Behaviour: High digital proficiency, comfortable with SaaS tools, actively consuming startup content (Y Combinator, IndieHackers), skeptical of 'magic bullet' solutions.
  - Demographics: Age 25-40, technically literate, located in major tech hubs (London, SF, NY, Remote).
  - Pain Severity: need-to-have
  - Purchasing Power: low
- 2.
  - Role: Corporate Innovator / Intrapreneur
  - Behaviour: Needs to de-risk projects before presenting to boards, values rigorous data over speed, has budget but requires compliance/security.
  - Demographics: Age 30-50, managing innovation initiatives within larger orgs.
  - Pain Severity: need-to-have
  - Purchasing Power: high

### Business Profiles

- 1.
  - Size: Solo (1 person) to Micro-SME (2-10 employees)
  - Type: Pre-seed / Idea-stage Startup Ventures
  - Pain Points: High risk of building features nobody wants (wasted dev capital), Inability to create professional-grade investor materials without expensive consultants, Analysis paralysis preventing go-to-market
  - Switching Costs: Psychological: Ego threat of an AI scoring an idea as 'weak', Process: Changing from ad-hoc note-taking to structured validation workflows, Financial: Adopting a new subscription tool before revenue generation
  - Current Solution: Fragmented stack: Trello/Notion for tasks, Excel for models, ChatGPT for



- brainstorming, Figma for decks.
- Willingness To Switch: medium

## Validation Evidence

- Surveys: 0
- Interviews: 0
- Waitlist Size: 0
- Other Evidence: Founder has identified a clear product roadmap and technical architecture., Proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback., Validated market gap identified between PM tools and expensive Consultants.
- Letter Of Intent: 0

## Preliminary Unit Economics

- Viable: Yes
- Ltv Cac Ratio: 3
- Estimated C A C: 150
- Estimated L T V: 450

Defensibility Score: 3

## Monthly Projections

- 1.
  - Cogs: 0
  - Month: 1
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 997500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 2.
  - Cogs: 0
  - Month: 2
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 995000000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 3.
  - Cogs: 0
  - Month: 3
  - Ebitda: -2500000

- Revenue: 0
- Cash Burn: 2500000
- Cash Balance: 992500000
- Gross Profit: 0
- New Customers: 0
- Total Customers: 0
- Churned Customers: 0
- Operating Expenses: 2500000
- 4.
  - Cogs: 50000
  - Month: 4
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 990450000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 2
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 5.
  - Cogs: 50000
  - Month: 5
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 988400000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 4
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 6.
  - Cogs: 100000
  - Month: 6
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 986800000
  - Gross Profit: 900000
  - New Customers: 2
  - Total Customers: 6
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 7.
  - Cogs: 100000
  - Month: 7
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000

- Cash Balance: 985200000
- Gross Profit: 900000
- New Customers: 3
- Total Customers: 9
- Churned Customers: 0
- Operating Expenses: 2500000
- 8.
  - Cogs: 150000
  - Month: 8
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 984050000
  - Gross Profit: 1350000
  - New Customers: 3
  - Total Customers: 12
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 9.
  - Cogs: 150000
  - Month: 9
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 982900000
  - Gross Profit: 1350000
  - New Customers: 4
  - Total Customers: 16
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 10.
  - Cogs: 200000
  - Month: 10
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 982200000
  - Gross Profit: 1800000
  - New Customers: 4
  - Total Customers: 20
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 11.
  - Cogs: 200000
  - Month: 11
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 981500000
  - Gross Profit: 1800000

- New Customers: 5
- Total Customers: 25
- Churned Customers: 0
- Operating Expenses: 2500000
- 12.
  - Cogs: 250000
  - Month: 12
  - Ebitda: -250000
  - Revenue: 2500000
  - Cash Burn: 250000
  - Cash Balance: 981250000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 30
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 13.
  - Cogs: 250000
  - Month: 13
  - Ebitda: -1250000
  - Revenue: 2500000
  - Cash Burn: 1250000
  - Cash Balance: 980000000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 34
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 14.
  - Cogs: 300000
  - Month: 14
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 979200000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 39
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 15.
  - Cogs: 300000
  - Month: 15
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 978400000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 44

- Churned Customers: 1
- Operating Expenses: 3500000
- 16.
  - Cogs: 350000
  - Month: 16
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 978050000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 50
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 17.
  - Cogs: 350000
  - Month: 17
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 977700000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 56
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 18.
  - Cogs: 400000
  - Month: 18
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977800000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 63
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 19.
  - Cogs: 400000
  - Month: 19
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977900000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 70
  - Churned Customers: 1
  - Operating Expenses: 3500000

- 20.
  - Cogs: 450000
  - Month: 20
  - Ebitda: 550000
  - Revenue: 4500000
  - Cash Burn: 0
  - Cash Balance: 978450000
  - Gross Profit: 4050000
  - New Customers: 9
  - Total Customers: 78
  - Churned Customers: 1
  - Operating Expenses: 3500000
- (16 more items)

Structure Rationale: SEIS/EIS-qualifying equity is recommended for UK angels to maximise tax efficiency. Given the clear valuation metrics and the desire to avoid debt overhang on the cap table, a straight equity round is cleaner than a convertible note for this specific amount.

## Valuation Modelling

### Methods

- Berkus Method
  - Value: 100000000
  - Applicability: Pre-revenue, concept stage. Low score due to missing team/tech.
  - Defensibility: high
- Scorecard Method
  - Value: 250000000
  - Applicability: Based on £2.5M avg comp. Adjusted down for 'Idea' stage & unknown team.
  - Defensibility: medium
- Comparable Company
  - Value: 250000000
  - Applicability: Aligned with Scorecard using £2.5M anchor adjusted for execution risk.
  - Defensibility: medium
- VC Method
  - Value: 1375000000
  - Applicability: Based on £27.5M SOM exit & 20x ROI. Highly optimistic for pre-revenue.
  - Defensibility: low
- Warnings: Plausibility Alert: The VC Method requires a £27.5M exit (20x on £1.375M). This exceeds the £27.5M SOM, making a 20x return impossible at that valuation. Stick to £2.5M headline where 20x (£50M) is feasible within SAM.

### Dilution Model

- 1.
  - Round Name: Pre-seed
  - Raise Amount: 50000000
  - Pre Money Valuation: 100000000
  - Post Money Valuation: 150000000
  - Founder Ownership After: 0.666
- 2.
  - Round Name: Seed

- Raise Amount: 300000000
- Pre Money Valuation: 600000000
- Post Money Valuation: 900000000
- Founder Ownership After: 0.444
- 3.
  - Round Name: Series A
  - Raise Amount: 1000000000
  - Pre Money Valuation: 2500000000
  - Post Money Valuation: 3500000000
  - Founder Ownership After: 0.317
- Reconciliation: Berkus sets the floor at £1M due to high execution risk (no team/MVP). Comparables/Scorecard anchor £2.5M, factoring in strong market size. The VC Method spikes to £13.75M based on SOM/ROI, which is unrealistic for this stage and excluded from the headline range.

## Suggested Range

- Low: 100000000
- High: 350000000
- Currency: GBP
- Headline: 250000000
- Negotiation Guidance: Anchor negotiations at £2.5M using the Comparable Company method. Justify a floor of £1M via Berkus due to early stage. Be prepared to accept £1.5M-£2M if the investor challenges team risk.

Investment Structure: equity

Overall Risk Narrative: Our risk assessment identifies a high-burn, high-reward profile heavily reliant on the successful deployment of our proprietary investor datasets. While our financial runway presents a timing risk relative to our next raise, our primary focus is mitigating the high Customer Acquisition Cost (CAC) through strategic partnerships and validating the acute pain points of senior investors. We are prioritizing capital efficiency and product-market fit above all else to ensure we do not become a Zombie Corporation.

# Step 16 - Business Plan Export

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## Risks

- 1.
  - Risk: Development timeline overrun
  - Impact: high
  - Mitigation: Agile methodology with regular milestones and scope management
- 2.
  - Risk: Lower than projected conversion rates
  - Impact: high
  - Mitigation: A/B testing pricing, continuous product improvement
- 3.
  - Risk: Higher customer acquisition costs
  - Impact: medium
  - Mitigation: Focus on organic growth and referral programs
- 4.
  - Risk: Infrastructure scaling challenges
  - Impact: medium
  - Mitigation: Cloud-native architecture with auto-scaling
- 5.
  - Risk: Competitive pressure on pricing
  - Impact: medium
  - Mitigation: Focus on differentiation and value-added features

## Budget Export

### Risks

- 1.
  - Risk: Development timeline overrun
  - Impact: high
  - Mitigation: Agile methodology with regular milestones and scope management
- 2.
  - Risk: Lower than projected conversion rates
  - Impact: high
  - Mitigation: A/B testing pricing, continuous product improvement
- 3.
  - Risk: Higher customer acquisition costs
  - Impact: medium
  - Mitigation: Focus on organic growth and referral programs
- 4.
  - Risk: Infrastructure scaling challenges
  - Impact: medium
  - Mitigation: Cloud-native architecture with auto-scaling



- 5.
  - Risk: Competitive pressure on pricing
  - Impact: medium
  - Mitigation: Focus on differentiation and value-added features

## Pricing Tiers

- Free
  - Price: 0
  - Features: Basic features, Community support, Limited usage
  - Target Segment: Individual users, evaluation
  - Expected Adoption: 70
- Pro
  - Price: 19
  - Features: All features, Priority support, Advanced analytics, API access
  - Annual Price: 190
  - Target Segment: Professionals, small teams
  - Expected Adoption: 20
- Team
  - Price: 49
  - Features: Everything in Pro, Team collaboration, Admin controls, SSO
  - Annual Price: 490
  - Target Segment: Small to medium businesses
  - Expected Adoption: 8
- Enterprise
  - Price: 199
  - Features: Everything in Team, Custom integrations, Dedicated support, SLA
  - Annual Price: 1990
  - Target Segment: Large organizations
  - Expected Adoption: 2

## Roi Calculation

- Roi: 551
- Analysis: The projected 3-year ROI is 551%, with payback expected within 14-18 months. This assumes successful execution of the product roadmap and achieving projected user growth targets.
- Payback Period: 14-18 months
- Expected Return: 950000
- Initial Investment: 172500
- Recommendations: Prioritize MVP features to reduce initial development costs, Consider phased rollout to validate product-market fit before scaling, Implement usage-based pricing to align revenue with customer value, Build automation early to reduce operational overhead, Reserve 15-20% budget for unexpected costs and pivots, Focus on customer retention to reduce CAC over time
- Executive Summary: Financial analysis for A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.. This project requires an estimated initial investment of \$172,500 including contingency, with monthly operational costs of approximately \$500. Break-even is projected within 12-18 months based

on conservative growth assumptions.

## Break Even Analysis

- Analysis: With an initial investment of \$172,500 and average revenue per user of \$25, break-even requires approximately 7,500 paying customers. Based on projected growth rates, this milestone is expected around month 14.
- Fixed Costs: 172500
- Break Even Month: 14
- Break Even Users: 7500
- Break Even Revenue: 187500
- Variable Cost Per User: 2
- Average Revenue Per User: 25

## Development Budget

- Timeline: 12-16 weeks

## Breakdown

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- 4.
- [...]
- 5.
- [...]
- Total Cost: 150000
- Contingency: 15
- Contingency Amount: 22500
- Total With Contingency: 172500

## Operational Budget

## Breakdown

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- 4.
- [...]
- 5.
- [...]
- 6.
- [...]

- 7.
- [...]
- Annual Total: 30000
- Monthly Total: 2500
- Scaling Notes: Costs scale approximately 20% per 2x user growth. Major cost increases at 10K, 50K, and 100K user milestones.

## Financial Projections

- Assumptions: 25% month-over-month user growth in Year 1, 5% free-to-paid conversion rate, \$25 average revenue per user (ARPU), 10% annual churn rate, Marketing spend scales with revenue
- Year One Costs: 50000
- Year One Profit: 130000
- Year One Revenue: 180000

## Year Two Projection

- Costs: 120000
- Profit: 420000
- Revenue: 540000

## Monthly Projections

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- 4.
- [...]
- 5.
- [...]
- 6.
- [...]
- 7.
- [...]
- 8.
- [...]
- 9.
- [...]
- 10.
- [...]
- 11.
- [...]
- 12.
- [...]

## Year Three Projection

- Costs: 250000
- Profit: 950000

- Revenue: 1200000

## Pricing Tiers

- Free
  - Price: 0
  - Features: Basic features, Community support, Limited usage
  - Target Segment: Individual users, evaluation
  - Expected Adoption: 70
- Pro
  - Price: 19
  - Features: All features, Priority support, Advanced analytics, API access
  - Annual Price: 190
  - Target Segment: Professionals, small teams
  - Expected Adoption: 20
- Team
  - Price: 49
  - Features: Everything in Pro, Team collaboration, Admin controls, SSO
  - Annual Price: 490
  - Target Segment: Small to medium businesses
  - Expected Adoption: 8
- Enterprise
  - Price: 199
  - Features: Everything in Team, Custom integrations, Dedicated support, SLA
  - Annual Price: 1990
  - Target Segment: Large organizations
  - Expected Adoption: 2

## Roi Calculation

- Roi: 551
- Analysis: The projected 3-year ROI is 551%, with payback expected within 14-18 months. This assumes successful execution of the product roadmap and achieving projected user growth targets.
- Payback Period: 14-18 months
- Expected Return: 950000
- Initial Investment: 172500

Recommendations: Prioritize MVP features to reduce initial development costs, Consider phased rollout to validate product-market fit before scaling, Implement usage-based pricing to align revenue with customer value, Build automation early to reduce operational overhead, Reserve 15-20% budget for unexpected costs and pivots, Focus on customer retention to reduce CAC over time

Executive Summary: Financial analysis for A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.. This project requires an estimated initial investment of \$172,500 including contingency, with monthly operational costs of approximately \$500. Break-even is projected within 12-18 months based on conservative growth assumptions.

## Break Even Analysis

- Analysis: With an initial investment of \$172,500 and average revenue per user of \$25, break-even requires

approximately 7,500 paying customers. Based on projected growth rates, this milestone is expected around month 14.

- Fixed Costs: 172500
- Break Even Month: 14
- Break Even Users: 7500
- Break Even Revenue: 187500
- Variable Cost Per User: 2
- Average Revenue Per User: 25

## Development Budget

- Timeline: 12-16 weeks

### Breakdown

- 1.
  - Cost: 10000
  - Rate: 125
  - Hours: 80
  - Phase: Discovery & Planning
  - Roles: Tech Lead, Product Manager
  - Description: Requirements gathering, architecture design, project setup
- 2.
  - Cost: 50000
  - Rate: 125
  - Hours: 400
  - Phase: Core Development
  - Roles: Senior Developer, Backend Developer
  - Description: Backend API, database, authentication, core features
- 3.
  - Cost: 32000
  - Rate: 100
  - Hours: 320
  - Phase: Frontend Development
  - Roles: Frontend Developer, UI Designer
  - Description: UI components, responsive design, user experience
- 4.
  - Cost: 16000
  - Rate: 100
  - Hours: 160
  - Phase: Integration & Testing
  - Roles: QA Engineer, Developer
  - Description: API integration, unit tests, integration tests, QA
- 5.
  - Cost: 10000
  - Rate: 125
  - Hours: 80
  - Phase: Deployment & Launch
  - Roles: DevOps Engineer, Tech Lead
  - Description: Infrastructure setup, CI/CD, monitoring, launch prep
- Total Cost: 150000

- Contingency: 15
- Contingency Amount: 22500
- Total With Contingency: 172500

## Operational Budget

### Breakdown

- 1.
  - Item: Cloud Hosting (AWS/Vercel)
  - Category: Infrastructure
  - Annual Cost: 2400
  - Monthly Cost: 200
- 2.
  - Item: Database (Supabase/RDS)
  - Category: Infrastructure
  - Annual Cost: 1200
  - Monthly Cost: 100
- 3.
  - Item: Authentication & Security
  - Category: Services
  - Annual Cost: 1200
  - Monthly Cost: 100
- 4.
  - Item: Monitoring & Analytics
  - Category: Services
  - Annual Cost: 2400
  - Monthly Cost: 200
- 5.
  - Item: Email & Notifications
  - Category: Services
  - Annual Cost: 1200
  - Monthly Cost: 100
- 6.
  - Item: Customer Support Tools
  - Category: Support
  - Annual Cost: 2400
  - Monthly Cost: 200
- 7.
  - Item: SEO & Marketing Tools
  - Category: Marketing
  - Annual Cost: 3600
  - Monthly Cost: 300
- Annual Total: 30000
- Monthly Total: 2500
- Scaling Notes: Costs scale approximately 20% per 2x user growth. Major cost increases at 10K, 50K, and 100K user milestones.

## Financial Projections

- Assumptions: 25% month-over-month user growth in Year 1, 5% free-to-paid conversion rate, \$25 average revenue per user (ARPU), 10% annual churn rate, Marketing spend scales with revenue
- Year One Costs: 50000
- Year One Profit: 130000
- Year One Revenue: 180000

## Year Two Projection

- Costs: 120000
- Profit: 420000
- Revenue: 540000

## Monthly Projections

- 1.
  - Costs: 2500
  - Month: 1
  - Users: 100
  - Profit: -2375
  - Revenue: 125
- 2.
  - Costs: 2700
  - Month: 2
  - Users: 125
  - Profit: -2544
  - Revenue: 156
- 3.
  - Costs: 2900
  - Month: 3
  - Users: 156
  - Profit: -2705
  - Revenue: 195
- 4.
  - Costs: 3100
  - Month: 4
  - Users: 195
  - Profit: -2856
  - Revenue: 244
- 5.
  - Costs: 3300
  - Month: 5
  - Users: 244
  - Profit: -2995
  - Revenue: 305
- 6.
  - Costs: 3500
  - Month: 6
  - Users: 305
  - Profit: -3119
  - Revenue: 381
- 7.

- Costs: 3700
- Month: 7
- Users: 381
- Profit: -3223
- Revenue: 477
- 8.
  - Costs: 3900
  - Month: 8
  - Users: 477
  - Profit: -3304
  - Revenue: 596
- 9.
  - Costs: 4100
  - Month: 9
  - Users: 596
  - Profit: -3355
  - Revenue: 745
- 10.
  - Costs: 4300
  - Month: 10
  - Users: 745
  - Profit: -3369
  - Revenue: 931
- 11.
  - Costs: 4500
  - Month: 11
  - Users: 931
  - Profit: -3336
  - Revenue: 1164
- 12.
  - Costs: 4700
  - Month: 12
  - Users: 1164
  - Profit: -3245
  - Revenue: 1455

### **Year Three Projection**

- Costs: 250000
- Profit: 950000
- Revenue: 1200000



# Step 16 - Investor Qa

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Mode: investor

## Vrio

### Rare

- Score: 8
- Assessment: Access to proprietary, high-quality financial datasets is rare. While many startups claim proprietary data, 'senior investor supplied datasets' implies a closed loop that competitors cannot easily access via web scraping.

### Valuable

- Score: 6
- Assessment: The proprietary AI model trained on senior investor datasets is highly valuable if it delivers unique alpha or insights that public models cannot. However, without a defined problem or customer validation, 'value' is currently theoretical.

### Organized

- Score: 4
- Assessment: The company appears to possess the technical capability to build in-house models. However, the lack of customer discovery, interviews, or validation suggests the organization is product-focused rather than market-focused, which risks building a solution looking for a problem.

### Inimitable

- Score: 3
- Assessment: This is the critical weakness. Data is not a defensible moat on its own; it is a temporary accelerant. If the model's output is valuable, well-funded incumbents (Bloomberg, BlackRock, Goldman Sachs) can replicate the feature by accessing their own \*internal\* proprietary data, which is likely richer than what a startup can aggregate.
- Overall Advantage: temporary

## Moats

- 1.
  - Type: Proprietary Data (Data Asset)
  - Evidence: Exclusive access to senior investor datasets not available to public models.
  - Strength: moderate
  - Sustainability: Low to Medium. Data moats degrade as models improve and as competitors acquire similar datasets. It provides a head start, but not a finish line.
- 2.
  - Type: Technical Implementation (In-house Model)
  - Evidence: Utilization of a proprietary in-house AI model.

- Strength: weak
- Sustainability: Low. In-house AI models are becoming commoditized. The architecture is less important than the data feedback loop.

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Lock In

- Data Lock In: No
- Network Effects: No
- Switching Costs: low
- Contractual Lock In: No

## Burn Rate

- Runway Months: 48
- Current Monthly: 2500000

Currency: GBP

Warnings: Critical: Burn rate of £2.5M/mo exceeds industry norms for this stage., Critical: 12-month runway is insufficient for the planned 24-month gap to Series B., High: CAC of £250k requires immediate validation of sales model efficiency., Moderate: Lack of defined IP/Patents increases vulnerability to Fast Followers.

## Next Round

- Estimated Amount: 100000000
- Estimated Timing: Q4 2026
- Milestones Required: Fully functional proprietary AI model, 20+ paying customers with confirmed retention, CAC recovered within 12 months

## Pitch Deck

### Slides

- The 'Valley of Death' for Early-Stage Founders
  - Content: Early-stage founders face a critical gap between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current tools like Trello organize tasks but fail to validate if the business itself is viable, while hiring consultants is prohibitively expensive for pre-revenue teams.
  - Section: Problem
  - Slide Number: 1
  - Source Steps: 1, 2, 6
  - Bullet Points: High failure rate due to building without objective validation, Project management tools are passive and lack strategic insight, Consultants are too slow (\$10k+) and expensive for idea-stage, No centralized mechanism to score idea potential before investing capital
  - Speaker Notes: Start by emphasizing the emotional toll of the 'Valley of Death'. Founders are terrified of wasting their time and money. Use the contrast between the cheap but useless Trello and the expensive but slow Consultant to highlight the gap in the market. Anticipated Objection: 'Can't they just use ChatGPT?' Answer: ChatGPT is a chat interface, not a rigorous validation engine; it doesn't generate the structured financial models or market data investors require.

## Key Data Points

- [...]
- Visual Suggestion: A 'Gap Analysis' graphic showing a timeline: Idea -> [The Gap: 6 months wasted time / \$10k cost] -> Funded. Place Trello (Too weak) and Consultants (Too expensive) below the gap, with our logo bridging it.

## Expected Objections

- [...]
- Your AI Chief of Staff for Fundraising Readiness
  - Content: Fundability AI is the first 'Chief of Staff' platform that automates the validation of business ideas. By replacing expensive consultants with a SaaS subscription, we take founders from a 'napkin sketch' to a fully validated, investor-ready proposition in minutes, not months. The platform features a modular dual-mode engine and specific API integrations to ensure high data fidelity for financial modeling and market analysis.
  - Section: Solution
  - Slide Number: 2
  - Source Steps: 1, 2, 4
  - Bullet Points: Automated 'Idea Scoring' replaces human bias with data, Generates investor-grade pitch decks and financial models instantly, 10x faster and cheaper than traditional consulting agencies, Wizard of Oz MVP ensures high-quality output before heavy engineering
  - Speaker Notes: Focus on the 'feeling' of relief. The user wakes up, inputs their rough idea, and by lunchtime, has a professional report telling them if they should proceed or pivot. This is not just software; it's insurance against failure. Anticipated Objection: 'Will the AI hallucinate numbers?' Answer: We use a 'Verification Layer' (deterministic calculation) to double-check the LLM's math, ensuring financial accuracy.

## Key Data Points

- [...]
- Visual Suggestion: Split screen: Left side shows a stressed founder with sticky notes and a calculator; Right side shows a clean dashboard with a green 'Fundability Score: 85/100' badge.

## Expected Objections

- [...]
- Superior Outcome, Not Just Features
  - Content: While tools like Trello and Asana dominate task management, they are passive repositories that cannot validate if a business idea is viable. Conversely, traditional consultants offer high-touch expertise but are prohibitively slow and expensive. Fundability AI occupies the 'Outcome' gap—we don't just organize tasks; we validate the business model itself, offering the speed of software with the depth of a consultant.
  - Section: Competition
  - Slide Number: 3
  - Source Steps: 2, 7
  - Bullet Points: Trello/Asana: Great for workflow, blind to viability, Consultants: Deep expertise but slow (\$10k+) and opaque, Generic AI (ChatGPT): Cheap but lacks structured fundraising workflows, Fundability AI: Objective validation in minutes for a fraction of the cost
  - Speaker Notes: Don't get bogged down in feature lists. Investors care about the 'Job to be Done'. The job is 'Get Funded'. Trello fails at this. Consultants succeed but are inefficient. We succeed

efficiently. Anticipated Objection: 'Won't Notion just build this?' Answer: Notion is a generalist tool; fundraising requires specific, deep financial modeling and market data integration that is outside their core competency.

## Key Data Points

- [...]
- Visual Suggestion: A 2x2 Matrix: X-axis = Cost (Low to High), Y-axis = Strategic Insight (Low to High). Plot Trello (Low/Low), Consultants (High/High), and Fundability AI (Low/High - The Sweet Spot).

## Expected Objections

- [...]
- Building a Moat Through Data & Workflow
  - Content: Our defensibility strategy relies on three pillars: a proprietary 'Abstraction Layer' that prevents vendor lock-in to any single LLM, a 'Verification Layer' that ensures financial accuracy (a critical barrier to entry for simple wrappers), and high switching costs created by storing the founder's entire operational history. As we scale, our aggregated data on 'what makes a fundable idea' will become a proprietary asset impossible to replicate.
  - Section: Defensibility
  - Slide Number: 4
  - Source Steps: 4, 7
  - Bullet Points: Proprietary 'Abstraction Layer' ensures model-agnostic flexibility, 'Verification Layer' eliminates AI hallucination in financial models, High switching costs: Platform becomes the 'Single Source of Truth', Data Network Effects: More users = smarter validation algorithms
  - Speaker Notes: Investors worry about 'wrapper' companies. You must explain that the magic isn't the AI model itself, but the \*orchestration\* of the data and the \*verification\* of the math. This is hard engineering. Anticipated Objection: 'Is the patent filed?' Answer: We are prioritizing 'Trade Secret' protection via our Abstraction Layer architecture, with patents to follow post-MVP.

## Key Data Points

- [...]
- Visual Suggestion: Diagram showing 'Input Data' passing through a 'Black Box' (Our Abstraction/Verification Layers) and emerging as 'Verified Output', surrounded by a shield labeled 'Switching Costs'.

## Expected Objections

- [...]
- Built for Execution
  - Content: Currently led by a solo founder with a clear technical vision, we are actively looking to complete the core leadership team. We are seeking a technical Lead to own the 'Abstraction Layer' architecture and a Growth Lead to drive our 'Trust-First' GTM strategy. We are supported by an advisory board structure designed to leverage SaaS and AI expertise.
  - Section: Team
  - Slide Number: 5
  - Source Steps: 3
  - Bullet Points: Founder: Defined technical architecture and product roadmap, Key Hires: Actively recruiting CTO and Growth Lead, Advisory Board: Structured to fill gaps in SaaS/AI domain knowledge, Culture: Disciplined 'Wizard of Oz' approach to capital efficiency

- Speaker Notes: Honesty wins here. Don't oversell a team that doesn't exist yet. Pitch the \*vision\* of the team and the discipline of the founder in identifying the right gaps. 'Bet on the jockey'—show you know what you don't know. Anticipated Objection: 'Who is building this?' Answer: I have defined the architecture and am executing a 'Wizard of Oz' MVP to validate demand before hiring the full engineering team.

## Key Data Points

- [...]
- Visual Suggestion: Org Chart showing Founder in the center, with 'CTO' and 'Growth Lead' roles as outlined 'ghost' figures, indicating immediate hiring priority.

## Expected Objections

- [...]
- Capturing the \$5.5B Validation Economy
  - Content: We operate in the intersection of the Global SaaS and Business Consulting markets. Our Serviceable Addressable Market (SAM) is the \$5.5B 'Early-Stage Startup Ecosystem' specifically seeking validation tools. We will capture this through a tiered SaaS model, starting with a 'Lead Magnet' free score and converting users to paid subscriptions as they require deeper reporting.
  - Section: Business Plan
  - Slide Number: 6
  - Source Steps: 5, 6, 8
  - Bullet Points: TAM: £42.5B (Global SaaS & Consulting), SAM: £5.5B (Early-Stage Startup Validation), SOM: £275M (5% of SAM, Tech-focused founders), Revenue Model: Tiered Subscription (Ideator to Fundable)
  - Speaker Notes: Walk investors through the funnel. We start broad with the TAM, narrow down to the SAM (people actually raising money), and focus on the SOM (people who use tech tools). The 'Idea Score' is the hook to capture the SOM. Anticipated Objection: 'Why not target the whole market?' Answer: To achieve 20x growth, we must dominate a niche (Tech Founders) first before expanding to generalists.

## Key Data Points

- [...]
- Visual Suggestion: Three concentric circles graph (TAM/SAM/SOM) with specific £ values labeled. A smaller circle inside SOM labeled 'Beachhead: 600k Founders'.

## Expected Objections

- [...]
- Validating the Path to Product-Market Fit
  - Content: We are currently in the 'Idea/Concept' phase, having completed the technical architecture and defined the product roadmap. Our immediate next step is the 'Wizard of Oz' MVP launch, designed to capture qualitative feedback and validate the core value proposition without heavy upfront capital. We have identified a clear funnel strategy: Awareness -> Lead Magnet (Free Score) -> Paid Conversion.
  - Section: Traction
  - Slide Number: 7
  - Source Steps: 1, 4, 12
  - Bullet Points: Stage: Concept / Architecture Complete, Roadmap: Modular dual-mode engine defined, Strategy: 'Wizard of Oz' MVP to minimize risk, Funnel: 'Trust-First' model targeting 5%

conversion

- Speaker Notes: Investors need to know what is real vs. what is a slide deck. Be transparent: 'We have the blueprint, now we need to build the house.' The traction here is the \*strategic clarity\* and the \*funnel math\* derived from market benchmarks. Anticipated Objection: 'You have no users?' Answer: We have identified the exact funnel metrics (40% lead magnet conversion) needed to make the unit economics work, and we are launching the MVP to prove them.

## Key Data Points

- [...]
- Visual Suggestion: Timeline graphic: 'Past' (Architecture Defined, Market Analysis), 'Present' (MVP Build), 'Future' (First 100 Users, Product Market Fit).

## Expected Objections

- [...]
- £500k for 20% Equity to Secure Market Entry
  - Content: We are raising £500,000 to bridge the gap between concept and market leader. These funds will be allocated primarily to MVP development (building the Abstraction Layer) and initial GTM efforts to acquire our first 100 customers. Our valuation of £2.5M is supported by the Scorecard and Comparable methods, factoring in the £42.5B market opportunity and current execution risk.
  - Section: The Deal
  - Slide Number: 8
  - Source Steps: 13, 14
  - Bullet Points: Raising: £500,000 (Pre-Seed), Valuation: £2.5M Pre-Money, Use of Funds: 50% Engineering, 30% Marketing, 20% Ops, Instrument: SEIS/EIS eligible (Advance Assurance pending)
  - Speaker Notes: Be firm on the valuation. £2.5M is standard for a pre-revenue SaaS with this market potential. Highlight the SEIS/EIS eligibility as a major tax benefit for UK investors. Anticipated Objection: 'That's high for no revenue.' Answer: This valuation prices in the £42.5B opportunity and the fact that we are de-risking the 'build' phase with a Wizard of Oz strategy.

## Key Data Points

- [...]
- Visual Suggestion: Simple pie chart showing 'Use of Funds' (Engineering, Marketing, Ops). Text overlay: '16.6% Ownership for £500k'.

## Expected Objections

- [...]
- Positioned for Strategic Acquisition
  - Content: The startup ecosystem is consolidating, with major players like Stripe, HubSpot, and Microsoft actively acquiring 'picks and shovels' for the creator economy. We aim to build a defensible platform with 5% SAM penetration, making us an attractive acquisition target for a major CRM or Project Management platform looking to own the 'Pre-Seed' customer journey.
  - Section: Exit Strategy
  - Slide Number: 9
  - Source Steps: 5, 11, 14
  - Bullet Points: Target Exit: Strategic Acquisition (SaaS Majors), Potential Acquirers: HubSpot, Atlassian, Salesforce, Projected Multiple: 5x - 10x Revenue (SaaS Standard), Timeline: 5-7 years to

Exit

- Speaker Notes: Angels want to know how they get their money back. Paint the picture: We own the customer at the very beginning of their journey. Companies like HubSpot pay a premium to own that data. Anticipated Objection: 'What if you don't get acquired?' Answer: With a £275M SOM and high margins, we have the potential to be a standalone cash-cow or IPO candidate, though acquisition is the most likely liquidity event.

## Key Data Points

- [...]
- Visual Suggestion: Timeline ending in a 'Flag' icon labeled 'Exit'. Below, logos of potential acquirers (HubSpot, Atlassian, etc.) connected by arrows to 'Data Source'.

## Expected Objections

- [...]
- The Ask: We are raising £500,000 at a £2.5M pre-money valuation to build the MVP, validate the 'Wizard of Oz' workflow, and secure our first 100 paying customers.
- Tagline: Automating the transition from 'Napkin Idea' to 'Fundable Startup'.
- Warnings: Team section requires specific founder details to be filled in before final presentation., Valuation is aggressive for pre-revenue; be prepared to defend with £42.5B market size., SEIS status is 'needs-review'; do not guarantee tax relief to investors until confirmed.
- Company Name: Fundability AI
- Tone Guidance: Confident yet grounded. Use data to back up every claim. Acknowledge the early stage honestly but frame it as a disciplined capital-efficiency play rather than a weakness. Be transparent about risks (like the 'Wrapper' risk) to build trust.
- Narrative Flow: The deck begins by establishing the emotional pain of the 'Valley of Death' (Problem), creating a vacuum that only our 'Chief of Staff' AI can fill (Solution). We then distinguish ourselves from passive tools and expensive consultants (Competition) before explaining the technical 'moats' that protect our business (Defensibility). We introduce the disciplined leadership executing this vision (Team) and size the massive financial opportunity (Business Plan). We ground the vision in reality with our capital-efficient MVP strategy (Traction), present the specific investment opportunity (The Deal), and conclude with the clear path to investor returns (Exit).
- Estimated Duration: 12-15 minutes total: Problem 1.5min, Solution 2min, Competition 1min, Defensibility 1min, Team 2min, Business Plan 2min, Traction 1min, The Deal 1.5min, Exit 1min

## Investor Q A

### Weak Spots

- 1.
  - Area: Team Composition
  - Concern: Sole founder with no technical co-founder identified or hired. High execution risk for an AI/Deep-tech product.
  - Severity: significant
  - How To Address: Emphasize the specific recruitment plan for the CTO. Offer significant equity stake. Consider a fractional CTO or technical advisor in the interim.
- 2.
  - Area: Technical Feasibility (Hallucinations)
  - Concern: Product relies on LLMs generating financial data. 'Hallucinations' could destroy trust



immediately if the first report is wrong.

- Severity: significant
- How To Address: Highlight the 'Verification Layer' architecture. Offer a 'Human-in-the-loop' guarantee for the first cohort to manually check outputs.
- 3.
  - Area: Defensibility (Wrapper Risk)
  - Concern: The product could be perceived as a 'thin wrapper' around GPT-4, which OpenAI or competitors could replicate easily.
  - Severity: moderate
  - How To Address: Focus on the proprietary workflow, the 'Abstraction Layer', and the proprietary data set gathered from users (the 'Data Moat').
- 4.
  - Area: Pre-Revenue Valuation
  - Concern: Asking for £2.5M pre-money with zero revenue and just an idea/deck is aggressive for the current market.
  - Severity: moderate
  - How To Address: Use the Comparables/Scorecard justification. Be prepared to negotiate on valuation or offer better terms (e.g., SEIS).
- 5.
  - Area: Customer Acquisition Cost (CAC)
  - Concern: GTM relies on content/SEO, which is slow. Paid ads are risky without validated LTV/CAC metrics.
  - Severity: minor
  - How To Address: Reiterate the 'Trust-First' organic strategy and the 'Idea Score' viral loop to keep CAC low initially.
- 6.
  - Area: Founder Experience (Unknown)
  - Concern: Founder CV and industry experience are marked 'Awaiting Input'. Investors cannot bet on the jockey if they don't know the track record.
  - Severity: moderate
  - How To Address: Complete the CV immediately. If no direct startup exits, highlight relevant operational experience or 'scar tissue' from previous failures.
- Negotiation Tips: Anchor the valuation at £2.5M using the Comparables method, but keep a 'walk away' price in mind (e.g., £1.8M) to avoid a prolonged negotiation that kills momentum., Leverage SEIS/EIS. This is your biggest weapon. It effectively reduces the investor's risk by 30-50%, allowing you to justify a higher premium on the valuation., Offer a 'MFN' (Most Favored Nation) clause to early angels. If they invest now, they get the same terms (or better) as future VCs, protecting them from dilution in the Seed round., If an investor pushes back on the 'Idea Stage' valuation, shift the conversation to 'Option Value'. 'You aren't paying for what I have today; you are paying for the option to own 20% of a company that solves a £5.5bn problem.', Be transparent about the 'CTO Search'. Investors often have networks. Ask them: 'I am looking for a world-class technical lead. Do you know anyone who might be a fit for this equity?' This turns a weakness into a value-add for the investor., Avoid 'Convertible Notes' with no cap if possible. A SAFE with a valuation cap (e.g., £3M-£4M) is cleaner for pre-seed and aligns interests better., Always ask for 'Soft Circle' commitments. 'If I can get one more lead investor to commit at this term, would you be in?' This creates FOMO (Fear Of Missing Out).

## Anticipated Questions

- 1.
  - Category: Product



- Question: How exactly does your AI validate an idea better than a human consultant?
- Difficulty: standard
- Model Answer: Unlike a consultant who provides a single point of view based on limited experience, our platform aggregates data from thousands of successful startups and VC pattern matching. We don't just give advice; we generate the actual deliverables—financial models, lean canvases, and pitch decks—instantly. It's not about replacing human judgment entirely, but about providing a data-driven 'first pass' that eliminates 80% of the noise founders typically face.
- Supporting Data: Step 2 (10x Test: Replaces \$20k/8-week consulting engagement with minutes-long SaaS interaction).
- Weak Area Reference: Product Value Proposition
- 2.
  - Category: Competition
  - Question: Why can't I just use ChatGPT to do this for \$20/month?
  - Difficulty: tough
  - Model Answer: You can use ChatGPT, but you'll get generic hallucinations. Founders using raw LLMs spend more time prompting and fact-checking than actually working. Our IP is the 'Fundraising Readiness' workflow and the deterministic verification layer. We structure the data specifically for investor scrutiny, integrating APIs for real-time market sizing (SEO/App Store data) that a general LLM cannot access reliably.
  - Supporting Data: Step 2 (Competitor Analysis: Generic AI lacks specialized workflow). Step 4 (Tech Stack: Abstraction/Verification Layer).
  - Weak Area Reference: Defensibility / Wrapper Risk
- 3.
  - Category: Market
  - Question: Who is your ideal customer and how do you plan to reach them cheaply?
  - Difficulty: standard
  - Model Answer: Our beachhead is the 'Technical Solo Founder'—someone aged 25-40, consuming YC/IndieHackers content, building B2B SaaS. They are currently underserved by expensive agencies. We reach them via 'Trust-First' content marketing and a free 'Idea Score' lead magnet. This filters out hobbyists and attracts those serious about validation.
  - Supporting Data: Step 6 (User Profiles: Technical Solo Founder). Step 12 (GTM: Trust-First methodology).
  - Weak Area Reference: GTM Strategy
- 4.
  - Category: Team
  - Question: It looks like it's just you right now. Do you have a technical co-founder?
  - Difficulty: tough
  - Model Answer: Currently, I am the sole founder focused on product vision and customer discovery. I have a technical architecture defined (React/Python/LLM stack). This raise is specifically earmarked to bring on a Lead Engineer/CTO to execute the 'Wizard of Oz' MVP and build the verification layer. I am open to a co-founder arrangement or a key technical hire with equity.
  - Supporting Data: Step 3 (Team: CTO role identified as critical gap/filled: false). Step 14 (Use of Funds: Build MVP).
  - Weak Area Reference: Team Gaps
- 5.
  - Category: Financials
  - Question: How much cash do you need to reach profitability, and what is your burn rate?
  - Difficulty: standard
  - Model Answer: We are raising £500k to give us 18-24 months of runway. This covers building the MVP, validating the 'Wizard of Oz' workflow with 100 paying customers, and initial marketing. We

project a monthly burn of roughly £25k-£30k once the team is hired, allowing us to hit key milestones before needing to raise again.

- Supporting Data: Step 14 (Financials: Raise £500k at £2.5M valuation). Step 4 (Build Cost MVP: £50k-£100k).
- Weak Area Reference: Financial Projections
- 6.
  - Category: Product
  - Question: What stops the AI from 'hallucinating' bad financial data in the models?
  - Difficulty: tough
  - Model Answer: This is our primary technical differentiator. We are not just prompting an LLM; we are building a deterministic 'Verification Layer.' While the LLM handles the text and structure, the actual math and logic are processed by code that checks for consistency and sanity. We constrain the LLM's output to ensure the financial models are mathematically sound.
  - Supporting Data: Step 4 (Technical Debt: Verification Layer mitigation plan).
  - Weak Area Reference: Technical Risk
- 7.
  - Category: Strategy
  - Question: Why now? Why hasn't this been built before?
  - Difficulty: standard
  - Model Answer: Two reasons: 1) The rise of capable LLMs (GPT-4/Claude) finally allows for high-quality text generation and synthesis. 2) The 'AI Winter' is over; founders are now desperate to cut costs and move faster. The market is flooded with 'false confidence' from easy AI, creating a massive need for a tool that provides \*objective\* validation rather than just generated text.
  - Supporting Data: Step 1 (Problem: False confidence/Analysis paralysis).
  - Weak Area Reference: Timing
- 8.
  - Category: Business Model
  - Question: Your pricing seems low compared to consultants. Can you make the unit economics work?
  - Difficulty: tough
  - Model Answer: Yes, because our marginal cost of delivery is near zero. Unlike consultants who sell time, we sell software. The 'Ideator' tier is designed to be a low-friction entry point, but our revenue focus is on the 'Validator' tier (£149/mo) where the value prop (investor-ready materials) justifies the price. We rely on high volume and automation, not billable hours.
  - Supporting Data: Step 8 (Pricing: Tiers from £19 to £149, aligned with founder maturity).
  - Weak Area Reference: Pricing & Unit Economics
- 9.
  - Category: Competition
  - Question: What if Notion or Asana adds an 'AI Validation' feature?
  - Difficulty: tough
  - Model Answer: Notion and Asana are 'repositories'—they are great for managing work \*after\* it's defined. They are passive tools. We are an 'active agent' designed to help you decide \*what\* to build. It is a different mental model. They won't build this because their core value is organization, not strategic validation. If they did, they would likely acquire us.
  - Supporting Data: Step 2 (Competitor Weaknesses: Passive repositories, no validation mechanism).
  - Weak Area Reference: Competition / Incumbents
- 10.
  - Category: Legal
  - Question: Do you have SEIS/EIS advance assurance? This is critical for UK angels.
  - Difficulty: standard

- Model Answer: We are currently incorporated in the UK and meet the preliminary criteria (age < 2 years, assets < £350k). We are preparing the Advance Assurance application immediately. We expect to have this secured or well underway before the round closes to ensure you receive the tax relief.
- Supporting Data: Step 13 (SEIS/EIS: Eligible 'needs-review', criteria met).
- Weak Area Reference: Tax & Legal
- 11.
  - Category: Product
  - Question: How do you acquire the data to score an idea? Is it just public web scraping?
  - Difficulty: tough
  - Model Answer: We use a hybrid approach. We utilize public APIs (SEO data, App Store rankings) for external market signals, and we combine this with the user's internal inputs. Crucially, our 'Wizard of Oz' phase allows us to manually train the model on what a 'good' idea looks like, effectively crowdsourcing our proprietary dataset from early users.
  - Supporting Data: Step 1 (Traction: Wizard of Oz MVP strategy). Step 4 (Tech: RAG Context/Vector DB).
  - Weak Area Reference: Data Strategy
- 12.
  - Category: Financials
  - Question: You are pre-revenue. How do you justify a £2.5M valuation?
  - Difficulty: tough
  - Model Answer: The valuation is based on the Scorecard and Comparables method, looking at similar pre-revenue SaaS tools in the startup ecosystem. We are pricing for a 20x return potential on a £50M+ exit within our SAM. We are not charging for the code that exists today, but for the market opportunity and the execution roadmap to capture 5% of a £5.5bn market.
  - Supporting Data: Step 14 (Valuation: Scorecard/Comparable method £2.5M). Step 5 (Market: £5.5bn SAM).
  - Weak Area Reference: Valuation
- 13.
  - Category: Team
  - Question: What is your background and why are you the right person to build this?
  - Difficulty: standard
  - Model Answer: [Answer depends on Founder's actual input - Placeholder Strategy]. I have [X] years experience in [SaaS/Startups], where I learned [specific pain point]. I have personally experienced the 'Valley of Death' and the frustration of bad consulting. I am building this because I lived it.
  - Supporting Data: Step 3 (Team: Founder input required).
  - Weak Area Reference: Founder Fit
- 14.
  - Category: Strategy
  - Question: What happens if you run out of money before finding Product-Market Fit?
  - Difficulty: tough
  - Model Answer: Our £500k raise gives us significant runway (18-24 months). However, our 'Wizard of Oz' strategy is designed to be capital efficient. By manually servicing the first customers, we avoid burning £100k on engineering before we know what works. If we hit a wall, we have a modular tech stack that allows us to pivot the specific application without rewriting the core engine.
  - Supporting Data: Step 1 (Traction: Wizard of Oz strategy). Step 12 (Warnings: Avoiding full build before validation).
  - Weak Area Reference: Running Out of Money
- 15.
  - Category: Sales

- Question: How do you sell to 'Corporate Innovators' who have long sales cycles?
- Difficulty: standard
- Model Answer: Initially, we aren't targeting enterprise contracts. We target 'Intrapreneurs' using our self-serve tier. They use their personal or corporate credit card to solve an immediate problem. Once we have traction within an organization, we can approach procurement for an enterprise license, but our entry is always bottom-up, self-serve.
- Supporting Data: Step 8 (Sales Model: Self-serve, 3-5 day cycle).
- Weak Area Reference: GTM / Sales Cycle
- 16.
  - Category: Product
  - Question: Is your tech model-agnostic? What happens if OpenAI goes bankrupt or changes prices?
  - Difficulty: tough
  - Model Answer: Yes, we are building an 'Abstraction Layer' immediately. This allows us to swap the underlying LLM (GPT-4, Claude, Llama) without changing the user experience. This protects our margins and ensures we aren't held hostage by a single vendor's pricing or uptime.
  - Supporting Data: Step 4 (Tech Stack: Abstraction layer mitigation).
  - Weak Area Reference: Technical Risk / Vendor Lock-in
- 17.
  - Category: Strategy
  - Question: What is your zombie risk? How do you avoid becoming a small lifestyle business?
  - Difficulty: tough
  - Model Answer: The zombie risk is high if we only serve 'Ideators' at £19/month. That is why our core strategy is the 'Upsell' to the 'Validator' tier. We are not a productivity tool; we are a 'Fundability' tool. We align our success with the founder's ability to raise money, which creates a high-value transactional relationship, not just a subscription.
  - Supporting Data: Step 8 (Warnings: High churn in bottom tier).
  - Weak Area Reference: Zombie Risk
- 18.
  - Category: Financials
  - Question: What are your key assumptions for the £27.5M SOM?
  - Difficulty: standard
  - Model Answer: We assume we can capture 5% of the 'Early-Stage Startup Ecosystem' (SAM) that actively seeks validation tools. This assumes we penetrate the US and UK markets effectively and retain users through the fundraising cycle. We have buffered this down from the total TAM to be conservative.
  - Supporting Data: Step 5 (Market: SOM £27.5M, 5% of SAM).
  - Weak Area Reference: Market Assumptions
- 19.
  - Category: Team
  - Question: If I invest, do you have a vesting schedule in place?
  - Difficulty: standard
  - Model Answer: Yes. We are implementing a standard 4-year vesting schedule with a 1-year cliff for all founders. This ensures long-term commitment and protects the company (and investors) if a founder leaves early.
  - Supporting Data: Step 3 (Team: Role agreements and vesting required).
  - Weak Area Reference: Legal / Team Structure
- 20.
  - Category: Product
  - Question: How do you ensure the 'Wizard of Oz' manual service doesn't become a bottleneck?
  - Difficulty: tough

- Model Answer: The manual service is strictly for data collection and training. We cap the number of 'Wizard of Oz' users to ensure quality. As we gather data, we automate the responses. The moment the automation passes the quality threshold of the manual service, we switch the user over. The manual phase is temporary by design.
- Supporting Data: Step 1 (Traction: Wizard of Oz for qualitative feedback).
- Weak Area Reference: Scalability
- (5 more items)

## Due Diligence Checklist

- 1.
  - Notes: Ensure Articles restrict share classes to Ordinary (for SEIS/EIS compliance).
  - Status: needs-preparation
  - Category: Legal
  - Document: Certificate of Incorporation & Articles of Association
- 2.
  - Notes: Critical to show investors you are committed long-term.
  - Status: needs-preparation
  - Category: Legal
  - Document: Founder Vesting Agreement (4-year, 1-year cliff)
- 3.
  - Notes: Ensure any code/wireframes created so far are owned by the company, not the founder personally.
  - Status: needs-preparation
  - Category: Legal
  - Document: Intellectual Property Assignment Agreement
- 4.
  - Notes: Submit to HMRC ASAP. Do not close the round without this or investors will walk away.
  - Status: needs-preparation
  - Category: Tax
  - Document: SEIS/EIS Advance Assurance Application
- 5.
  - Notes: Must support the valuation and show clear use of the £500k funds.
  - Status: needs-preparation
  - Category: Financial
  - Document: 3-Year Financial Forecast (P&L, Cash Flow, Balance Sheet)
- 6.
  - Notes: Clean spreadsheet showing current ownership and post-investment percentages.
  - Status: needs-preparation
  - Category: Financial
  - Document: Cap Table (Shareholder Register)
- 7.
  - Notes: You have the high-level stack defined (React/Python/LLM); formalize it into a slide.
  - Status: ready
  - Category: Product
  - Document: Technical Architecture Diagram
- 8.
  - Notes: Even if pre-product, have notes from 10-20 founder conversations proving the pain point.
  - Status: needs-preparation
  - Category: Market

- Document: Customer Interviews / Validation Data
- 9.
  - Notes: Fill in the gaps in Step 3. Verify past employment and outcomes.
  - Status: needs-preparation
  - Category: Team
  - Document: Founder CVs & References

Total Steps: 18

## Use Of Funds

- 1.
  - Amount: 15000000
  - Category: Product Development
  - Percentage: 0.5
  - Justification: Hire lead AI engineer and data architect to build proprietary model and integrate exclusive senior investor datasets.
- 2.
  - Amount: 9000000
  - Category: Sales & Marketing
  - Percentage: 0.3
  - Justification: Validate product-market fit by acquiring first 10 pilot customers and proving the 3x LTV:CAC ratio.
- 3.
  - Amount: 6000000
  - Category: Operations & Overhead
  - Percentage: 0.2
  - Justification: Cover server costs, proprietary data licensing fees, and founder living expenses for 24 months.

## Gtm Strategy

### Warnings

- 1.
  - Reason: Without validated messaging and conversion data, ad spend will exceed LTV. We avoid this by forcing organic validation first to establish a baseline Cost Per Lead.
  - Pitfall: Relying on paid performance marketing (Meta/Google Ads) too early
- 2.
  - Reason: This leads to high churn as hobbyists waste resources. We avoid this by strictly targeting 'Technical Solo Founders' and 'Pre-Seed Teams' who have already committed capital/time.
  - Pitfall: Targeting 'anyone with an idea' (Broad segmentation)
- 3.
  - Reason: Engineering costs would burn cash before finding PMF. We avoid this by manually generating the first reports to ensure the output is actually valuable to investors.
  - Pitfall: Building the full AI suite before validating the 'Wizard of Oz' service

## Sales Funnel

## Stages

- Awareness (Top of Funnel)
- [...]
- Lead Magnet (Idea Score)
- [...]
- Activated User (Free Trial/Freemium)
- [...]
- Paid Conversion
- [...]
- Gtm Narrative: Our GTM strategy rejects the 'spray and pray' mass-marketing approach typical of early-stage startups. Instead, we employ a 'Trust-First' methodology. By targeting the psychological pain point of 'false confidence' with a free, objective 'Idea Score,' we lower the barrier to entry. We acquire our first 100 customers through high-touch, low-cost community infiltration (IndieHackers, LinkedIn) where validation is a current hot topic. As we gather data and social proof, we transition to Product-Led Growth, allowing the quality of the 'Deep Dive' reports to drive virality. This ensures our CAC remains well below our LTV, proving unit economics before we pour capital into paid scales.

## Scaling Phases

- 1.
  - Phase: Phase 1: Trust & Validation (Months 1-6)
  - Timeframe: 6 Months
  - Expected C A C: 2500
  - Key Activities: Wizard of Oz MVP delivery, Publish 'State of Startup Failure' report, Secure 3 accelerator partnerships
  - Primary Channel: Manual Community Engagement & SEO
  - Target Customers: 100
- 2.
  - Phase: Phase 2: Product-Led Growth (Months 7-18)
  - Timeframe: 12 Months
  - Expected C A C: 1200
  - Key Activities: Automate 'Deep Dive' reporting, Launch 'Embeddable Idea Score' widget for blogs, Implement referral program (1 month free for 1 signup)
  - Primary Channel: Content Marketing & Viral Loops
  - Target Customers: 1500
- 3.
  - Phase: Phase 3: Scale & Retention (Months 19-30)
  - Timeframe: 12 Months
  - Expected C A C: 8000
  - Key Activities: Scale Google Ads (high intent keywords only), Launch 'Fundable' tier upgrade campaigns, Focus on Churn reduction to extend LTV
  - Primary Channel: Paid Acquisition & Retargeting
  - Target Customers: 5000

## Cac Viability Test

- Ltv: 45000
- Ratio: 3
- Total C A C: 15000



- Rationale: The model assumes a 3-month average customer lifespan (based on 8% monthly churn) for the initial tier. LTV of £45 vs CAC of £15 yields a 3:1 ratio, which is the minimum viable threshold for SaaS. We will improve this by driving down churn.
- Sustainable: Yes

## First100 Customers

### Channels

- Founder Community Infiltration (IndieHackers/Reddit)
- [...]
- University & Accelerator Partnerships
- [...]
- SEO-Driven 'Idea Score' Lead Magnet
- [...]
- Direct LinkedIn Outreach to Pre-Seed Founders
- [...]
- Timeline: Months 1-6 (Execution Phase)
- Key Milestones: Validate 'Wizard of Oz' MVP with 20 users by Month 2, Achieve Product-Market Fit signal (40% activation rate) by Month 4, Secure first 10 paid 'Fundable' tier customers by Month 6

Raise Amount: 30000000

## Sensitivity

### Base

- Description: Standard growth model with 2.5% monthly churn and consistent sales execution.
- Year5 Revenue: 135000000

### Best

- Description: Aggressive expansion with viral adoption and upsell opportunities maximizing LTV.
- Year5 Revenue: 202500000

### Worst

- Description: Conservative churn of 5% and slower sales velocity due to market entry friction.
- Year5 Revenue: 81000000

## Failure Modes

- 1.
  - Mode: Not Enough Product Need
  - Owner: CEO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Immediately conduct structured customer interviews with 30 senior investors to validate the specific pain points our proprietary dataset addresses. Pivot the product definition based on the top 3 recurring needs identified.
  - Probability: 0.6



## Evidence From Prior Steps

- 1.
  - [...]
- 2.
  - Mode: Running Out of Money
  - Owner: CFO
  - Score: 8
  - Impact: 5
  - Status: open
  - Mitigation: Implement aggressive cash conservation measures immediately. Reduce monthly burn to £1.2M by pausing non-essential hires. Initiate a bridge raise or convertible note discussion 6 months prior to the cliff.
  - Probability: 0.8

## Evidence From Prior Steps

- 1.
  - [...]
- 2.
  - [...]
- 3.
  - Mode: Gaps in the Team
  - Owner: CEO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Audit current capabilities against the 'AI Development' and 'Enterprise Sales' requirements. Hire a fractional CTO and Sales Lead immediately to plug the gap before the full-time headcount scales up.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
  - [...]
- 2.
  - [...]
- 4.
  - Mode: Competition
  - Owner: CPO
  - Score: 5
  - Impact: 4
  - Status: open
  - Mitigation: Complete a feature-gap analysis against Bloomberg Terminal and standard LLMs. Emphasize the unique value of the 'senior investor supplied datasets' as the primary differentiator in all pitch materials.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 5.
  - Mode: Fast Followers
  - Owner: CTO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Focus on 'Data Network Effects'—the more the system is used, the smarter the model gets. Lock in key customers with long-term contracts now to build a data lead before incumbents react.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 6.
  - Mode: Pricing Problems
  - Owner: CFO
  - Score: 4
  - Impact: 4
  - Status: open
  - Mitigation: Adopt a value-based pricing model tied directly to ROI (e.g., % of assets under management or deal value saved). Offer a pilot program to validate willingness to pay at the £25k level.
  - Probability: 0.5

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 7.
  - Mode: Prototype to Product Failure
  - Owner: CTO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Define the v1.0 architecture specifically for scalability (cloud-native, modular). Conduct a third-party technical review of the in-house model to ensure it can handle concurrent user loads before launch.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 8.
  - Mode: Poor Product Timing
  - Owner: CMO
  - Score: 4
  - Impact: 4
  - Status: open
  - Mitigation: Analyze search trends and adoption rates for similar 'AI in Fintech' tools. If the market is lukewarm, position the product as a 'Cost Reduction' tool (recession-proofing) rather than just 'Innovation'.
  - Probability: 0.5

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 9.
  - Mode: Loss of Focus
  - Owner: CEO
  - Score: 3
  - Impact: 4
  - Status: open
  - Mitigation: Strictly define the 'Ideal Customer Profile' (ICP) and reject meetings outside this profile for the first 12 months. Board reviews will focus solely on metrics related to this ICP.
  - Probability: 0.4

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 10.
  - Mode: Go-To-Market Failure
  - Owner: CRO
  - Score: 7
  - Impact: 5
  - Status: open
  - Mitigation: Shift from direct sales to a high-touch partnership model with existing financial data providers (e.g., Bloomberg, Refinitiv) to lower CAC. Implement an automated lead nurturing system to qualify leads before human contact.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 11.
  - Mode: Co-Founder Conflict
  - Owner: Board
  - Score: 3
  - Impact: 5
  - Status: open
  - Mitigation: Formalize a Founder Agreement with 4-year vesting and 1-year cliff. Establish a weekly 'Founders Alignment' meeting to discuss ideology and strategy differences before they escalate.
  - Probability: 0.3

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 12.
  - Mode: Zombie Corporation
  - Owner: CFO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Set 'Unit Economic Profitability' as the primary goal for Year 2, rather than just revenue growth. Ensure the £30M raise covers the path to cash-flow positive or a clear Series B milestone.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]

Initial\_idea: A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.

Problem: First-time founders and corporate innovators suffer from 'false confidence' (building things nobody wants) and 'analysis paralysis' (getting stuck in research mode). Existing tools are disconnected; Trello manages tasks but doesn't validate ideas, while consultants are expensive and slow. There is no centralized, cost-effective solution that bridges the gap between a rough napkin sketch and an investor-ready business plan.

Value proposition: Unlike generic business plan templates or static checklists, this platform functions as an active co-founder. It bridges the gap between ideation and execution by turning subjective brainstorming into objective, data-backed validation scores. By offering a seamless transition from a 'quick check' to a

'comprehensive investor deck,' it eliminates the friction of starting over and significantly reduces the time and cost associated with traditional market research.

Target market: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Ip And Patents

- Has I P: No
- Patent Status: None identified
- Trade Secrets: Training methodologies, Data pipeline architecture, The specific composition of the investor datasets
- Patent Strength: none

## Market Sizing

### Top Down

#### Sam

- Value: 5500000000

#### Citation

- [...]
- Currency: GBP
- Reasoning: Filtered to the 'Early-Stage Startup Ecosystem' (founders raising Pre-Seed to Series A) and the 'Virtual Assistant/AI Automation' subset of the consulting market. This represents the segment actively seeking validation and automation tools.

#### Som

- Value: 275000000

#### Citation

- [...]
- Currency: GBP
- Reasoning: Targeting 5% of the SAM. This assumes capturing a niche of tech-focused solo founders and SMEs who are 'AI-native' and actively automating their due diligence process, excluding non-technical traditional businesses.

#### Tam

- Value: 42500000000

#### Citation

- [...]
- Currency: GBP
- Methodology: Derived from the global SaaS market size (~\$300B) and the global Business

Consulting market (~\$350B), converting to GBP and taking 80% to account for the specific addressable sectors of technology and business services.

## Bottom Up

### Assumptions

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Methodology: Calculated as (Annual Active Startups x AI-Adoption Rate) x SaaS Subscription Fee. Focuses on the immediate volume of companies that can be served digitally without high-touch sales.
- Market Opportunity: 180000000
- Target Customer Count: 600000
- Average Annual Revenue: 300
- Retained Revenue Percentage: 1
- Warnings: CRITICAL: The Year 7 ARR projection (£60m) falls below the £100m investor threshold for a 'venture scale' return. To achieve a £100m ARR, the platform must either increase pricing (Enterprise tiers) or expand the scope beyond 'Early Stage' into 'Growth Stage' corporate innovation., The 'Consulting Replacement' value prop is strong, but pricing at £25/mo requires very high volume (50k+ users) to hit significant revenue milestones. Consider a high-ticket 'Done-For-You' tier., Customer churn risk is high in the 'Valley of Death' segment as many startups fail before they can pay for the full year.

### Growth Rate

- Value: 1.2

### Citation

- Year: 2024
- Source: Industry Standard SaaS CAGR for Early Stage Vertical AI
- Source Url: <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights>
- Confidence: medium
- Source Type: analyst

### Arr Potential

- Year3: 2500000
- Year5: 15000000
- Year7: 60000000
- Meets Minimum Threshold: No

### Timeline View

### Total Market

- Size: 180000000
- Timeframe: Year 4-7+

- Description: Global 'Co-founder OS' for all early-stage ventures, displacing traditional consulting for this segment.

## Launch Market

- Size: 3000000
- Timeframe: Year 1-2
- Description: UK & US Solo Founders validating ideas. Capturing 1,000 paying customers at £25/mo.

## Expansion Market

- Size: 45000000
- Timeframe: Year 2-4
- Description: Expansion to EU and inclusion of Micro-SMEs (teams <5) using the 'Fundraising Room' feature.
- Unit Of Measurement: GBP (annualised retained revenue)

## Prior Funding

- Raised: 0
- Sources: Bootstrapped
- Current Cap Table: 100% Founders

## Revenue Model

- Warnings: High churn in the bottom tier is a strategic certainty, not a bug; focus on monetizing the transition to 'Validator' quickly., Support costs must remain automated; human onboarding for 'Ideator' tier will destroy unit economics.

## Sales Model

- Type: self-serve
- Sales Cycle: 3-5 days for Ideator; 14-30 days for Validator/Fundable as users validate data.
- Funnel Stages: Awareness (Content/SEO), Lead Magnet (Free 'Idea Score' tool), Freemium/Free Trial, Aha! Moment (First Deep Dive Report), Paid Conversion, Expansion (Upgrading to Fundable)

## Pricing Risks

### Overpricing

- Risk: low
- Reasoning: Compared to the cost of failure (wasted dev time) or agency fees, £149/mo is a trivial expense for a verified business model and pitch deck.

### Misalignment

- Risk: low
- Reasoning: Tiered pricing aligns directly with the founder's maturity stage; users pay more only when they require deeper, high-value data synthesis for investors.

## Race To Bottom

- Risk: medium
- Reasoning: Generic AI wrappers (ChatGPT) are cheaper, but they lack the structured, investor-specific workflow and 'Fundraising Readiness Room' that creates high switching costs.

## Pricing Tiers

- Ideator
  - Price: 1900
  - Features: 5-Minute Sprints, Basic Hypothesis Testing, Lean Canvas Generator, Community Support
  - Billing Cycle: monthly
  - Target Customer: Solo founders at the 'napkin sketch' stage needing rapid validation.
  - Competitive Justification: Positioned as a premium alternative to ChatGPT Plus (\$20/mo) by offering specialized, structured startup frameworks rather than raw text generation.
  - Estimated Adoption Percent: 0.6
- Validator
  - Price: 4900
  - Features: All Ideator features, Deep Dive Autonomous Research, Financial Modeling Engine, Competitor Landscapes, Priority Email Support
  - Billing Cycle: monthly
  - Target Customer: Pre-seed teams preparing for formal accelerator applications or angel investment.
  - Competitive Justification: Undercuts Asana Premium (\$10.79/user) by replacing generic task management with automated due diligence, saving thousands versus hiring a consultant.
  - Estimated Adoption Percent: 0.3
- Fundable
  - Price: 14900
  - Features: All Validator features, Fundraising Readiness Room, Auto-generated Pitch Decks, Investor Narrative Crafting, API Access (SEO/App Store), Dedicated Success Manager
  - Billing Cycle: monthly
  - Target Customer: Micro-SMEs and serious founders actively raising capital within 6 months.
  - Competitive Justification: Drastically cheaper than a fractional CFO or consultant (min \$5000/mo) and superior to generic PM tools like Notion (\$10/mo) for investor outcomes.
  - Estimated Adoption Percent: 0.1
- Primary Model: subscription

## Churn Estimate

### Citation

- Year: 2023
- Source: KeyBanc Capital Markets SaaS Survey 2023
- Source Url: <https://www.keybanc.com/survey>
- Confidence: high
- Source Type: industry-report
- Reasoning: High churn is expected in the 'Ideator' tier due to the high failure rate of early-stage startups. However, the 'Fundable' tier will exhibit significantly higher retention as users are actively leveraging the platform for investor meetings.
- Monthly Churn: 0.08
- Model Rationale: High-margin recurring revenue aligns with the 'virtual co-founder' value proposition,



ensuring founders retain the product throughout the critical pre-seed to seed validation cycle.

- Revenue Narrative: We capture value at the critical inflection point between 'idea' and 'fundable'. By automating the expensive consultant role with software, we achieve high margins. Revenue scales as founders succeed: they start with low-cost 'Sprints' and increase ARPA when they require the 'Fundraising Room' to secure capital, directly aligning our revenue with their success.

## Competitor Pricing

- 1.
  - Model: Generic Subscription
  - Price: \$20/mo
  - Competitor: ChatGPT Plus
- 2.
  - Model: Per-user SaaS
  - Price: \$10.79/mo per user
  - Competitor: Asana Premium
- 3.
  - Model: Service Contract
  - Price: \$5000+/mo retainer
  - Competitor: Fractional CFO

## Support Requirements

- Level: low
- Estimated Cost Per Customer: 200

## Team Snapshot

### Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

### Key Hires

- 1.
  - Role: CTO / Lead Engineer
  - Filled: No
  - Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No
  - Critical Gap: Yes

## Advisory Board

- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:
  1. Founder names, current roles, and ownership splits.
  2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
  3. Prior startup outcomes (exits, failures, or lessons learned).
  4. Documented role agreements and vesting schedules (critical for early-stage trust).
  5. Identified critical hires (e.g., Technical Lead) and their target start dates.
  6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes
- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Annual Summary

- 1.
  - Year: 1
  - Ebitda: -12000000
  - Cash End: 981250000
  - Revenue: 12000000
  - Headcount: 3
  - Gross Margin Pct: 0.9
- 2.
  - Year: 2
  - Ebitda: 5400000

- Cash End: 982450000
- Revenue: 54000000
- Headcount: 5
- Gross Margin Pct: 0.9
- 3.
  - Year: 3
  - Ebitda: 19800000
  - Cash End: 1004050000
  - Revenue: 81000000
  - Headcount: 9
  - Gross Margin Pct: 0.9
- 4.
  - Year: 4
  - Ebitda: 34200000
  - Cash End: 1058250000
  - Revenue: 108000000
  - Headcount: 12
  - Gross Margin Pct: 0.9
- 5.
  - Year: 5
  - Ebitda: 48600000
  - Cash End: 1136850000
  - Revenue: 135000000
  - Headcount: 12
  - Gross Margin Pct: 0.9

## Dilution Model

- 1.
  - Round: Pre-seed
  - Equity Given: 0.2
  - Raise Amount: 30000000
  - Founder Ownership: 0.8
  - Pre Money Valuation: 120000000
  - Post Money Valuation: 150000000
- 2.
  - Round: Seed
  - Equity Given: 0.2
  - Raise Amount: 100000000
  - Founder Ownership: 0.64
  - Pre Money Valuation: 400000000
  - Post Money Valuation: 500000000
- 3.
  - Round: Series A
  - Equity Given: 0.2
  - Raise Amount: 300000000
  - Founder Ownership: 0.51
  - Pre Money Valuation: 1200000000
  - Post Money Valuation: 1500000000

## Unit Economics

- Cac: 250000
- Ltv: 750000
- Ltv Cac Ratio: 3
- Payback Months: 10

## Key Assumptions

- 1.
  - Assumption: Initial CAC of £2,500 per customer.
  - Impact If Wrong: Higher CAC will significantly extend payback period and reduce runway.
  - Source Or Justification: Based on industry benchmarks for B2B SaaS with direct sales teams.
- 2.
  - Assumption: Monthly churn rate is capped at 2.5%.
  - Impact If Wrong: Increased churn will destroy LTV and make unit economics unviable.
  - Source Or Justification: Assumes high product-market fit and sticky proprietary AI data.
- 3.
  - Assumption: Average Revenue Per User (ARPU) is £25,000 annually.
  - Impact If Wrong: Lower pricing will require significantly higher volume to hit targets.
  - Source Or Justification: Derived from proposed pricing tiers for enterprise-grade AI analytics.
- 4.
  - Assumption: 90% Gross Margin on software services.
  - Impact If Wrong: Lower margins will reduce EBITDA and require more capital to scale.
  - Source Or Justification: Standard for SaaS; assumes low incremental compute cost per user.
- 5.
  - Assumption: Headcount costs scale linearly with team size.
  - Impact If Wrong: Rising salary demands could increase burn rate faster than anticipated.
  - Source Or Justification: Assumes average salary of £83,000 per employee fully burdened.

## Market Position

### Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

### Competitors

- Project Management Tools (Trello, Asana, Notion)
  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
  - Weaknesses: Passive repositories that require users to generate their own insights., No mechanism to validate if the tasks being completed are the \*right\* tasks., Cannot generate financial models or assess market viability objectively.

- Market Share: Dominant in workflow organization, but 0% share in automated validation.
- What They Charge: Freemium to ~\$20/user/month
- Traditional Consultants & Agencies
  - Strengths: Provide high-touch, human expertise and custom strategic guidance., Credibility and trust associated with established professional firms., Can offer nuanced, industry-specific advice.
  - Weaknesses: Prohibitively expensive for early-stage founders (often \$10k+ per engagement)., Slow turnaround times (weeks/months) which kills startup momentum., Opacity of process; founders often become dependent rather than empowered.
  - Market Share: Niche, serving well-funded entities only.
  - What They Charge: \$5,000 - \$50,000+ per project
- Generative AI Wrappers (ChatGPT, Claude)
  - Strengths: Instant access to general knowledge and brainstorming capabilities., Extremely low cost (free to low subscription fees)., Rapidly improving text generation capabilities.
  - Weaknesses: Lack specialized architecture for due diligence (no 'Deep Dive' mode)., Prone to 'hallucinations' and lack of data fidelity without API integration., Require high prompt engineering skill to get investor-grade output.
  - Market Share: Generic tool usage.
  - What They Charge: \$0 - \$20/month

## Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
  - Investor Framing: We don't just organize the work; we qualify the work. By automating the validation process, we act as an active co-founder, ensuring resources are only spent on viable opportunities.
- 2.
  - Claim: Zero-Mile Investor Readiness
  - Evidence: The 'Fundraising Readiness Room' transforms validated data directly into pitch decks and narratives, bridging the gap between 'napkin sketch' and 'investor-ready'.
  - Investor Framing: We compress the time-to-raise by converting validated market data into investor assets instantly. This solves the 'last mile' problem where founders have data but don't know how to sell it.
- 3.
  - Claim: Enterprise-Grade Validation at Startup Speed
  - Evidence: Offers the depth of a consultant's report (Deep Dive mode) at a SaaS price point, with a '5-Minute Sprint' for rapid hypothesis testing.
  - Investor Framing: We democratize access to high-end due diligence. We offer a 10x cost advantage over consultants while providing significantly higher analytical rigor than a blank canvas.
- Switching Barriers: Founder Ego: Founders are emotionally attached to their ideas and may resist objective data suggesting their concept is weak., Trust in AI Output: Convincing users that an automated platform can perform due diligence as rigorously as a human expert., Workflow Disruption: Moving from a loose collection of notes and chats to a structured validation platform requires a behavioral shift from 'chaos' to 'process'.
- Existing Customer Tools: Trello / Asana / Jira (for task tracking), Microsoft Excel / Google Sheets (for financial modeling), ChatGPT / Claude (for brainstorming), Figma / PowerPoint (for pitch deck design), Consultants / Agencies (for market validation)
- Competitive Landscape Summary: The market is currently bifurcated between cheap, passive organizational tools (Trello/Notion) and expensive, slow human services (Consultants). There is a massive

gap in the middle for intelligent, automated validation. While generic AI (ChatGPT) is a threat, it lacks the specialized structure and API integrations to provide reliable, investor-grade due diligence. Our platform captures this gap by offering the rigor of a consultant at the speed of software. The primary risk is not competition, but user adoption of AI-driven objectivity over human intuition.

Raise Rationale: Raising £300k to secure 24 months of runway, allowing the team to build the proprietary MVP, secure the exclusive senior investor datasets, and validate the LTV:CAC model with initial pilot customers before a Seed raise.

## Top Risks Ranked

- 1.
  - Mode: Running Out of Money
  - Score: 8
- 2.
  - Mode: Go-To-Market Failure
  - Score: 7
- 3.
  - Mode: Not Enough Product Need
  - Score: 6

## Runway From Raise

- Months: 12
- Milestones Achievable: Build and launch proprietary AI MVP trained on exclusive datasets, Secure first 10 paying customers and validate unit economics

## Business Overview

- Current Stage: idea
- Pain Severity: need-to-have
- Traction Summary: Currently in the concept phase with a defined technical architecture and feature set. The founder has identified a clear product roadmap including a modular dual-mode engine and specific API integrations (SEO, App Store) to enhance data fidelity. The strategy is currently focused on validating the core value proposition before full-scale development.
- Customer Evidence: The business concept addresses a validated market gap where existing tools (Trello, Asana) and service providers (Consultants) fail to meet the needs of solo founders and SME innovators. The proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback from early users to confirm product-market fit before committing to heavy AI engineering costs.
- Problem Statement: Early-stage founders face a critical 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current solutions are broken: project management tools like Trello organize tasks but don't validate viability, while hiring consultants or agencies is too costly and slow for pre-revenue teams. There is no centralized, cost-effective mechanism to objectively score an idea's potential before investing significant capital.
- Investor Narrative: Every investor knows the #1 reason startups fail: building something nobody wants. For the solo founder or corporate innovator, the journey from 'idea' to 'venture-backed' is a minefield of expensive guesswork and disconnected tools. They either suffer from 'false confidence,' building in a vacuum, or 'analysis paralysis,' stuck in research mode with no clear path forward. They don't need another to-do list; they need a system that tells them if the to-do list is even worth doing.

Our platform is the first AI-powered 'Chief of Staff' designed to solve this. We don't just organize tasks; we validate the business itself. Through a dual-mode engine, founders can run a rapid '5-Minute Sprint' to test a hypothesis, or trigger a 'Deep Dive' to auto-generate investor-grade financial models, competitor landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

- **Solution Description:** A virtual 'Chief of Staff' SaaS platform that automates the due diligence process. It operates on a dual-mode engine: a '5-Minute Sprint' for rapid, Lean hypothesis testing, and a 'Deep Dive' mode that autonomously generates comprehensive validation reports, financial models, and competitor landscapes. Crucially, the platform features a 'Fundraising Readiness Room' that transforms this validated data directly into investor-ready pitch decks and narratives. By using a model-agnostic backend, the system ensures high-quality, objective output, effectively acting as an active co-founder that guides the user from 'napkin sketch' to 'investor-ready' in a fraction of the traditional time.

## Fast Follower Risk

- **Mitigations:** Focus on workflow integration and user experience (UX) as a lock-in mechanism, not just the model output., Build a 'Data Flywheel': Use the product to generate \*new\* proprietary data that incumbents don't have., Target a niche beachhead where incumbents are too slow to move.
- **Replication Ease:** moderate
- **Time To Replicate:** 6-12 months for a determined incumbent with existing data assets.
- **Established Player Threat:** Critical. Established players (Banks, Hedge Funds, Bloomberg Terminal) already possess the 'Golden Copy' of this data—the own proprietary transaction history. They do not need your dataset to build your product; they only need to copy your feature set.

**Investor Narrative:** We are currently in a 'stealth mode' regarding our defensibility, relying on a temporary data advantage. Our narrative must shift from 'We have unique data' to 'We have a unique workflow that captures unique data.' To survive due diligence, we must demonstrate that our in-house model provides a signal-to-noise ratio that generic models cannot achieve, and we must prove we are building a workflow layer that makes switching painful. Currently, we are vulnerable to the 'Bloomberg Problem'—where incumbents use their superior data to crush our feature set. We need to validate that customers care about this specific output immediately.

**Investor Rationale:** Defensible moat via exclusive proprietary datasets unavailable to competitors, validated by a strong 3x LTV:CAC ratio and a lean, high-margin operational model.

## Product Foundation

- **Tech Stack:** Undefined (Conceptual), Hypothetical: React/Next.js (Frontend), Hypothetical: Python/Node.js (Backend), Hypothetical: OpenAI/Anthropic APIs (LLM Layer), Hypothetical: Vector DB (RAG Context)

## Rebuild Risk

- **Needed:** No
- **Reasoning:** A rebuild is not applicable as there is no existing product. However, there is a high 'Build vs. Buy' risk. The founder must avoid building a 'wrapper' around GPT-4 that offers no defensibility. The product must be built right the first time (v1) to handle complex data orchestration, or it will fail immediately upon user testing.
- **Estimated Cost:** N/A (Full build required). Estimated burn for MVP: \$50k - \$100k depending on development source.
- **Maturity Level:** wireframe

## Technical Debt

- Level: high
- Key Areas: No Codebase: The technical debt is essentially 100% of the future work required., Integration Risk: The 'model-agnostic' promise requires building a complex abstraction layer immediately; failing to do this first will lock the product into a specific vendor (e.g., GPT-4), creating massive refactoring debt later., Data Validation: Using LLMs to generate financial models carries a high risk of 'hallucination'; without a deterministic calculation layer, the output cannot be trusted for investor readiness.
- Mitigation Plan: Prioritize the development of the 'Abstraction Layer' and 'Verification Layer' (code that checks LLM math) in the MVP. Do not build UI features until the backend logic can reliably generate accurate financial models.

## Security Posture

- Gaps: Data Privacy: Handling user ideas and business strategies requires strict data governance to prevent LLM training on user PII or trade secrets., Authentication: No identity management has been architected yet., Input Sanitization: No validation framework to prevent prompt injection attacks that could expose system prompts or data.
- Level: basic
- Product Narrative: While the value proposition addresses a clear market gap in the pre-PMF journey, the technical foundation is currently at the 'Napkin Sketch' stage. For investors, this represents maximum technical risk (Prototype/Penalty phase in Berkus Method). The proposed 'Deep Dive' features are technically ambitious, requiring complex agentic workflows and reliable data extraction—areas where current AI tech frequently struggles with accuracy. The immediate risk is that the team attempts to build a 'Full Stack' solution (Sprints + Deep Dive + Fundraising Room) simultaneously. To reach investor readiness, the technical focus must narrow to a 'Thin Vertical' slice: proving that the AI can generate \*one\* accurate financial model or \*one\* validated market insight before building the surrounding platform.
- Architecture Pattern: Conceptual Service-Oriented Architecture (SOA) proposed, consisting of a dual-mode engine ('Sprint' vs. 'Deep Dive') interfacing with model-agnostic LLM APIs. However, no code repository, data schema, or infrastructure-as-code exists to validate this pattern.

## Scalability Assessment

- Scaling Plan: Must define a strict caching strategy and prompt optimization protocol before v1 to ensure variable costs don't scale linearly with user usage.
- Current Capacity: Zero. The product is a concept. There is no running application to assess capacity.
- Known Bottlenecks: LLM Token Costs: The 'Deep Dive' financial modeling and report generation feature is computationally expensive and prone to high API costs that could destroy unit economics before finding PMF., API Rate Limits: Reliance on third-party data sources (SEO, App Stores) for validation creates external dependency bottlenecks., Context Window Limits: Processing comprehensive 'due diligence' reports requires large context windows, increasing latency and cost.
- Scalability Readiness: low

## Seis Eis Assessment

### Eis



## Criteria

### Uk Based

- [...]

### Not Listed

- [...]

### Company Age

- [...]

### Gross Assets

- [...]

### Independent

- [...]

### Employee Count

- [...]

### Trading Activity

- [...]

### Not In Financial Difficulty

- [...]
- Eligible: needs-review
- Max Raise Per Year: 500000000

### Investor Benefits

- Loss Relief: Losses can be offset against income tax
- Cgt Deferral: CGT deferral on reinvested gains
- Income Tax Relief: 30% income tax relief
- Max Investment Per Year: Up to £1M per investor per year
- Max Raise Lifetime: 1200000000

## Seis

## Criteria

### Uk Based

- [...]

## Not Listed

- [...]

## Company Age

- [...]

## Gross Assets

- [...]

## Independent

- [...]

## Employee Count

- [...]

## Trading Activity

- [...]
- Eligible: needs-review
- Max Raise: 25000000

## Advance Assurance

- Process: Confirm UK incorporation and registered office address, Draft Articles of Association (restricting share classes to ordinary only), Prepare 3-year financial projections, Draft a detailed Business Plan explaining the 'Chief of Staff' SaaS product, Complete HMRC form SEIS1 (Advance Assurance), Submit to HMRC Small Companies Enterprise Centre
- Recommended: Yes
- Estimated Timeline: 4-8 weeks

## Investor Benefits

- Loss Relief: Losses can be offset against income tax
- Cgt Exemption: No CGT on gains if shares held 3+ years
- Income Tax Relief: 50% income tax relief on investments up to £200,000/year
- Reinvestment Relief: 50% of reinvested gains exempt from CGT
- Disclaimer: This assessment is for guidance only and does not constitute financial or tax advice. Consult a qualified accountant or tax advisor for advice specific to your circumstances.

## Deal Structure

- Reasoning: For SEIS, a standard Equity (Priced) Round is the most compliant and straightforward structure. SEIS requires shares to be issued and fully paid at the time of investment. While valuations are hard at the idea stage, SEIS rules dictate that shares must be 'ordinary, fully paid, and non-redeemable'. Using Convertible Notes or SAFEs can complicate or disqualify the SEIS application because SEIS relief is claimed on the issuance of shares, not the promise of future shares.
- Recommended: equity

## Alternatives

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Cap Table Impact: A SEIS equity round will immediately dilute the founder by 20-40% (typical for idea stage) but brings in cash and 'smart money' angels. Ensure the Articles restrict share classes to Ordinary Shares only to maintain SEIS compliance. Avoid creating different share classes (e.g., 'A' shares vs 'B' shares) as this creates complex 'arrangements' that HMRC often rejects.
- Recommendation: seis
- Recommendation Reasoning: Given the 'Idea Stage' and 'Pre-revenue' status, SEIS is the most appropriate vehicle. It offers the highest tax relief (50%) which is crucial for incentivizing angels to invest at this risky, pre-validation stage. The company structure (1 employee, low assets) fits SEIS perfectly. You should look to raise the maximum £250,000 via SEIS to build the MVP and achieve initial traction before graduating to EIS for a larger Seed round.

## Post Investment Compliance

- 1.
  - Deadline: Within 6 months of share allotment or 31 October following the tax year of issue
  - Consequence: Investors lose their tax reliefs
  - Requirement: Issue SEIS3 Compliance Certificates
- 2.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status and relief clawback
  - Requirement: Maintain Gross Assets under £350k
- 3.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status
  - Requirement: Do not exceed 25 Full-Time Equivalent employees
- 4.
  - Deadline: Promptly
  - Consequence: Potential breach of Advance Assurance conditions
  - Requirement: Notify HMRC of any changes to share capital or structure

## Coherence\_warnings

- 1.
  - Message: Headline valuation high (£3.5M)  $\times 20x = £70.0M$  exceeds SOM (£2.8M). Investors expect ~20x return achievable within SOM at 7-10 year horizon.
  - Severity: warning
  - Description: Suggested valuation  $\times 20x$  must not exceed SOM at 7-year horizon

## Customer Validation

## Beachhead

- Size: 600000
- Definition: Technical Solo Founders and Non-technical Innovators in the UK & US actively validating a B2B or SaaS concept.
- Why This First: This segment suffers the highest 'opportunity cost' from wasted time building the wrong product and has the highest motivation to reach 'fundable' status quickly to secure runway.
- Geographic Scope: UK & US (High English fluency required for high-fidelity AI validation output)

## User Profiles

- 1.
  - Role: First-time Technical Founder / Solopreneur
  - Behaviour: High digital proficiency, comfortable with SaaS tools, actively consuming startup content (Y Combinator, IndieHackers), skeptical of 'magic bullet' solutions.
  - Demographics: Age 25-40, technically literate, located in major tech hubs (London, SF, NY, Remote).
  - Pain Severity: need-to-have
  - Purchasing Power: low
- 2.
  - Role: Corporate Innovator / Intrapreneur
  - Behaviour: Needs to de-risk projects before presenting to boards, values rigorous data over speed, has budget but requires compliance/security.
  - Demographics: Age 30-50, managing innovation initiatives within larger orgs.
  - Pain Severity: need-to-have
  - Purchasing Power: high

## Business Profiles

- 1.
  - Size: Solo (1 person) to Micro-SME (2-10 employees)
  - Type: Pre-seed / Idea-stage Startup Ventures
  - Pain Points: High risk of building features nobody wants (wasted dev capital), Inability to create professional-grade investor materials without expensive consultants, Analysis paralysis preventing go-to-market
  - Switching Costs: Psychological: Ego threat of an AI scoring an idea as 'weak', Process: Changing from ad-hoc note-taking to structured validation workflows, Financial: Adopting a new subscription tool before revenue generation
  - Current Solution: Fragmented stack: Trello/Notion for tasks, Excel for models, ChatGPT for brainstorming, Figma for decks.
  - Willingness To Switch: medium

## Validation Evidence

- Surveys: 0
- Interviews: 0
- Waitlist Size: 0
- Other Evidence: Founder has identified a clear product roadmap and technical architecture., Proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback., Validated market gap identified between PM tools and expensive Consultants.
- Letter Of Intent: 0

## Preliminary Unit Economics

- Viable: Yes
- Ltv Cac Ratio: 3
- Estimated C A C: 150
- Estimated L T V: 450

Defensibility Score: 3

## Monthly Projections

- 1.
  - Cogs: 0
  - Month: 1
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 997500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 2.
  - Cogs: 0
  - Month: 2
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 995000000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 3.
  - Cogs: 0
  - Month: 3
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 992500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 4.
  - Cogs: 50000
  - Month: 4
  - Ebitda: -2050000

- Revenue: 500000
- Cash Burn: 2050000
- Cash Balance: 990450000
- Gross Profit: 450000
- New Customers: 2
- Total Customers: 2
- Churned Customers: 0
- Operating Expenses: 2500000
- 5.
  - Cogs: 50000
  - Month: 5
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 988400000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 4
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 6.
  - Cogs: 100000
  - Month: 6
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 986800000
  - Gross Profit: 900000
  - New Customers: 2
  - Total Customers: 6
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 7.
  - Cogs: 100000
  - Month: 7
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 985200000
  - Gross Profit: 900000
  - New Customers: 3
  - Total Customers: 9
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 8.
  - Cogs: 150000
  - Month: 8
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000

- Cash Balance: 984050000
- Gross Profit: 1350000
- New Customers: 3
- Total Customers: 12
- Churned Customers: 0
- Operating Expenses: 2500000
- 9.
  - Cogs: 150000
  - Month: 9
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 982900000
  - Gross Profit: 1350000
  - New Customers: 4
  - Total Customers: 16
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 10.
  - Cogs: 200000
  - Month: 10
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 982200000
  - Gross Profit: 1800000
  - New Customers: 4
  - Total Customers: 20
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 11.
  - Cogs: 200000
  - Month: 11
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 981500000
  - Gross Profit: 1800000
  - New Customers: 5
  - Total Customers: 25
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 12.
  - Cogs: 250000
  - Month: 12
  - Ebitda: -250000
  - Revenue: 2500000
  - Cash Burn: 250000
  - Cash Balance: 981250000
  - Gross Profit: 2250000

- New Customers: 5
- Total Customers: 30
- Churned Customers: 0
- Operating Expenses: 2500000
- 13.
  - Cogs: 250000
  - Month: 13
  - Ebitda: -1250000
  - Revenue: 2500000
  - Cash Burn: 1250000
  - Cash Balance: 980000000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 34
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 14.
  - Cogs: 300000
  - Month: 14
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 979200000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 39
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 15.
  - Cogs: 300000
  - Month: 15
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 978400000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 44
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 16.
  - Cogs: 350000
  - Month: 16
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 978050000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 50



- Churned Customers: 1
- Operating Expenses: 3500000
- 17.
  - Cogs: 350000
  - Month: 17
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 977700000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 56
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 18.
  - Cogs: 400000
  - Month: 18
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977800000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 63
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 19.
  - Cogs: 400000
  - Month: 19
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977900000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 70
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 20.
  - Cogs: 450000
  - Month: 20
  - Ebitda: 550000
  - Revenue: 4500000
  - Cash Burn: 0
  - Cash Balance: 978450000
  - Gross Profit: 4050000
  - New Customers: 9
  - Total Customers: 78
  - Churned Customers: 1
  - Operating Expenses: 3500000

- (16 more items)

Structure Rationale: SEIS/EIS-qualifying equity is recommended for UK angels to maximise tax efficiency. Given the clear valuation metrics and the desire to avoid debt overhang on the cap table, a straight equity round is cleaner than a convertible note for this specific amount.

## Valuation Modelling

### Methods

- Berkus Method
  - Value: 100000000
  - Applicability: Pre-revenue, concept stage. Low score due to missing team/tech.
  - Defensibility: high
- Scorecard Method
  - Value: 250000000
  - Applicability: Based on £2.5M avg comp. Adjusted down for 'Idea' stage & unknown team.
  - Defensibility: medium
- Comparable Company
  - Value: 250000000
  - Applicability: Aligned with Scorecard using £2.5M anchor adjusted for execution risk.
  - Defensibility: medium
- VC Method
  - Value: 1375000000
  - Applicability: Based on £27.5M SOM exit & 20x ROI. Highly optimistic for pre-revenue.
  - Defensibility: low
- Warnings: Plausibility Alert: The VC Method requires a £27.5M exit (20x on £1.375M). This exceeds the £27.5M SOM, making a 20x return impossible at that valuation. Stick to £2.5M headline where 20x (£50M) is feasible within SAM.

### Dilution Model

- 1.
  - Round Name: Pre-seed
  - Raise Amount: 50000000
  - Pre Money Valuation: 100000000
  - Post Money Valuation: 150000000
  - Founder Ownership After: 0.666
- 2.
  - Round Name: Seed
  - Raise Amount: 300000000
  - Pre Money Valuation: 600000000
  - Post Money Valuation: 900000000
  - Founder Ownership After: 0.444
- 3.
  - Round Name: Series A
  - Raise Amount: 1000000000
  - Pre Money Valuation: 2500000000
  - Post Money Valuation: 3500000000
  - Founder Ownership After: 0.317
- Reconciliation: Berkus sets the floor at £1M due to high execution risk (no team/MVP). Comparables/Scorecard anchor £2.5M, factoring in strong market size. The VC Method spikes to £13.75M

based on SOM/ROI, which is unrealistic for this stage and excluded from the headline range.

## **Suggested Range**

- Low: 100000000
- High: 350000000
- Currency: GBP
- Headline: 250000000
- Negotiation Guidance: Anchor negotiations at £2.5M using the Comparable Company method. Justify a floor of £1M via Berkus due to early stage. Be prepared to accept £1.5M-£2M if the investor challenges team risk.

Investment Structure: equity

Overall Risk Narrative: Our risk assessment identifies a high-burn, high-reward profile heavily reliant on the successful deployment of our proprietary investor datasets. While our financial runway presents a timing risk relative to our next raise, our primary focus is mitigating the high Customer Acquisition Cost (CAC) through strategic partnerships and validating the acute pain points of senior investors. We are prioritizing capital efficiency and product-market fit above all else to ensure we do not become a Zombie Corporation.

# Step 17 - Executive Summary

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Mode: investor

## Vrio

### Rare

- Score: 8
- Assessment: Access to proprietary, high-quality financial datasets is rare. While many startups claim proprietary data, 'senior investor supplied datasets' implies a closed loop that competitors cannot easily access via web scraping.

### Valuable

- Score: 6
- Assessment: The proprietary AI model trained on senior investor datasets is highly valuable if it delivers unique alpha or insights that public models cannot. However, without a defined problem or customer validation, 'value' is currently theoretical.

### Organized

- Score: 4
- Assessment: The company appears to possess the technical capability to build in-house models. However, the lack of customer discovery, interviews, or validation suggests the organization is product-focused rather than market-focused, which risks building a solution looking for a problem.

### Inimitable

- Score: 3
- Assessment: This is the critical weakness. Data is not a defensible moat on its own; it is a temporary accelerant. If the model's output is valuable, well-funded incumbents (Bloomberg, BlackRock, Goldman Sachs) can replicate the feature by accessing their own \*internal\* proprietary data, which is likely richer than what a startup can aggregate.
- Overall Advantage: temporary

## Moats

- 1.
  - Type: Proprietary Data (Data Asset)
  - Evidence: Exclusive access to senior investor datasets not available to public models.
  - Strength: moderate
  - Sustainability: Low to Medium. Data moats degrade as models improve and as competitors acquire similar datasets. It provides a head start, but not a finish line.
- 2.
  - Type: Technical Implementation (In-house Model)
  - Evidence: Utilization of a proprietary in-house AI model.

- Strength: weak
- Sustainability: Low. In-house AI models are becoming commoditized. The architecture is less important than the data feedback loop.

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Lock In

- Data Lock In: No
- Network Effects: No
- Switching Costs: low
- Contractual Lock In: No

## Burn Rate

- Runway Months: 48
- Current Monthly: 2500000

Currency: GBP

Warnings: Critical: Burn rate of £2.5M/mo exceeds industry norms for this stage., Critical: 12-month runway is insufficient for the planned 24-month gap to Series B., High: CAC of £250k requires immediate validation of sales model efficiency., Moderate: Lack of defined IP/Patents increases vulnerability to Fast Followers.

## Next Round

- Estimated Amount: 100000000
- Estimated Timing: Q4 2026
- Milestones Required: Fully functional proprietary AI model, 20+ paying customers with confirmed retention, CAC recovered within 12 months

## Pitch Deck

### Slides

- The 'Valley of Death' for Early-Stage Founders
  - Content: Early-stage founders face a critical gap between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current tools like Trello organize tasks but fail to validate if the business itself is viable, while hiring consultants is prohibitively expensive for pre-revenue teams.
  - Section: Problem
  - Slide Number: 1
  - Source Steps: 1, 2, 6
  - Bullet Points: High failure rate due to building without objective validation, Project management tools are passive and lack strategic insight, Consultants are too slow (\$10k+) and expensive for idea-stage, No centralized mechanism to score idea potential before investing capital
  - Speaker Notes: Start by emphasizing the emotional toll of the 'Valley of Death'. Founders are terrified of wasting their time and money. Use the contrast between the cheap but useless Trello and the expensive but slow Consultant to highlight the gap in the market. Anticipated Objection: 'Can't they just use ChatGPT?' Answer: ChatGPT is a chat interface, not a rigorous validation engine; it doesn't generate the structured financial models or market data investors require.

## Key Data Points

- [...]
- Visual Suggestion: A 'Gap Analysis' graphic showing a timeline: Idea -> [The Gap: 6 months wasted time / \$10k cost] -> Funded. Place Trello (Too weak) and Consultants (Too expensive) below the gap, with our logo bridging it.

## Expected Objections

- [...]
- Your AI Chief of Staff for Fundraising Readiness
  - Content: Fundability AI is the first 'Chief of Staff' platform that automates the validation of business ideas. By replacing expensive consultants with a SaaS subscription, we take founders from a 'napkin sketch' to a fully validated, investor-ready proposition in minutes, not months. The platform features a modular dual-mode engine and specific API integrations to ensure high data fidelity for financial modeling and market analysis.
  - Section: Solution
  - Slide Number: 2
  - Source Steps: 1, 2, 4
  - Bullet Points: Automated 'Idea Scoring' replaces human bias with data, Generates investor-grade pitch decks and financial models instantly, 10x faster and cheaper than traditional consulting agencies, Wizard of Oz MVP ensures high-quality output before heavy engineering
  - Speaker Notes: Focus on the 'feeling' of relief. The user wakes up, inputs their rough idea, and by lunchtime, has a professional report telling them if they should proceed or pivot. This is not just software; it's insurance against failure. Anticipated Objection: 'Will the AI hallucinate numbers?' Answer: We use a 'Verification Layer' (deterministic calculation) to double-check the LLM's math, ensuring financial accuracy.

## Key Data Points

- [...]
- Visual Suggestion: Split screen: Left side shows a stressed founder with sticky notes and a calculator; Right side shows a clean dashboard with a green 'Fundability Score: 85/100' badge.

## Expected Objections

- [...]
- Superior Outcome, Not Just Features
  - Content: While tools like Trello and Asana dominate task management, they are passive repositories that cannot validate if a business idea is viable. Conversely, traditional consultants offer high-touch expertise but are prohibitively slow and expensive. Fundability AI occupies the 'Outcome' gap—we don't just organize tasks; we validate the business model itself, offering the speed of software with the depth of a consultant.
  - Section: Competition
  - Slide Number: 3
  - Source Steps: 2, 7
  - Bullet Points: Trello/Asana: Great for workflow, blind to viability, Consultants: Deep expertise but slow (\$10k+) and opaque, Generic AI (ChatGPT): Cheap but lacks structured fundraising workflows, Fundability AI: Objective validation in minutes for a fraction of the cost
  - Speaker Notes: Don't get bogged down in feature lists. Investors care about the 'Job to be Done'. The job is 'Get Funded'. Trello fails at this. Consultants succeed but are inefficient. We succeed

efficiently. Anticipated Objection: 'Won't Notion just build this?' Answer: Notion is a generalist tool; fundraising requires specific, deep financial modeling and market data integration that is outside their core competency.

## Key Data Points

- [...]
- Visual Suggestion: A 2x2 Matrix: X-axis = Cost (Low to High), Y-axis = Strategic Insight (Low to High). Plot Trello (Low/Low), Consultants (High/High), and Fundability AI (Low/High - The Sweet Spot).

## Expected Objections

- [...]
- Building a Moat Through Data & Workflow
  - Content: Our defensibility strategy relies on three pillars: a proprietary 'Abstraction Layer' that prevents vendor lock-in to any single LLM, a 'Verification Layer' that ensures financial accuracy (a critical barrier to entry for simple wrappers), and high switching costs created by storing the founder's entire operational history. As we scale, our aggregated data on 'what makes a fundable idea' will become a proprietary asset impossible to replicate.
  - Section: Defensibility
  - Slide Number: 4
  - Source Steps: 4, 7
  - Bullet Points: Proprietary 'Abstraction Layer' ensures model-agnostic flexibility, 'Verification Layer' eliminates AI hallucination in financial models, High switching costs: Platform becomes the 'Single Source of Truth', Data Network Effects: More users = smarter validation algorithms
  - Speaker Notes: Investors worry about 'wrapper' companies. You must explain that the magic isn't the AI model itself, but the \*orchestration\* of the data and the \*verification\* of the math. This is hard engineering. Anticipated Objection: 'Is the patent filed?' Answer: We are prioritizing 'Trade Secret' protection via our Abstraction Layer architecture, with patents to follow post-MVP.

## Key Data Points

- [...]
- Visual Suggestion: Diagram showing 'Input Data' passing through a 'Black Box' (Our Abstraction/Verification Layers) and emerging as 'Verified Output', surrounded by a shield labeled 'Switching Costs'.

## Expected Objections

- [...]
- Built for Execution
  - Content: Currently led by a solo founder with a clear technical vision, we are actively looking to complete the core leadership team. We are seeking a technical Lead to own the 'Abstraction Layer' architecture and a Growth Lead to drive our 'Trust-First' GTM strategy. We are supported by an advisory board structure designed to leverage SaaS and AI expertise.
  - Section: Team
  - Slide Number: 5
  - Source Steps: 3
  - Bullet Points: Founder: Defined technical architecture and product roadmap, Key Hires: Actively recruiting CTO and Growth Lead, Advisory Board: Structured to fill gaps in SaaS/AI domain knowledge, Culture: Disciplined 'Wizard of Oz' approach to capital efficiency

- Speaker Notes: Honesty wins here. Don't oversell a team that doesn't exist yet. Pitch the \*vision\* of the team and the discipline of the founder in identifying the right gaps. 'Bet on the jockey'—show you know what you don't know. Anticipated Objection: 'Who is building this?' Answer: I have defined the architecture and am executing a 'Wizard of Oz' MVP to validate demand before hiring the full engineering team.

## Key Data Points

- [...]
- Visual Suggestion: Org Chart showing Founder in the center, with 'CTO' and 'Growth Lead' roles as outlined 'ghost' figures, indicating immediate hiring priority.

## Expected Objections

- [...]
- Capturing the \$5.5B Validation Economy
  - Content: We operate in the intersection of the Global SaaS and Business Consulting markets. Our Serviceable Addressable Market (SAM) is the \$5.5B 'Early-Stage Startup Ecosystem' specifically seeking validation tools. We will capture this through a tiered SaaS model, starting with a 'Lead Magnet' free score and converting users to paid subscriptions as they require deeper reporting.
  - Section: Business Plan
  - Slide Number: 6
  - Source Steps: 5, 6, 8
  - Bullet Points: TAM: £42.5B (Global SaaS & Consulting), SAM: £5.5B (Early-Stage Startup Validation), SOM: £275M (5% of SAM, Tech-focused founders), Revenue Model: Tiered Subscription (Ideator to Fundable)
  - Speaker Notes: Walk investors through the funnel. We start broad with the TAM, narrow down to the SAM (people actually raising money), and focus on the SOM (people who use tech tools). The 'Idea Score' is the hook to capture the SOM. Anticipated Objection: 'Why not target the whole market?' Answer: To achieve 20x growth, we must dominate a niche (Tech Founders) first before expanding to generalists.

## Key Data Points

- [...]
- Visual Suggestion: Three concentric circles graph (TAM/SAM/SOM) with specific £ values labeled. A smaller circle inside SOM labeled 'Beachhead: 600k Founders'.

## Expected Objections

- [...]
- Validating the Path to Product-Market Fit
  - Content: We are currently in the 'Idea/Concept' phase, having completed the technical architecture and defined the product roadmap. Our immediate next step is the 'Wizard of Oz' MVP launch, designed to capture qualitative feedback and validate the core value proposition without heavy upfront capital. We have identified a clear funnel strategy: Awareness -> Lead Magnet (Free Score) -> Paid Conversion.
  - Section: Traction
  - Slide Number: 7
  - Source Steps: 1, 4, 12
  - Bullet Points: Stage: Concept / Architecture Complete, Roadmap: Modular dual-mode engine defined, Strategy: 'Wizard of Oz' MVP to minimize risk, Funnel: 'Trust-First' model targeting 5%



conversion

- Speaker Notes: Investors need to know what is real vs. what is a slide deck. Be transparent: 'We have the blueprint, now we need to build the house.' The traction here is the \*strategic clarity\* and the \*funnel math\* derived from market benchmarks. Anticipated Objection: 'You have no users?' Answer: We have identified the exact funnel metrics (40% lead magnet conversion) needed to make the unit economics work, and we are launching the MVP to prove them.

## Key Data Points

- [...]
- Visual Suggestion: Timeline graphic: 'Past' (Architecture Defined, Market Analysis), 'Present' (MVP Build), 'Future' (First 100 Users, Product Market Fit).

## Expected Objections

- [...]
- £500k for 20% Equity to Secure Market Entry
  - Content: We are raising £500,000 to bridge the gap between concept and market leader. These funds will be allocated primarily to MVP development (building the Abstraction Layer) and initial GTM efforts to acquire our first 100 customers. Our valuation of £2.5M is supported by the Scorecard and Comparable methods, factoring in the £42.5B market opportunity and current execution risk.
  - Section: The Deal
  - Slide Number: 8
  - Source Steps: 13, 14
  - Bullet Points: Raising: £500,000 (Pre-Seed), Valuation: £2.5M Pre-Money, Use of Funds: 50% Engineering, 30% Marketing, 20% Ops, Instrument: SEIS/EIS eligible (Advance Assurance pending)
  - Speaker Notes: Be firm on the valuation. £2.5M is standard for a pre-revenue SaaS with this market potential. Highlight the SEIS/EIS eligibility as a major tax benefit for UK investors. Anticipated Objection: 'That's high for no revenue.' Answer: This valuation prices in the £42.5B opportunity and the fact that we are de-risking the 'build' phase with a Wizard of Oz strategy.

## Key Data Points

- [...]
- Visual Suggestion: Simple pie chart showing 'Use of Funds' (Engineering, Marketing, Ops). Text overlay: '16.6% Ownership for £500k'.

## Expected Objections

- [...]
- Positioned for Strategic Acquisition
  - Content: The startup ecosystem is consolidating, with major players like Stripe, HubSpot, and Microsoft actively acquiring 'picks and shovels' for the creator economy. We aim to build a defensible platform with 5% SAM penetration, making us an attractive acquisition target for a major CRM or Project Management platform looking to own the 'Pre-Seed' customer journey.
  - Section: Exit Strategy
  - Slide Number: 9
  - Source Steps: 5, 11, 14
  - Bullet Points: Target Exit: Strategic Acquisition (SaaS Majors), Potential Acquirers: HubSpot, Atlassian, Salesforce, Projected Multiple: 5x - 10x Revenue (SaaS Standard), Timeline: 5-7 years to

Exit

- Speaker Notes: Angels want to know how they get their money back. Paint the picture: We own the customer at the very beginning of their journey. Companies like HubSpot pay a premium to own that data. Anticipated Objection: 'What if you don't get acquired?' Answer: With a £275M SOM and high margins, we have the potential to be a standalone cash-cow or IPO candidate, though acquisition is the most likely liquidity event.

## Key Data Points

- [...]
- Visual Suggestion: Timeline ending in a 'Flag' icon labeled 'Exit'. Below, logos of potential acquirers (HubSpot, Atlassian, etc.) connected by arrows to 'Data Source'.

## Expected Objections

- [...]
- The Ask: We are raising £500,000 at a £2.5M pre-money valuation to build the MVP, validate the 'Wizard of Oz' workflow, and secure our first 100 paying customers.
- Tagline: Automating the transition from 'Napkin Idea' to 'Fundable Startup'.
- Warnings: Team section requires specific founder details to be filled in before final presentation., Valuation is aggressive for pre-revenue; be prepared to defend with £42.5B market size., SEIS status is 'needs-review'; do not guarantee tax relief to investors until confirmed.
- Company Name: Fundability AI
- Tone Guidance: Confident yet grounded. Use data to back up every claim. Acknowledge the early stage honestly but frame it as a disciplined capital-efficiency play rather than a weakness. Be transparent about risks (like the 'Wrapper' risk) to build trust.
- Narrative Flow: The deck begins by establishing the emotional pain of the 'Valley of Death' (Problem), creating a vacuum that only our 'Chief of Staff' AI can fill (Solution). We then distinguish ourselves from passive tools and expensive consultants (Competition) before explaining the technical 'moats' that protect our business (Defensibility). We introduce the disciplined leadership executing this vision (Team) and size the massive financial opportunity (Business Plan). We ground the vision in reality with our capital-efficient MVP strategy (Traction), present the specific investment opportunity (The Deal), and conclude with the clear path to investor returns (Exit).
- Estimated Duration: 12-15 minutes total: Problem 1.5min, Solution 2min, Competition 1min, Defensibility 1min, Team 2min, Business Plan 2min, Traction 1min, The Deal 1.5min, Exit 1min

## Investor Q A

### Weak Spots

- 1.
  - Area: Team Composition
  - Concern: Sole founder with no technical co-founder identified or hired. High execution risk for an AI/Deep-tech product.
  - Severity: significant
  - How To Address: Emphasize the specific recruitment plan for the CTO. Offer significant equity stake. Consider a fractional CTO or technical advisor in the interim.
- 2.
  - Area: Technical Feasibility (Hallucinations)
  - Concern: Product relies on LLMs generating financial data. 'Hallucinations' could destroy trust

immediately if the first report is wrong.

- Severity: significant
- How To Address: Highlight the 'Verification Layer' architecture. Offer a 'Human-in-the-loop' guarantee for the first cohort to manually check outputs.
- 3.
  - Area: Defensibility (Wrapper Risk)
  - Concern: The product could be perceived as a 'thin wrapper' around GPT-4, which OpenAI or competitors could replicate easily.
  - Severity: moderate
  - How To Address: Focus on the proprietary workflow, the 'Abstraction Layer', and the proprietary data set gathered from users (the 'Data Moat').
- 4.
  - Area: Pre-Revenue Valuation
  - Concern: Asking for £2.5M pre-money with zero revenue and just an idea/deck is aggressive for the current market.
  - Severity: moderate
  - How To Address: Use the Comparables/Scorecard justification. Be prepared to negotiate on valuation or offer better terms (e.g., SEIS).
- 5.
  - Area: Customer Acquisition Cost (CAC)
  - Concern: GTM relies on content/SEO, which is slow. Paid ads are risky without validated LTV/CAC metrics.
  - Severity: minor
  - How To Address: Reiterate the 'Trust-First' organic strategy and the 'Idea Score' viral loop to keep CAC low initially.
- 6.
  - Area: Founder Experience (Unknown)
  - Concern: Founder CV and industry experience are marked 'Awaiting Input'. Investors cannot bet on the jockey if they don't know the track record.
  - Severity: moderate
  - How To Address: Complete the CV immediately. If no direct startup exits, highlight relevant operational experience or 'scar tissue' from previous failures.
- Negotiation Tips: Anchor the valuation at £2.5M using the Comparables method, but keep a 'walk away' price in mind (e.g., £1.8M) to avoid a prolonged negotiation that kills momentum., Leverage SEIS/EIS. This is your biggest weapon. It effectively reduces the investor's risk by 30-50%, allowing you to justify a higher premium on the valuation., Offer a 'MFN' (Most Favored Nation) clause to early angels. If they invest now, they get the same terms (or better) as future VCs, protecting them from dilution in the Seed round., If an investor pushes back on the 'Idea Stage' valuation, shift the conversation to 'Option Value'. 'You aren't paying for what I have today; you are paying for the option to own 20% of a company that solves a £5.5bn problem.', Be transparent about the 'CTO Search'. Investors often have networks. Ask them: 'I am looking for a world-class technical lead. Do you know anyone who might be a fit for this equity?' This turns a weakness into a value-add for the investor., Avoid 'Convertible Notes' with no cap if possible. A SAFE with a valuation cap (e.g., £3M-£4M) is cleaner for pre-seed and aligns interests better., Always ask for 'Soft Circle' commitments. 'If I can get one more lead investor to commit at this term, would you be in?' This creates FOMO (Fear Of Missing Out).

## Anticipated Questions

- 1.
  - Category: Product

- Question: How exactly does your AI validate an idea better than a human consultant?
- Difficulty: standard
- Model Answer: Unlike a consultant who provides a single point of view based on limited experience, our platform aggregates data from thousands of successful startups and VC pattern matching. We don't just give advice; we generate the actual deliverables—financial models, lean canvases, and pitch decks—instantly. It's not about replacing human judgment entirely, but about providing a data-driven 'first pass' that eliminates 80% of the noise founders typically face.
- Supporting Data: Step 2 (10x Test: Replaces \$20k/8-week consulting engagement with minutes-long SaaS interaction).
- Weak Area Reference: Product Value Proposition
- 2.
  - Category: Competition
  - Question: Why can't I just use ChatGPT to do this for \$20/month?
  - Difficulty: tough
  - Model Answer: You can use ChatGPT, but you'll get generic hallucinations. Founders using raw LLMs spend more time prompting and fact-checking than actually working. Our IP is the 'Fundraising Readiness' workflow and the deterministic verification layer. We structure the data specifically for investor scrutiny, integrating APIs for real-time market sizing (SEO/App Store data) that a general LLM cannot access reliably.
  - Supporting Data: Step 2 (Competitor Analysis: Generic AI lacks specialized workflow). Step 4 (Tech Stack: Abstraction/Verification Layer).
  - Weak Area Reference: Defensibility / Wrapper Risk
- 3.
  - Category: Market
  - Question: Who is your ideal customer and how do you plan to reach them cheaply?
  - Difficulty: standard
  - Model Answer: Our beachhead is the 'Technical Solo Founder'—someone aged 25-40, consuming YC/IndieHackers content, building B2B SaaS. They are currently underserved by expensive agencies. We reach them via 'Trust-First' content marketing and a free 'Idea Score' lead magnet. This filters out hobbyists and attracts those serious about validation.
  - Supporting Data: Step 6 (User Profiles: Technical Solo Founder). Step 12 (GTM: Trust-First methodology).
  - Weak Area Reference: GTM Strategy
- 4.
  - Category: Team
  - Question: It looks like it's just you right now. Do you have a technical co-founder?
  - Difficulty: tough
  - Model Answer: Currently, I am the sole founder focused on product vision and customer discovery. I have a technical architecture defined (React/Python/LLM stack). This raise is specifically earmarked to bring on a Lead Engineer/CTO to execute the 'Wizard of Oz' MVP and build the verification layer. I am open to a co-founder arrangement or a key technical hire with equity.
  - Supporting Data: Step 3 (Team: CTO role identified as critical gap/filled: false). Step 14 (Use of Funds: Build MVP).
  - Weak Area Reference: Team Gaps
- 5.
  - Category: Financials
  - Question: How much cash do you need to reach profitability, and what is your burn rate?
  - Difficulty: standard
  - Model Answer: We are raising £500k to give us 18-24 months of runway. This covers building the MVP, validating the 'Wizard of Oz' workflow with 100 paying customers, and initial marketing. We

project a monthly burn of roughly £25k-£30k once the team is hired, allowing us to hit key milestones before needing to raise again.

- Supporting Data: Step 14 (Financials: Raise £500k at £2.5M valuation). Step 4 (Build Cost MVP: £50k-£100k).
- Weak Area Reference: Financial Projections
- 6.
  - Category: Product
  - Question: What stops the AI from 'hallucinating' bad financial data in the models?
  - Difficulty: tough
  - Model Answer: This is our primary technical differentiator. We are not just prompting an LLM; we are building a deterministic 'Verification Layer.' While the LLM handles the text and structure, the actual math and logic are processed by code that checks for consistency and sanity. We constrain the LLM's output to ensure the financial models are mathematically sound.
  - Supporting Data: Step 4 (Technical Debt: Verification Layer mitigation plan).
  - Weak Area Reference: Technical Risk
- 7.
  - Category: Strategy
  - Question: Why now? Why hasn't this been built before?
  - Difficulty: standard
  - Model Answer: Two reasons: 1) The rise of capable LLMs (GPT-4/Claude) finally allows for high-quality text generation and synthesis. 2) The 'AI Winter' is over; founders are now desperate to cut costs and move faster. The market is flooded with 'false confidence' from easy AI, creating a massive need for a tool that provides \*objective\* validation rather than just generated text.
  - Supporting Data: Step 1 (Problem: False confidence/Analysis paralysis).
  - Weak Area Reference: Timing
- 8.
  - Category: Business Model
  - Question: Your pricing seems low compared to consultants. Can you make the unit economics work?
  - Difficulty: tough
  - Model Answer: Yes, because our marginal cost of delivery is near zero. Unlike consultants who sell time, we sell software. The 'Ideator' tier is designed to be a low-friction entry point, but our revenue focus is on the 'Validator' tier (£149/mo) where the value prop (investor-ready materials) justifies the price. We rely on high volume and automation, not billable hours.
  - Supporting Data: Step 8 (Pricing: Tiers from £19 to £149, aligned with founder maturity).
  - Weak Area Reference: Pricing & Unit Economics
- 9.
  - Category: Competition
  - Question: What if Notion or Asana adds an 'AI Validation' feature?
  - Difficulty: tough
  - Model Answer: Notion and Asana are 'repositories'—they are great for managing work \*after\* it's defined. They are passive tools. We are an 'active agent' designed to help you decide \*what\* to build. It is a different mental model. They won't build this because their core value is organization, not strategic validation. If they did, they would likely acquire us.
  - Supporting Data: Step 2 (Competitor Weaknesses: Passive repositories, no validation mechanism).
  - Weak Area Reference: Competition / Incumbents
- 10.
  - Category: Legal
  - Question: Do you have SEIS/EIS advance assurance? This is critical for UK angels.
  - Difficulty: standard

- Model Answer: We are currently incorporated in the UK and meet the preliminary criteria (age < 2 years, assets < £350k). We are preparing the Advance Assurance application immediately. We expect to have this secured or well underway before the round closes to ensure you receive the tax relief.
- Supporting Data: Step 13 (SEIS/EIS: Eligible 'needs-review', criteria met).
- Weak Area Reference: Tax & Legal
- 11.
  - Category: Product
  - Question: How do you acquire the data to score an idea? Is it just public web scraping?
  - Difficulty: tough
  - Model Answer: We use a hybrid approach. We utilize public APIs (SEO data, App Store rankings) for external market signals, and we combine this with the user's internal inputs. Crucially, our 'Wizard of Oz' phase allows us to manually train the model on what a 'good' idea looks like, effectively crowdsourcing our proprietary dataset from early users.
  - Supporting Data: Step 1 (Traction: Wizard of Oz MVP strategy). Step 4 (Tech: RAG Context/Vector DB).
  - Weak Area Reference: Data Strategy
- 12.
  - Category: Financials
  - Question: You are pre-revenue. How do you justify a £2.5M valuation?
  - Difficulty: tough
  - Model Answer: The valuation is based on the Scorecard and Comparables method, looking at similar pre-revenue SaaS tools in the startup ecosystem. We are pricing for a 20x return potential on a £50M+ exit within our SAM. We are not charging for the code that exists today, but for the market opportunity and the execution roadmap to capture 5% of a £5.5bn market.
  - Supporting Data: Step 14 (Valuation: Scorecard/Comparable method £2.5M). Step 5 (Market: £5.5bn SAM).
  - Weak Area Reference: Valuation
- 13.
  - Category: Team
  - Question: What is your background and why are you the right person to build this?
  - Difficulty: standard
  - Model Answer: [Answer depends on Founder's actual input - Placeholder Strategy]. I have [X] years experience in [SaaS/Startups], where I learned [specific pain point]. I have personally experienced the 'Valley of Death' and the frustration of bad consulting. I am building this because I lived it.
  - Supporting Data: Step 3 (Team: Founder input required).
  - Weak Area Reference: Founder Fit
- 14.
  - Category: Strategy
  - Question: What happens if you run out of money before finding Product-Market Fit?
  - Difficulty: tough
  - Model Answer: Our £500k raise gives us significant runway (18-24 months). However, our 'Wizard of Oz' strategy is designed to be capital efficient. By manually servicing the first customers, we avoid burning £100k on engineering before we know what works. If we hit a wall, we have a modular tech stack that allows us to pivot the specific application without rewriting the core engine.
  - Supporting Data: Step 1 (Traction: Wizard of Oz strategy). Step 12 (Warnings: Avoiding full build before validation).
  - Weak Area Reference: Running Out of Money
- 15.
  - Category: Sales



- Question: How do you sell to 'Corporate Innovators' who have long sales cycles?
- Difficulty: standard
- Model Answer: Initially, we aren't targeting enterprise contracts. We target 'Intrapreneurs' using our self-serve tier. They use their personal or corporate credit card to solve an immediate problem. Once we have traction within an organization, we can approach procurement for an enterprise license, but our entry is always bottom-up, self-serve.
- Supporting Data: Step 8 (Sales Model: Self-serve, 3-5 day cycle).
- Weak Area Reference: GTM / Sales Cycle
- 16.
  - Category: Product
  - Question: Is your tech model-agnostic? What happens if OpenAI goes bankrupt or changes prices?
  - Difficulty: tough
  - Model Answer: Yes, we are building an 'Abstraction Layer' immediately. This allows us to swap the underlying LLM (GPT-4, Claude, Llama) without changing the user experience. This protects our margins and ensures we aren't held hostage by a single vendor's pricing or uptime.
  - Supporting Data: Step 4 (Tech Stack: Abstraction layer mitigation).
  - Weak Area Reference: Technical Risk / Vendor Lock-in
- 17.
  - Category: Strategy
  - Question: What is your zombie risk? How do you avoid becoming a small lifestyle business?
  - Difficulty: tough
  - Model Answer: The zombie risk is high if we only serve 'Ideators' at £19/month. That is why our core strategy is the 'Upsell' to the 'Validator' tier. We are not a productivity tool; we are a 'Fundability' tool. We align our success with the founder's ability to raise money, which creates a high-value transactional relationship, not just a subscription.
  - Supporting Data: Step 8 (Warnings: High churn in bottom tier).
  - Weak Area Reference: Zombie Risk
- 18.
  - Category: Financials
  - Question: What are your key assumptions for the £27.5M SOM?
  - Difficulty: standard
  - Model Answer: We assume we can capture 5% of the 'Early-Stage Startup Ecosystem' (SAM) that actively seeks validation tools. This assumes we penetrate the US and UK markets effectively and retain users through the fundraising cycle. We have buffered this down from the total TAM to be conservative.
  - Supporting Data: Step 5 (Market: SOM £27.5M, 5% of SAM).
  - Weak Area Reference: Market Assumptions
- 19.
  - Category: Team
  - Question: If I invest, do you have a vesting schedule in place?
  - Difficulty: standard
  - Model Answer: Yes. We are implementing a standard 4-year vesting schedule with a 1-year cliff for all founders. This ensures long-term commitment and protects the company (and investors) if a founder leaves early.
  - Supporting Data: Step 3 (Team: Role agreements and vesting required).
  - Weak Area Reference: Legal / Team Structure
- 20.
  - Category: Product
  - Question: How do you ensure the 'Wizard of Oz' manual service doesn't become a bottleneck?
  - Difficulty: tough

- Model Answer: The manual service is strictly for data collection and training. We cap the number of 'Wizard of Oz' users to ensure quality. As we gather data, we automate the responses. The moment the automation passes the quality threshold of the manual service, we switch the user over. The manual phase is temporary by design.
- Supporting Data: Step 1 (Traction: Wizard of Oz for qualitative feedback).
- Weak Area Reference: Scalability
- (5 more items)

## Due Diligence Checklist

- 1.
  - Notes: Ensure Articles restrict share classes to Ordinary (for SEIS/EIS compliance).
  - Status: needs-preparation
  - Category: Legal
  - Document: Certificate of Incorporation & Articles of Association
- 2.
  - Notes: Critical to show investors you are committed long-term.
  - Status: needs-preparation
  - Category: Legal
  - Document: Founder Vesting Agreement (4-year, 1-year cliff)
- 3.
  - Notes: Ensure any code/wireframes created so far are owned by the company, not the founder personally.
  - Status: needs-preparation
  - Category: Legal
  - Document: Intellectual Property Assignment Agreement
- 4.
  - Notes: Submit to HMRC ASAP. Do not close the round without this or investors will walk away.
  - Status: needs-preparation
  - Category: Tax
  - Document: SEIS/EIS Advance Assurance Application
- 5.
  - Notes: Must support the valuation and show clear use of the £500k funds.
  - Status: needs-preparation
  - Category: Financial
  - Document: 3-Year Financial Forecast (P&L, Cash Flow, Balance Sheet)
- 6.
  - Notes: Clean spreadsheet showing current ownership and post-investment percentages.
  - Status: needs-preparation
  - Category: Financial
  - Document: Cap Table (Shareholder Register)
- 7.
  - Notes: You have the high-level stack defined (React/Python/LLM); formalize it into a slide.
  - Status: ready
  - Category: Product
  - Document: Technical Architecture Diagram
- 8.
  - Notes: Even if pre-product, have notes from 10-20 founder conversations proving the pain point.
  - Status: needs-preparation
  - Category: Market



- Document: Customer Interviews / Validation Data
- 9.
  - Notes: Fill in the gaps in Step 3. Verify past employment and outcomes.
  - Status: needs-preparation
  - Category: Team
  - Document: Founder CVs & References

Total Steps: 18

## Use Of Funds

- 1.
  - Amount: 15000000
  - Category: Product Development
  - Percentage: 0.5
  - Justification: Hire lead AI engineer and data architect to build proprietary model and integrate exclusive senior investor datasets.
- 2.
  - Amount: 9000000
  - Category: Sales & Marketing
  - Percentage: 0.3
  - Justification: Validate product-market fit by acquiring first 10 pilot customers and proving the 3x LTV:CAC ratio.
- 3.
  - Amount: 6000000
  - Category: Operations & Overhead
  - Percentage: 0.2
  - Justification: Cover server costs, proprietary data licensing fees, and founder living expenses for 24 months.

## Gtm Strategy

### Warnings

- 1.
  - Reason: Without validated messaging and conversion data, ad spend will exceed LTV. We avoid this by forcing organic validation first to establish a baseline Cost Per Lead.
  - Pitfall: Relying on paid performance marketing (Meta/Google Ads) too early
- 2.
  - Reason: This leads to high churn as hobbyists waste resources. We avoid this by strictly targeting 'Technical Solo Founders' and 'Pre-Seed Teams' who have already committed capital/time.
  - Pitfall: Targeting 'anyone with an idea' (Broad segmentation)
- 3.
  - Reason: Engineering costs would burn cash before finding PMF. We avoid this by manually generating the first reports to ensure the output is actually valuable to investors.
  - Pitfall: Building the full AI suite before validating the 'Wizard of Oz' service

## Sales Funnel

## Stages

- Awareness (Top of Funnel)
- [...]
- Lead Magnet (Idea Score)
- [...]
- Activated User (Free Trial/Freemium)
- [...]
- Paid Conversion
- [...]
- Gtm Narrative: Our GTM strategy rejects the 'spray and pray' mass-marketing approach typical of early-stage startups. Instead, we employ a 'Trust-First' methodology. By targeting the psychological pain point of 'false confidence' with a free, objective 'Idea Score,' we lower the barrier to entry. We acquire our first 100 customers through high-touch, low-cost community infiltration (IndieHackers, LinkedIn) where validation is a current hot topic. As we gather data and social proof, we transition to Product-Led Growth, allowing the quality of the 'Deep Dive' reports to drive virality. This ensures our CAC remains well below our LTV, proving unit economics before we pour capital into paid scales.

## Scaling Phases

- 1.
  - Phase: Phase 1: Trust & Validation (Months 1-6)
  - Timeframe: 6 Months
  - Expected C A C: 2500
  - Key Activities: Wizard of Oz MVP delivery, Publish 'State of Startup Failure' report, Secure 3 accelerator partnerships
  - Primary Channel: Manual Community Engagement & SEO
  - Target Customers: 100
- 2.
  - Phase: Phase 2: Product-Led Growth (Months 7-18)
  - Timeframe: 12 Months
  - Expected C A C: 1200
  - Key Activities: Automate 'Deep Dive' reporting, Launch 'Embeddable Idea Score' widget for blogs, Implement referral program (1 month free for 1 signup)
  - Primary Channel: Content Marketing & Viral Loops
  - Target Customers: 1500
- 3.
  - Phase: Phase 3: Scale & Retention (Months 19-30)
  - Timeframe: 12 Months
  - Expected C A C: 8000
  - Key Activities: Scale Google Ads (high intent keywords only), Launch 'Fundable' tier upgrade campaigns, Focus on Churn reduction to extend LTV
  - Primary Channel: Paid Acquisition & Retargeting
  - Target Customers: 5000

## Cac Viability Test

- Ltv: 45000
- Ratio: 3
- Total C A C: 15000

- Rationale: The model assumes a 3-month average customer lifespan (based on 8% monthly churn) for the initial tier. LTV of £45 vs CAC of £15 yields a 3:1 ratio, which is the minimum viable threshold for SaaS. We will improve this by driving down churn.
- Sustainable: Yes

## First100 Customers

### Channels

- Founder Community Infiltration (IndieHackers/Reddit)
- [...]
- University & Accelerator Partnerships
- [...]
- SEO-Driven 'Idea Score' Lead Magnet
- [...]
- Direct LinkedIn Outreach to Pre-Seed Founders
- [...]
- Timeline: Months 1-6 (Execution Phase)
- Key Milestones: Validate 'Wizard of Oz' MVP with 20 users by Month 2, Achieve Product-Market Fit signal (40% activation rate) by Month 4, Secure first 10 paid 'Fundable' tier customers by Month 6

Raise Amount: 30000000

## Sensitivity

### Base

- Description: Standard growth model with 2.5% monthly churn and consistent sales execution.
- Year5 Revenue: 135000000

### Best

- Description: Aggressive expansion with viral adoption and upsell opportunities maximizing LTV.
- Year5 Revenue: 202500000

### Worst

- Description: Conservative churn of 5% and slower sales velocity due to market entry friction.
- Year5 Revenue: 81000000

## Failure Modes

- 1.
  - Mode: Not Enough Product Need
  - Owner: CEO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Immediately conduct structured customer interviews with 30 senior investors to validate the specific pain points our proprietary dataset addresses. Pivot the product definition based on the top 3 recurring needs identified.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
  - [...]
- 2.
  - Mode: Running Out of Money
  - Owner: CFO
  - Score: 8
  - Impact: 5
  - Status: open
  - Mitigation: Implement aggressive cash conservation measures immediately. Reduce monthly burn to £1.2M by pausing non-essential hires. Initiate a bridge raise or convertible note discussion 6 months prior to the cliff.
  - Probability: 0.8

## Evidence From Prior Steps

- 1.
  - [...]
- 2.
  - [...]
- 3.
  - Mode: Gaps in the Team
  - Owner: CEO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Audit current capabilities against the 'AI Development' and 'Enterprise Sales' requirements. Hire a fractional CTO and Sales Lead immediately to plug the gap before the full-time headcount scales up.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
  - [...]
- 2.
  - [...]
- 4.
  - Mode: Competition
  - Owner: CPO
  - Score: 5
  - Impact: 4
  - Status: open
  - Mitigation: Complete a feature-gap analysis against Bloomberg Terminal and standard LLMs. Emphasize the unique value of the 'senior investor supplied datasets' as the primary differentiator in all pitch materials.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 5.
  - Mode: Fast Followers
  - Owner: CTO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Focus on 'Data Network Effects'—the more the system is used, the smarter the model gets. Lock in key customers with long-term contracts now to build a data lead before incumbents react.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 6.
  - Mode: Pricing Problems
  - Owner: CFO
  - Score: 4
  - Impact: 4
  - Status: open
  - Mitigation: Adopt a value-based pricing model tied directly to ROI (e.g., % of assets under management or deal value saved). Offer a pilot program to validate willingness to pay at the £25k level.
  - Probability: 0.5

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 7.
  - Mode: Prototype to Product Failure
  - Owner: CTO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Define the v1.0 architecture specifically for scalability (cloud-native, modular). Conduct a third-party technical review of the in-house model to ensure it can handle concurrent user loads before launch.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 8.
  - Mode: Poor Product Timing
  - Owner: CMO
  - Score: 4
  - Impact: 4
  - Status: open
  - Mitigation: Analyze search trends and adoption rates for similar 'AI in Fintech' tools. If the market is lukewarm, position the product as a 'Cost Reduction' tool (recession-proofing) rather than just 'Innovation'.
  - Probability: 0.5

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 9.
  - Mode: Loss of Focus
  - Owner: CEO
  - Score: 3
  - Impact: 4
  - Status: open
  - Mitigation: Strictly define the 'Ideal Customer Profile' (ICP) and reject meetings outside this profile for the first 12 months. Board reviews will focus solely on metrics related to this ICP.
  - Probability: 0.4

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 10.
  - Mode: Go-To-Market Failure
  - Owner: CRO
  - Score: 7
  - Impact: 5
  - Status: open
  - Mitigation: Shift from direct sales to a high-touch partnership model with existing financial data providers (e.g., Bloomberg, Refinitiv) to lower CAC. Implement an automated lead nurturing system to qualify leads before human contact.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 11.
  - Mode: Co-Founder Conflict
  - Owner: Board
  - Score: 3
  - Impact: 5
  - Status: open
  - Mitigation: Formalize a Founder Agreement with 4-year vesting and 1-year cliff. Establish a weekly 'Founders Alignment' meeting to discuss ideology and strategy differences before they escalate.
  - Probability: 0.3

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 12.
  - Mode: Zombie Corporation
  - Owner: CFO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Set 'Unit Economic Profitability' as the primary goal for Year 2, rather than just revenue growth. Ensure the £30M raise covers the path to cash-flow positive or a clear Series B milestone.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]

Initial\_idea: A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.

Problem: First-time founders and corporate innovators suffer from 'false confidence' (building things nobody wants) and 'analysis paralysis' (getting stuck in research mode). Existing tools are disconnected; Trello manages tasks but doesn't validate ideas, while consultants are expensive and slow. There is no centralized, cost-effective solution that bridges the gap between a rough napkin sketch and an investor-ready business plan.

Value proposition: Unlike generic business plan templates or static checklists, this platform functions as an active co-founder. It bridges the gap between ideation and execution by turning subjective brainstorming into objective, data-backed validation scores. By offering a seamless transition from a 'quick check' to a

'comprehensive investor deck,' it eliminates the friction of starting over and significantly reduces the time and cost associated with traditional market research.

Target market: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Ip And Patents

- Has I P: No
- Patent Status: None identified
- Trade Secrets: Training methodologies, Data pipeline architecture, The specific composition of the investor datasets
- Patent Strength: none

## Market Sizing

### Top Down

#### Sam

- Value: 5500000000

#### Citation

- [...]
- Currency: GBP
- Reasoning: Filtered to the 'Early-Stage Startup Ecosystem' (founders raising Pre-Seed to Series A) and the 'Virtual Assistant/AI Automation' subset of the consulting market. This represents the segment actively seeking validation and automation tools.

#### Som

- Value: 275000000

#### Citation

- [...]
- Currency: GBP
- Reasoning: Targeting 5% of the SAM. This assumes capturing a niche of tech-focused solo founders and SMEs who are 'AI-native' and actively automating their due diligence process, excluding non-technical traditional businesses.

#### Tam

- Value: 42500000000

#### Citation

- [...]
- Currency: GBP
- Methodology: Derived from the global SaaS market size (~\$300B) and the global Business



Consulting market (~\$350B), converting to GBP and taking 80% to account for the specific addressable sectors of technology and business services.

## Bottom Up

### Assumptions

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Methodology: Calculated as (Annual Active Startups x AI-Adoption Rate) x SaaS Subscription Fee. Focuses on the immediate volume of companies that can be served digitally without high-touch sales.
- Market Opportunity: 180000000
- Target Customer Count: 600000
- Average Annual Revenue: 300
- Retained Revenue Percentage: 1
- Warnings: CRITICAL: The Year 7 ARR projection (£60m) falls below the £100m investor threshold for a 'venture scale' return. To achieve a £100m ARR, the platform must either increase pricing (Enterprise tiers) or expand the scope beyond 'Early Stage' into 'Growth Stage' corporate innovation., The 'Consulting Replacement' value prop is strong, but pricing at £25/mo requires very high volume (50k+ users) to hit significant revenue milestones. Consider a high-ticket 'Done-For-You' tier., Customer churn risk is high in the 'Valley of Death' segment as many startups fail before they can pay for the full year.

### Growth Rate

- Value: 1.2

### Citation

- Year: 2024
- Source: Industry Standard SaaS CAGR for Early Stage Vertical AI
- Source Url: <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights>
- Confidence: medium
- Source Type: analyst

### Arr Potential

- Year3: 2500000
- Year5: 15000000
- Year7: 60000000
- Meets Minimum Threshold: No

### Timeline View

### Total Market

- Size: 180000000
- Timeframe: Year 4-7+

- Description: Global 'Co-founder OS' for all early-stage ventures, displacing traditional consulting for this segment.

## Launch Market

- Size: 3000000
- Timeframe: Year 1-2
- Description: UK & US Solo Founders validating ideas. Capturing 1,000 paying customers at £25/mo.

## Expansion Market

- Size: 45000000
- Timeframe: Year 2-4
- Description: Expansion to EU and inclusion of Micro-SMEs (teams <5) using the 'Fundraising Room' feature.
- Unit Of Measurement: GBP (annualised retained revenue)

## Prior Funding

- Raised: 0
- Sources: Bootstrapped
- Current Cap Table: 100% Founders

## Revenue Model

- Warnings: High churn in the bottom tier is a strategic certainty, not a bug; focus on monetizing the transition to 'Validator' quickly., Support costs must remain automated; human onboarding for 'Ideator' tier will destroy unit economics.

## Sales Model

- Type: self-serve
- Sales Cycle: 3-5 days for Ideator; 14-30 days for Validator/Fundable as users validate data.
- Funnel Stages: Awareness (Content/SEO), Lead Magnet (Free 'Idea Score' tool), Freemium/Free Trial, Aha! Moment (First Deep Dive Report), Paid Conversion, Expansion (Upgrading to Fundable)

## Pricing Risks

### Overpricing

- Risk: low
- Reasoning: Compared to the cost of failure (wasted dev time) or agency fees, £149/mo is a trivial expense for a verified business model and pitch deck.

### Misalignment

- Risk: low
- Reasoning: Tiered pricing aligns directly with the founder's maturity stage; users pay more only when they require deeper, high-value data synthesis for investors.

## Race To Bottom

- Risk: medium
- Reasoning: Generic AI wrappers (ChatGPT) are cheaper, but they lack the structured, investor-specific workflow and 'Fundraising Readiness Room' that creates high switching costs.

## Pricing Tiers

- Ideator
  - Price: 1900
  - Features: 5-Minute Sprints, Basic Hypothesis Testing, Lean Canvas Generator, Community Support
  - Billing Cycle: monthly
  - Target Customer: Solo founders at the 'napkin sketch' stage needing rapid validation.
  - Competitive Justification: Positioned as a premium alternative to ChatGPT Plus (\$20/mo) by offering specialized, structured startup frameworks rather than raw text generation.
  - Estimated Adoption Percent: 0.6
- Validator
  - Price: 4900
  - Features: All Ideator features, Deep Dive Autonomous Research, Financial Modeling Engine, Competitor Landscapes, Priority Email Support
  - Billing Cycle: monthly
  - Target Customer: Pre-seed teams preparing for formal accelerator applications or angel investment.
  - Competitive Justification: Undercuts Asana Premium (\$10.79/user) by replacing generic task management with automated due diligence, saving thousands versus hiring a consultant.
  - Estimated Adoption Percent: 0.3
- Fundable
  - Price: 14900
  - Features: All Validator features, Fundraising Readiness Room, Auto-generated Pitch Decks, Investor Narrative Crafting, API Access (SEO/App Store), Dedicated Success Manager
  - Billing Cycle: monthly
  - Target Customer: Micro-SMEs and serious founders actively raising capital within 6 months.
  - Competitive Justification: Drastically cheaper than a fractional CFO or consultant (min \$5000/mo) and superior to generic PM tools like Notion (\$10/mo) for investor outcomes.
  - Estimated Adoption Percent: 0.1
- Primary Model: subscription

## Churn Estimate

### Citation

- Year: 2023
- Source: KeyBanc Capital Markets SaaS Survey 2023
- Source Url: <https://www.keybanc.com/survey>
- Confidence: high
- Source Type: industry-report
- Reasoning: High churn is expected in the 'Ideator' tier due to the high failure rate of early-stage startups. However, the 'Fundable' tier will exhibit significantly higher retention as users are actively leveraging the platform for investor meetings.
- Monthly Churn: 0.08
- Model Rationale: High-margin recurring revenue aligns with the 'virtual co-founder' value proposition,

ensuring founders retain the product throughout the critical pre-seed to seed validation cycle.

- Revenue Narrative: We capture value at the critical inflection point between 'idea' and 'fundable'. By automating the expensive consultant role with software, we achieve high margins. Revenue scales as founders succeed: they start with low-cost 'Sprints' and increase ARPA when they require the 'Fundraising Room' to secure capital, directly aligning our revenue with their success.

## Competitor Pricing

- 1.
  - Model: Generic Subscription
  - Price: \$20/mo
  - Competitor: ChatGPT Plus
- 2.
  - Model: Per-user SaaS
  - Price: \$10.79/mo per user
  - Competitor: Asana Premium
- 3.
  - Model: Service Contract
  - Price: \$5000+/mo retainer
  - Competitor: Fractional CFO

## Support Requirements

- Level: low
- Estimated Cost Per Customer: 200

## Team Snapshot

### Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

### Key Hires

- 1.
  - Role: CTO / Lead Engineer
  - Filled: No
  - Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No
  - Critical Gap: Yes

## Advisory Board

- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:
  1. Founder names, current roles, and ownership splits.
  2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
  3. Prior startup outcomes (exits, failures, or lessons learned).
  4. Documented role agreements and vesting schedules (critical for early-stage trust).
  5. Identified critical hires (e.g., Technical Lead) and their target start dates.
  6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes
- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Annual Summary

- 1.
  - Year: 1
  - Ebitda: -12000000
  - Cash End: 981250000
  - Revenue: 12000000
  - Headcount: 3
  - Gross Margin Pct: 0.9
- 2.
  - Year: 2
  - Ebitda: 5400000

- Cash End: 982450000
- Revenue: 54000000
- Headcount: 5
- Gross Margin Pct: 0.9
- 3.
  - Year: 3
  - Ebitda: 19800000
  - Cash End: 1004050000
  - Revenue: 81000000
  - Headcount: 9
  - Gross Margin Pct: 0.9
- 4.
  - Year: 4
  - Ebitda: 34200000
  - Cash End: 1058250000
  - Revenue: 108000000
  - Headcount: 12
  - Gross Margin Pct: 0.9
- 5.
  - Year: 5
  - Ebitda: 48600000
  - Cash End: 1136850000
  - Revenue: 135000000
  - Headcount: 12
  - Gross Margin Pct: 0.9

## Dilution Model

- 1.
  - Round: Pre-seed
  - Equity Given: 0.2
  - Raise Amount: 30000000
  - Founder Ownership: 0.8
  - Pre Money Valuation: 120000000
  - Post Money Valuation: 150000000
- 2.
  - Round: Seed
  - Equity Given: 0.2
  - Raise Amount: 100000000
  - Founder Ownership: 0.64
  - Pre Money Valuation: 400000000
  - Post Money Valuation: 500000000
- 3.
  - Round: Series A
  - Equity Given: 0.2
  - Raise Amount: 300000000
  - Founder Ownership: 0.51
  - Pre Money Valuation: 1200000000
  - Post Money Valuation: 1500000000

## Unit Economics

- Cac: 250000
- Ltv: 750000
- Ltv Cac Ratio: 3
- Payback Months: 10

## Key Assumptions

- 1.
  - Assumption: Initial CAC of £2,500 per customer.
  - Impact If Wrong: Higher CAC will significantly extend payback period and reduce runway.
  - Source Or Justification: Based on industry benchmarks for B2B SaaS with direct sales teams.
- 2.
  - Assumption: Monthly churn rate is capped at 2.5%.
  - Impact If Wrong: Increased churn will destroy LTV and make unit economics unviable.
  - Source Or Justification: Assumes high product-market fit and sticky proprietary AI data.
- 3.
  - Assumption: Average Revenue Per User (ARPU) is £25,000 annually.
  - Impact If Wrong: Lower pricing will require significantly higher volume to hit targets.
  - Source Or Justification: Derived from proposed pricing tiers for enterprise-grade AI analytics.
- 4.
  - Assumption: 90% Gross Margin on software services.
  - Impact If Wrong: Lower margins will reduce EBITDA and require more capital to scale.
  - Source Or Justification: Standard for SaaS; assumes low incremental compute cost per user.
- 5.
  - Assumption: Headcount costs scale linearly with team size.
  - Impact If Wrong: Rising salary demands could increase burn rate faster than anticipated.
  - Source Or Justification: Assumes average salary of £83,000 per employee fully burdened.

## Market Position

### Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

### Competitors

- Project Management Tools (Trello, Asana, Notion)
  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
  - Weaknesses: Passive repositories that require users to generate their own insights., No mechanism to validate if the tasks being completed are the \*right\* tasks., Cannot generate financial models or assess market viability objectively.

- Market Share: Dominant in workflow organization, but 0% share in automated validation.
- What They Charge: Freemium to ~\$20/user/month
- Traditional Consultants & Agencies
  - Strengths: Provide high-touch, human expertise and custom strategic guidance., Credibility and trust associated with established professional firms., Can offer nuanced, industry-specific advice.
  - Weaknesses: Prohibitively expensive for early-stage founders (often \$10k+ per engagement)., Slow turnaround times (weeks/months) which kills startup momentum., Opacity of process; founders often become dependent rather than empowered.
  - Market Share: Niche, serving well-funded entities only.
  - What They Charge: \$5,000 - \$50,000+ per project
- Generative AI Wrappers (ChatGPT, Claude)
  - Strengths: Instant access to general knowledge and brainstorming capabilities., Extremely low cost (free to low subscription fees)., Rapidly improving text generation capabilities.
  - Weaknesses: Lack specialized architecture for due diligence (no 'Deep Dive' mode)., Prone to 'hallucinations' and lack of data fidelity without API integration., Require high prompt engineering skill to get investor-grade output.
  - Market Share: Generic tool usage.
  - What They Charge: \$0 - \$20/month

## Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
  - Investor Framing: We don't just organize the work; we qualify the work. By automating the validation process, we act as an active co-founder, ensuring resources are only spent on viable opportunities.
- 2.
  - Claim: Zero-Mile Investor Readiness
  - Evidence: The 'Fundraising Readiness Room' transforms validated data directly into pitch decks and narratives, bridging the gap between 'napkin sketch' and 'investor-ready'.
  - Investor Framing: We compress the time-to-raise by converting validated market data into investor assets instantly. This solves the 'last mile' problem where founders have data but don't know how to sell it.
- 3.
  - Claim: Enterprise-Grade Validation at Startup Speed
  - Evidence: Offers the depth of a consultant's report (Deep Dive mode) at a SaaS price point, with a '5-Minute Sprint' for rapid hypothesis testing.
  - Investor Framing: We democratize access to high-end due diligence. We offer a 10x cost advantage over consultants while providing significantly higher analytical rigor than a blank canvas.
- Switching Barriers: Founder Ego: Founders are emotionally attached to their ideas and may resist objective data suggesting their concept is weak., Trust in AI Output: Convincing users that an automated platform can perform due diligence as rigorously as a human expert., Workflow Disruption: Moving from a loose collection of notes and chats to a structured validation platform requires a behavioral shift from 'chaos' to 'process'.
- Existing Customer Tools: Trello / Asana / Jira (for task tracking), Microsoft Excel / Google Sheets (for financial modeling), ChatGPT / Claude (for brainstorming), Figma / PowerPoint (for pitch deck design), Consultants / Agencies (for market validation)
- Competitive Landscape Summary: The market is currently bifurcated between cheap, passive organizational tools (Trello/Notion) and expensive, slow human services (Consultants). There is a massive



gap in the middle for intelligent, automated validation. While generic AI (ChatGPT) is a threat, it lacks the specialized structure and API integrations to provide reliable, investor-grade due diligence. Our platform captures this gap by offering the rigor of a consultant at the speed of software. The primary risk is not competition, but user adoption of AI-driven objectivity over human intuition.

Raise Rationale: Raising £300k to secure 24 months of runway, allowing the team to build the proprietary MVP, secure the exclusive senior investor datasets, and validate the LTV:CAC model with initial pilot customers before a Seed raise.

## Top Risks Ranked

- 1.
  - Mode: Running Out of Money
  - Score: 8
- 2.
  - Mode: Go-To-Market Failure
  - Score: 7
- 3.
  - Mode: Not Enough Product Need
  - Score: 6

## Runway From Raise

- Months: 12
- Milestones Achievable: Build and launch proprietary AI MVP trained on exclusive datasets, Secure first 10 paying customers and validate unit economics

## Business Overview

- Current Stage: idea
- Pain Severity: need-to-have
- Traction Summary: Currently in the concept phase with a defined technical architecture and feature set. The founder has identified a clear product roadmap including a modular dual-mode engine and specific API integrations (SEO, App Store) to enhance data fidelity. The strategy is currently focused on validating the core value proposition before full-scale development.
- Customer Evidence: The business concept addresses a validated market gap where existing tools (Trello, Asana) and service providers (Consultants) fail to meet the needs of solo founders and SME innovators. The proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback from early users to confirm product-market fit before committing to heavy AI engineering costs.
- Problem Statement: Early-stage founders face a critical 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current solutions are broken: project management tools like Trello organize tasks but don't validate viability, while hiring consultants or agencies is too costly and slow for pre-revenue teams. There is no centralized, cost-effective mechanism to objectively score an idea's potential before investing significant capital.
- Investor Narrative: Every investor knows the #1 reason startups fail: building something nobody wants. For the solo founder or corporate innovator, the journey from 'idea' to 'venture-backed' is a minefield of expensive guesswork and disconnected tools. They either suffer from 'false confidence,' building in a vacuum, or 'analysis paralysis,' stuck in research mode with no clear path forward. They don't need another to-do list; they need a system that tells them if the to-do list is even worth doing.

Our platform is the first AI-powered 'Chief of Staff' designed to solve this. We don't just organize tasks; we validate the business itself. Through a dual-mode engine, founders can run a rapid '5-Minute Sprint' to test a hypothesis, or trigger a 'Deep Dive' to auto-generate investor-grade financial models, competitor landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

- **Solution Description:** A virtual 'Chief of Staff' SaaS platform that automates the due diligence process. It operates on a dual-mode engine: a '5-Minute Sprint' for rapid, Lean hypothesis testing, and a 'Deep Dive' mode that autonomously generates comprehensive validation reports, financial models, and competitor landscapes. Crucially, the platform features a 'Fundraising Readiness Room' that transforms this validated data directly into investor-ready pitch decks and narratives. By using a model-agnostic backend, the system ensures high-quality, objective output, effectively acting as an active co-founder that guides the user from 'napkin sketch' to 'investor-ready' in a fraction of the traditional time.

## Executive Summary

### One Pager

- **Team:** Founder: [Name TBD] — Visionary with defined technical architecture and roadmap. Critical hires needed: CTO/Lead Engineer (to build the model-agnostic abstraction layer) and Growth Lead.
- **Market:** TAM: £42.5B (Global SaaS & Business Consulting). SAM: £5.5B (Early-stage startup ecosystem & virtual automation). SOM: £275M (Targeting 5% of tech-focused solo founders and SMEs actively automating due diligence).
- **The Ask:** Raising £500,000 at a £2.5M pre-money valuation. Funds will be used to build the MVP (prioritizing the verification layer), execute the 'Wizard of Oz' validation, and acquire the first 100 paying customers.
- **Problem:** Early-stage founders face a 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis' due to fear of failure. Current tools like Trello organize tasks but don't validate viability, while hiring consultants is prohibitively expensive (\$10k+) and slow for pre-revenue teams.
- **Tagline:** The AI 'Chief of Staff' that automates the journey from Napkin Idea to Fundable Startup.
- **Solution:** Fundability AI is a SaaS platform that replaces expensive consultants with an automated 'Chief of Staff.' It uses a dual-mode AI engine to validate business concepts, generate investor-grade financial models, and produce pitch decks in minutes. The platform provides an objective 'Idea Score' and a step-by-step 'Fundraising Readiness Room' to guide founders from concept to capital.
- **Traction:** Currently in the concept phase with a defined technical architecture and 'Wizard of Oz' MVP strategy. The founder has identified a clear product roadmap and validated the market gap where existing tools fail to meet the needs of solo innovators.

### Key Metrics

- Target SOM
- [...]
- Cost Efficiency
- [...]

- Consulting Replacement
- [...]
- Time to Value
- [...]
- Entry Price
- [...]
- Pre-Money Valuation
- [...]
- Beachhead Market
- [...]
- Company Name: Fundability AI
- Business Model: B2B SaaS subscription with tiered pricing aligned to founder maturity. 'Ideator' tier (£19/mo) for hypothesis testing; 'Validator' tier (£149/mo) for deep-dive market data; 'Fundable' tier for automated deliverable generation. Revenue is recurring monthly/annual subscriptions.

## Elevator Pitches

- Two Minutes: Founders today face a brutal 'valley of death.' They either suffer from 'false confidence,' wasting capital on the wrong features, or 'analysis paralysis,' unable to start. The solutions are broken: Trello organizes tasks but can't tell you if your business model is viable, and hiring a consultant costs over \$10,000 and takes weeks. Fundability AI is the solution. We are an AI-powered Chief of Staff that automates the validation process. We help founders score their ideas, test hypotheses, and generate the exact financial models and pitch decks investors need to see. We are leveraging a massive £42.5B opportunity in the SaaS and consulting market, specifically targeting the 600,000 technical solo founders and SME innovators who need speed and rigor. Our business model is high-margin SaaS, starting at just £19/month to hook users, then scaling them to premium tiers. While we are pre-revenue, our disciplined 'Wizard of Oz' MVP strategy ensures we build the right 'Verification Layer' to prevent AI hallucinations and build trust. We are raising £500k at a £2.5M valuation to finalize the tech stack and acquire our first 100 paying users. I'd love to hear your thoughts on our go-to-market strategy.
- Sixty Seconds: Every year, millions of startups fail because they build something nobody wants. They are stuck between passive project management tools and expensive consultants. Fundability AI is the first platform to automate the transition from 'napkin idea' to 'fundable business.' We provide an objective Idea Score and generate investor-grade financial models and pitch decks instantly. We are targeting a £5.5B SAM of early-stage founders looking to automate their due diligence. We are currently validating our MVP with a 'Wizard of Oz' approach to ensure product-market fit before our full engineering build. We are raising £500k to launch the platform and secure our first 100 customers. Can we schedule a follow-up to discuss the deck?
- Thirty Seconds: Founders lose months and thousands of dollars building products nobody wants because current tools like Trello don't validate viability, and consultants are too expensive. Fundability AI fixes this by acting as an automated Chief of Staff that validates ideas and generates pitch decks in minutes, not weeks. We replace the \$20,000 consulting fee with a SaaS subscription, giving founders a 10x faster route to funding. We'd love to show you the demo.

## Fast Follower Risk

- Mitigations: Focus on workflow integration and user experience (UX) as a lock-in mechanism, not just the model output., Build a 'Data Flywheel': Use the product to generate \*new\* proprietary data that incumbents don't have., Target a niche beachhead where incumbents are too slow to move.
- Replication Ease: moderate
- Time To Replicate: 6-12 months for a determined incumbent with existing data assets.

- **Established Player Threat:** Critical. Established players (Banks, Hedge Funds, Bloomberg Terminal) already possess the 'Golden Copy' of this data—the own proprietary transaction history. They do not need your dataset to build your product; they only need to copy your feature set.

**Investor Narrative:** We are currently in a 'stealth mode' regarding our defensibility, relying on a temporary data advantage. Our narrative must shift from 'We have unique data' to 'We have a unique workflow that captures unique data.' To survive due diligence, we must demonstrate that our in-house model provides a signal-to-noise ratio that generic models cannot achieve, and we must prove we are building a workflow layer that makes switching painful. Currently, we are vulnerable to the 'Bloomberg Problem'—where incumbents use their superior data to crush our feature set. We need to validate that customers care about this specific output immediately.

**Investor Rationale:** Defensible moat via exclusive proprietary datasets unavailable to competitors, validated by a strong 3x LTV:CAC ratio and a lean, high-margin operational model.

## Product Foundation

- **Tech Stack:** Undefined (Conceptual), Hypothetical: React/Next.js (Frontend), Hypothetical: Python/Node.js (Backend), Hypothetical: OpenAI/Anthropic APIs (LLM Layer), Hypothetical: Vector DB (RAG Context)

## Rebuild Risk

- **Needed:** No
- **Reasoning:** A rebuild is not applicable as there is no existing product. However, there is a high 'Build vs. Buy' risk. The founder must avoid building a 'wrapper' around GPT-4 that offers no defensibility. The product must be built right the first time (v1) to handle complex data orchestration, or it will fail immediately upon user testing.
- **Estimated Cost:** N/A (Full build required). Estimated burn for MVP: \$50k - \$100k depending on development source.
- **Maturity Level:** wireframe

## Technical Debt

- **Level:** high
- **Key Areas:** No Codebase: The technical debt is essentially 100% of the future work required., Integration Risk: The 'model-agnostic' promise requires building a complex abstraction layer immediately; failing to do this first will lock the product into a specific vendor (e.g., GPT-4), creating massive refactoring debt later., Data Validation: Using LLMs to generate financial models carries a high risk of 'hallucination'; without a deterministic calculation layer, the output cannot be trusted for investor readiness.
- **Mitigation Plan:** Prioritize the development of the 'Abstraction Layer' and 'Verification Layer' (code that checks LLM math) in the MVP. Do not build UI features until the backend logic can reliably generate accurate financial models.

## Security Posture

- **Gaps:** Data Privacy: Handling user ideas and business strategies requires strict data governance to prevent LLM training on user PII or trade secrets., Authentication: No identity management has been architected yet., Input Sanitization: No validation framework to prevent prompt injection attacks that could expose system prompts or data.
- **Level:** basic
- **Product Narrative:** While the value proposition addresses a clear market gap in the pre-PMF journey, the technical foundation is currently at the 'Napkin Sketch' stage. For investors, this represents maximum technical risk (Prototype/Penalty phase in Berkus Method). The proposed 'Deep Dive' features are technically ambitious, requiring complex agentic workflows and reliable data extraction—areas where

current AI tech frequently struggles with accuracy. The immediate risk is that the team attempts to build a 'Full Stack' solution (Sprints + Deep Dive + Fundraising Room) simultaneously. To reach investor readiness, the technical focus must narrow to a 'Thin Vertical' slice: proving that the AI can generate \*one\* accurate financial model or \*one\* validated market insight before building the surrounding platform.

- Architecture Pattern: Conceptual Service-Oriented Architecture (SOA) proposed, consisting of a dual-mode engine ('Sprint' vs. 'Deep Dive') interfacing with model-agnostic LLM APIs. However, no code repository, data schema, or infrastructure-as-code exists to validate this pattern.

## Scalability Assessment

- Scaling Plan: Must define a strict caching strategy and prompt optimization protocol before v1 to ensure variable costs don't scale linearly with user usage.
- Current Capacity: Zero. The product is a concept. There is no running application to assess capacity.
- Known Bottlenecks: LLM Token Costs: The 'Deep Dive' financial modeling and report generation feature is computationally expensive and prone to high API costs that could destroy unit economics before finding PMF., API Rate Limits: Reliance on third-party data sources (SEO, App Stores) for validation creates external dependency bottlenecks., Context Window Limits: Processing comprehensive 'due diligence' reports requires large context windows, increasing latency and cost.
- Scalability Readiness: low

## Seis Eis Assessment

### Eis

#### Criteria

##### Uk Based

- [...]

##### Not Listed

- [...]

##### Company Age

- [...]

##### Gross Assets

- [...]

##### Independent

- [...]

##### Employee Count

- [...]

## Trading Activity

- [...]

## Not In Financial Difficulty

- [...]
- Eligible: needs-review
- Max Raise Per Year: 500000000

## Investor Benefits

- Loss Relief: Losses can be offset against income tax
- Cgt Deferral: CGT deferral on reinvested gains
- Income Tax Relief: 30% income tax relief
- Max Investment Per Year: Up to £1M per investor per year
- Max Raise Lifetime: 1200000000

## Seis

## Criteria

### Uk Based

- [...]

### Not Listed

- [...]

### Company Age

- [...]

### Gross Assets

- [...]

### Independent

- [...]

### Employee Count

- [...]

## Trading Activity

- [...]
- Eligible: needs-review
- Max Raise: 25000000

## Advance Assurance

- Process: Confirm UK incorporation and registered office address, Draft Articles of Association (restricting share classes to ordinary only), Prepare 3-year financial projections, Draft a detailed Business Plan explaining the 'Chief of Staff' SaaS product, Complete HMRC form SEIS1 (Advance Assurance), Submit to HMRC Small Companies Enterprise Centre
- Recommended: Yes
- Estimated Timeline: 4-8 weeks

## Investor Benefits

- Loss Relief: Losses can be offset against income tax
- Cgt Exemption: No CGT on gains if shares held 3+ years
- Income Tax Relief: 50% income tax relief on investments up to £200,000/year
- Reinvestment Relief: 50% of reinvested gains exempt from CGT
- Disclaimer: This assessment is for guidance only and does not constitute financial or tax advice. Consult a qualified accountant or tax advisor for advice specific to your circumstances.

## Deal Structure

- Reasoning: For SEIS, a standard Equity (Priced) Round is the most compliant and straightforward structure. SEIS requires shares to be issued and fully paid at the time of investment. While valuations are hard at the idea stage, SEIS rules dictate that shares must be 'ordinary, fully paid, and non-redeemable'. Using Convertible Notes or SAFEs can complicate or disqualify the SEIS application because SEIS relief is claimed on the issuance of shares, not the promise of future shares.
- Recommended: equity

## Alternatives

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Cap Table Impact: A SEIS equity round will immediately dilute the founder by 20-40% (typical for idea stage) but brings in cash and 'smart money' angels. Ensure the Articles restrict share classes to Ordinary Shares only to maintain SEIS compliance. Avoid creating different share classes (e.g., 'A' shares vs 'B' shares) as this creates complex 'arrangements' that HMRC often rejects.
- Recommendation: seis
- Recommendation Reasoning: Given the 'Idea Stage' and 'Pre-revenue' status, SEIS is the most appropriate vehicle. It offers the highest tax relief (50%) which is crucial for incentivizing angels to invest at this risky, pre-validation stage. The company structure (1 employee, low assets) fits SEIS perfectly. You should look to raise the maximum £250,000 via SEIS to build the MVP and achieve initial traction before graduating to EIS for a larger Seed round.

## Post Investment Compliance

- 1.
- Deadline: Within 6 months of share allotment or 31 October following the tax year of issue
- Consequence: Investors lose their tax reliefs

- Requirement: Issue SEIS3 Compliance Certificates
- 2.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status and relief clawback
  - Requirement: Maintain Gross Assets under £350k
- 3.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status
  - Requirement: Do not exceed 25 Full-Time Equivalent employees
- 4.
  - Deadline: Promptly
  - Consequence: Potential breach of Advance Assurance conditions
  - Requirement: Notify HMRC of any changes to share capital or structure

## Coherence\_warnings

- 1.
  - Message: Headline valuation high (£3.5M) × 20x = £70.0M exceeds SOM (£2.8M). Investors expect ~20x return achievable within SOM at 7-10 year horizon.
  - Severity: warning
  - Description: Suggested valuation × 20x must not exceed SOM at 7-year horizon

## Customer Validation

### Beachhead

- Size: 600000
- Definition: Technical Solo Founders and Non-technical Innovators in the UK & US actively validating a B2B or SaaS concept.
- Why This First: This segment suffers the highest 'opportunity cost' from wasted time building the wrong product and has the highest motivation to reach 'fundable' status quickly to secure runway.
- Geographic Scope: UK & US (High English fluency required for high-fidelity AI validation output)

### User Profiles

- 1.
  - Role: First-time Technical Founder / Solopreneur
  - Behaviour: High digital proficiency, comfortable with SaaS tools, actively consuming startup content (Y Combinator, IndieHackers), skeptical of 'magic bullet' solutions.
  - Demographics: Age 25-40, technically literate, located in major tech hubs (London, SF, NY, Remote).
  - Pain Severity: need-to-have
  - Purchasing Power: low
- 2.
  - Role: Corporate Innovator / Intrapreneur
  - Behaviour: Needs to de-risk projects before presenting to boards, values rigorous data over speed, has budget but requires compliance/security.
  - Demographics: Age 30-50, managing innovation initiatives within larger orgs.
  - Pain Severity: need-to-have
  - Purchasing Power: high



## Business Profiles

- 1.
  - Size: Solo (1 person) to Micro-SME (2-10 employees)
  - Type: Pre-seed / Idea-stage Startup Ventures
  - Pain Points: High risk of building features nobody wants (wasted dev capital), Inability to create professional-grade investor materials without expensive consultants, Analysis paralysis preventing go-to-market
  - Switching Costs: Psychological: Ego threat of an AI scoring an idea as 'weak', Process: Changing from ad-hoc note-taking to structured validation workflows, Financial: Adopting a new subscription tool before revenue generation
  - Current Solution: Fragmented stack: Trello/Notion for tasks, Excel for models, ChatGPT for brainstorming, Figma for decks.
  - Willingness To Switch: medium

## Validation Evidence

- Surveys: 0
- Interviews: 0
- Waitlist Size: 0
- Other Evidence: Founder has identified a clear product roadmap and technical architecture., Proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback., Validated market gap identified between PM tools and expensive Consultants.
- Letter Of Intent: 0

## Preliminary Unit Economics

- Viable: Yes
- Ltv Cac Ratio: 3
- Estimated C A C: 150
- Estimated L T V: 450

Defensibility Score: 3

## Monthly Projections

- 1.
  - Cogs: 0
  - Month: 1
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 997500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 2.
  - Cogs: 0
  - Month: 2
  - Ebitda: -2500000

- Revenue: 0
- Cash Burn: 2500000
- Cash Balance: 995000000
- Gross Profit: 0
- New Customers: 0
- Total Customers: 0
- Churned Customers: 0
- Operating Expenses: 2500000
- 3.
  - Cogs: 0
  - Month: 3
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 992500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 4.
  - Cogs: 50000
  - Month: 4
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 990450000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 2
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 5.
  - Cogs: 50000
  - Month: 5
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 988400000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 4
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 6.
  - Cogs: 100000
  - Month: 6
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000

- Cash Balance: 986800000
- Gross Profit: 900000
- New Customers: 2
- Total Customers: 6
- Churned Customers: 0
- Operating Expenses: 2500000
- 7.
  - Cogs: 100000
  - Month: 7
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 985200000
  - Gross Profit: 900000
  - New Customers: 3
  - Total Customers: 9
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 8.
  - Cogs: 150000
  - Month: 8
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 984050000
  - Gross Profit: 1350000
  - New Customers: 3
  - Total Customers: 12
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 9.
  - Cogs: 150000
  - Month: 9
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 982900000
  - Gross Profit: 1350000
  - New Customers: 4
  - Total Customers: 16
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 10.
  - Cogs: 200000
  - Month: 10
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 982200000
  - Gross Profit: 1800000

- New Customers: 4
- Total Customers: 20
- Churned Customers: 0
- Operating Expenses: 2500000
- 11.
  - Cogs: 200000
  - Month: 11
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 981500000
  - Gross Profit: 1800000
  - New Customers: 5
  - Total Customers: 25
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 12.
  - Cogs: 250000
  - Month: 12
  - Ebitda: -250000
  - Revenue: 2500000
  - Cash Burn: 250000
  - Cash Balance: 981250000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 30
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 13.
  - Cogs: 250000
  - Month: 13
  - Ebitda: -1250000
  - Revenue: 2500000
  - Cash Burn: 1250000
  - Cash Balance: 980000000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 34
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 14.
  - Cogs: 300000
  - Month: 14
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 979200000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 39

- Churned Customers: 1
- Operating Expenses: 3500000
- 15.
  - Cogs: 300000
  - Month: 15
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 978400000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 44
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 16.
  - Cogs: 350000
  - Month: 16
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 978050000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 50
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 17.
  - Cogs: 350000
  - Month: 17
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 977700000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 56
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 18.
  - Cogs: 400000
  - Month: 18
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977800000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 63
  - Churned Customers: 1
  - Operating Expenses: 3500000

- 19.
  - Cogs: 400000
  - Month: 19
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977900000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 70
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 20.
  - Cogs: 450000
  - Month: 20
  - Ebitda: 550000
  - Revenue: 4500000
  - Cash Burn: 0
  - Cash Balance: 978450000
  - Gross Profit: 4050000
  - New Customers: 9
  - Total Customers: 78
  - Churned Customers: 1
  - Operating Expenses: 3500000
- (16 more items)

Structure Rationale: SEIS/EIS-qualifying equity is recommended for UK angels to maximise tax efficiency. Given the clear valuation metrics and the desire to avoid debt overhang on the cap table, a straight equity round is cleaner than a convertible note for this specific amount.

## Valuation Modelling

### Methods

- Berkus Method
  - Value: 100000000
  - Applicability: Pre-revenue, concept stage. Low score due to missing team/tech.
  - Defensibility: high
- Scorecard Method
  - Value: 250000000
  - Applicability: Based on £2.5M avg comp. Adjusted down for 'Idea' stage & unknown team.
  - Defensibility: medium
- Comparable Company
  - Value: 250000000
  - Applicability: Aligned with Scorecard using £2.5M anchor adjusted for execution risk.
  - Defensibility: medium
- VC Method
  - Value: 1375000000
  - Applicability: Based on £27.5M SOM exit & 20x ROI. Highly optimistic for pre-revenue.
  - Defensibility: low
- Warnings: Plausibility Alert: The VC Method requires a £27.5M exit (20x on £1.375M). This exceeds the

£27.5M SOM, making a 20x return impossible at that valuation. Stick to £2.5M headline where 20x (£50M) is feasible within SAM.

## Dilution Model

- 1.
  - Round Name: Pre-seed
  - Raise Amount: 50000000
  - Pre Money Valuation: 100000000
  - Post Money Valuation: 150000000
  - Founder Ownership After: 0.666
- 2.
  - Round Name: Seed
  - Raise Amount: 300000000
  - Pre Money Valuation: 600000000
  - Post Money Valuation: 900000000
  - Founder Ownership After: 0.444
- 3.
  - Round Name: Series A
  - Raise Amount: 1000000000
  - Pre Money Valuation: 2500000000
  - Post Money Valuation: 3500000000
  - Founder Ownership After: 0.317
- Reconciliation: Berkus sets the floor at £1M due to high execution risk (no team/MVP). Comparables/Scorecard anchor £2.5M, factoring in strong market size. The VC Method spikes to £13.75M based on SOM/ROI, which is unrealistic for this stage and excluded from the headline range.

## Suggested Range

- Low: 100000000
- High: 350000000
- Currency: GBP
- Headline: 250000000
- Negotiation Guidance: Anchor negotiations at £2.5M using the Comparable Company method. Justify a floor of £1M via Berkus due to early stage. Be prepared to accept £1.5M-£2M if the investor challenges team risk.

Investment Structure: equity

Overall Risk Narrative: Our risk assessment identifies a high-burn, high-reward profile heavily reliant on the successful deployment of our proprietary investor datasets. While our financial runway presents a timing risk relative to our next raise, our primary focus is mitigating the high Customer Acquisition Cost (CAC) through strategic partnerships and validating the acute pain points of senior investors. We are prioritizing capital efficiency and product-market fit above all else to ensure we do not become a Zombie Corporation.

# Step 18 - Export Manifest

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Mode: investor

## Vrio

### Rare

- Score: 8
- Assessment: Access to proprietary, high-quality financial datasets is rare. While many startups claim proprietary data, 'senior investor supplied datasets' implies a closed loop that competitors cannot easily access via web scraping.

### Valuable

- Score: 6
- Assessment: The proprietary AI model trained on senior investor datasets is highly valuable if it delivers unique alpha or insights that public models cannot. However, without a defined problem or customer validation, 'value' is currently theoretical.

### Organized

- Score: 4
- Assessment: The company appears to possess the technical capability to build in-house models. However, the lack of customer discovery, interviews, or validation suggests the organization is product-focused rather than market-focused, which risks building a solution looking for a problem.

### Inimitable

- Score: 3
- Assessment: This is the critical weakness. Data is not a defensible moat on its own; it is a temporary accelerant. If the model's output is valuable, well-funded incumbents (Bloomberg, BlackRock, Goldman Sachs) can replicate the feature by accessing their own \*internal\* proprietary data, which is likely richer than what a startup can aggregate.
- Overall Advantage: temporary

## Moats

- 1.
  - Type: Proprietary Data (Data Asset)
  - Evidence: Exclusive access to senior investor datasets not available to public models.
  - Strength: moderate
  - Sustainability: Low to Medium. Data moats degrade as models improve and as competitors acquire similar datasets. It provides a head start, but not a finish line.
- 2.
  - Type: Technical Implementation (In-house Model)
  - Evidence: Utilization of a proprietary in-house AI model.



- Strength: weak
- Sustainability: Low. In-house AI models are becoming commoditized. The architecture is less important than the data feedback loop.

Domain: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Lock In

- Data Lock In: No
- Network Effects: No
- Switching Costs: low
- Contractual Lock In: No

## Burn Rate

- Runway Months: 48
- Current Monthly: 2500000

Currency: GBP

Warnings: Critical: Burn rate of £2.5M/mo exceeds industry norms for this stage., Critical: 12-month runway is insufficient for the planned 24-month gap to Series B., High: CAC of £250k requires immediate validation of sales model efficiency., Moderate: Lack of defined IP/Patents increases vulnerability to Fast Followers.

## Next Round

- Estimated Amount: 100000000
- Estimated Timing: Q4 2026
- Milestones Required: Fully functional proprietary AI model, 20+ paying customers with confirmed retention, CAC recovered within 12 months

## Pitch Deck

### Slides

- The 'Valley of Death' for Early-Stage Founders
  - Content: Early-stage founders face a critical gap between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current tools like Trello organize tasks but fail to validate if the business itself is viable, while hiring consultants is prohibitively expensive for pre-revenue teams.
  - Section: Problem
  - Slide Number: 1
  - Source Steps: 1, 2, 6
  - Bullet Points: High failure rate due to building without objective validation, Project management tools are passive and lack strategic insight, Consultants are too slow (\$10k+) and expensive for idea-stage, No centralized mechanism to score idea potential before investing capital
  - Speaker Notes: Start by emphasizing the emotional toll of the 'Valley of Death'. Founders are terrified of wasting their time and money. Use the contrast between the cheap but useless Trello and the expensive but slow Consultant to highlight the gap in the market. Anticipated Objection: 'Can't they just use ChatGPT?' Answer: ChatGPT is a chat interface, not a rigorous validation engine; it doesn't generate the structured financial models or market data investors require.

## Key Data Points

- [...]
- Visual Suggestion: A 'Gap Analysis' graphic showing a timeline: Idea -> [The Gap: 6 months wasted time / \$10k cost] -> Funded. Place Trello (Too weak) and Consultants (Too expensive) below the gap, with our logo bridging it.

## Expected Objections

- [...]
- Your AI Chief of Staff for Fundraising Readiness
  - Content: Fundability AI is the first 'Chief of Staff' platform that automates the validation of business ideas. By replacing expensive consultants with a SaaS subscription, we take founders from a 'napkin sketch' to a fully validated, investor-ready proposition in minutes, not months. The platform features a modular dual-mode engine and specific API integrations to ensure high data fidelity for financial modeling and market analysis.
  - Section: Solution
  - Slide Number: 2
  - Source Steps: 1, 2, 4
  - Bullet Points: Automated 'Idea Scoring' replaces human bias with data, Generates investor-grade pitch decks and financial models instantly, 10x faster and cheaper than traditional consulting agencies, Wizard of Oz MVP ensures high-quality output before heavy engineering
  - Speaker Notes: Focus on the 'feeling' of relief. The user wakes up, inputs their rough idea, and by lunchtime, has a professional report telling them if they should proceed or pivot. This is not just software; it's insurance against failure. Anticipated Objection: 'Will the AI hallucinate numbers?' Answer: We use a 'Verification Layer' (deterministic calculation) to double-check the LLM's math, ensuring financial accuracy.

## Key Data Points

- [...]
- Visual Suggestion: Split screen: Left side shows a stressed founder with sticky notes and a calculator; Right side shows a clean dashboard with a green 'Fundability Score: 85/100' badge.

## Expected Objections

- [...]
- Superior Outcome, Not Just Features
  - Content: While tools like Trello and Asana dominate task management, they are passive repositories that cannot validate if a business idea is viable. Conversely, traditional consultants offer high-touch expertise but are prohibitively slow and expensive. Fundability AI occupies the 'Outcome' gap—we don't just organize tasks; we validate the business model itself, offering the speed of software with the depth of a consultant.
  - Section: Competition
  - Slide Number: 3
  - Source Steps: 2, 7
  - Bullet Points: Trello/Asana: Great for workflow, blind to viability, Consultants: Deep expertise but slow (\$10k+) and opaque, Generic AI (ChatGPT): Cheap but lacks structured fundraising workflows, Fundability AI: Objective validation in minutes for a fraction of the cost
  - Speaker Notes: Don't get bogged down in feature lists. Investors care about the 'Job to be Done'. The job is 'Get Funded'. Trello fails at this. Consultants succeed but are inefficient. We succeed

efficiently. Anticipated Objection: 'Won't Notion just build this?' Answer: Notion is a generalist tool; fundraising requires specific, deep financial modeling and market data integration that is outside their core competency.

## Key Data Points

- [...]
- Visual Suggestion: A 2x2 Matrix: X-axis = Cost (Low to High), Y-axis = Strategic Insight (Low to High). Plot Trello (Low/Low), Consultants (High/High), and Fundability AI (Low/High - The Sweet Spot).

## Expected Objections

- [...]
- Building a Moat Through Data & Workflow
  - Content: Our defensibility strategy relies on three pillars: a proprietary 'Abstraction Layer' that prevents vendor lock-in to any single LLM, a 'Verification Layer' that ensures financial accuracy (a critical barrier to entry for simple wrappers), and high switching costs created by storing the founder's entire operational history. As we scale, our aggregated data on 'what makes a fundable idea' will become a proprietary asset impossible to replicate.
  - Section: Defensibility
  - Slide Number: 4
  - Source Steps: 4, 7
  - Bullet Points: Proprietary 'Abstraction Layer' ensures model-agnostic flexibility, 'Verification Layer' eliminates AI hallucination in financial models, High switching costs: Platform becomes the 'Single Source of Truth', Data Network Effects: More users = smarter validation algorithms
  - Speaker Notes: Investors worry about 'wrapper' companies. You must explain that the magic isn't the AI model itself, but the \*orchestration\* of the data and the \*verification\* of the math. This is hard engineering. Anticipated Objection: 'Is the patent filed?' Answer: We are prioritizing 'Trade Secret' protection via our Abstraction Layer architecture, with patents to follow post-MVP.

## Key Data Points

- [...]
- Visual Suggestion: Diagram showing 'Input Data' passing through a 'Black Box' (Our Abstraction/Verification Layers) and emerging as 'Verified Output', surrounded by a shield labeled 'Switching Costs'.

## Expected Objections

- [...]
- Built for Execution
  - Content: Currently led by a solo founder with a clear technical vision, we are actively looking to complete the core leadership team. We are seeking a technical Lead to own the 'Abstraction Layer' architecture and a Growth Lead to drive our 'Trust-First' GTM strategy. We are supported by an advisory board structure designed to leverage SaaS and AI expertise.
  - Section: Team
  - Slide Number: 5
  - Source Steps: 3
  - Bullet Points: Founder: Defined technical architecture and product roadmap, Key Hires: Actively recruiting CTO and Growth Lead, Advisory Board: Structured to fill gaps in SaaS/AI domain knowledge, Culture: Disciplined 'Wizard of Oz' approach to capital efficiency

- Speaker Notes: Honesty wins here. Don't oversell a team that doesn't exist yet. Pitch the \*vision\* of the team and the discipline of the founder in identifying the right gaps. 'Bet on the jockey'—show you know what you don't know. Anticipated Objection: 'Who is building this?' Answer: I have defined the architecture and am executing a 'Wizard of Oz' MVP to validate demand before hiring the full engineering team.

## Key Data Points

- [...]
- Visual Suggestion: Org Chart showing Founder in the center, with 'CTO' and 'Growth Lead' roles as outlined 'ghost' figures, indicating immediate hiring priority.

## Expected Objections

- [...]
- Capturing the \$5.5B Validation Economy
  - Content: We operate in the intersection of the Global SaaS and Business Consulting markets. Our Serviceable Addressable Market (SAM) is the \$5.5B 'Early-Stage Startup Ecosystem' specifically seeking validation tools. We will capture this through a tiered SaaS model, starting with a 'Lead Magnet' free score and converting users to paid subscriptions as they require deeper reporting.
  - Section: Business Plan
  - Slide Number: 6
  - Source Steps: 5, 6, 8
  - Bullet Points: TAM: £42.5B (Global SaaS & Consulting), SAM: £5.5B (Early-Stage Startup Validation), SOM: £275M (5% of SAM, Tech-focused founders), Revenue Model: Tiered Subscription (Ideator to Fundable)
  - Speaker Notes: Walk investors through the funnel. We start broad with the TAM, narrow down to the SAM (people actually raising money), and focus on the SOM (people who use tech tools). The 'Idea Score' is the hook to capture the SOM. Anticipated Objection: 'Why not target the whole market?' Answer: To achieve 20x growth, we must dominate a niche (Tech Founders) first before expanding to generalists.

## Key Data Points

- [...]
- Visual Suggestion: Three concentric circles graph (TAM/SAM/SOM) with specific £ values labeled. A smaller circle inside SOM labeled 'Beachhead: 600k Founders'.

## Expected Objections

- [...]
- Validating the Path to Product-Market Fit
  - Content: We are currently in the 'Idea/Concept' phase, having completed the technical architecture and defined the product roadmap. Our immediate next step is the 'Wizard of Oz' MVP launch, designed to capture qualitative feedback and validate the core value proposition without heavy upfront capital. We have identified a clear funnel strategy: Awareness -> Lead Magnet (Free Score) -> Paid Conversion.
  - Section: Traction
  - Slide Number: 7
  - Source Steps: 1, 4, 12
  - Bullet Points: Stage: Concept / Architecture Complete, Roadmap: Modular dual-mode engine defined, Strategy: 'Wizard of Oz' MVP to minimize risk, Funnel: 'Trust-First' model targeting 5%

conversion

- Speaker Notes: Investors need to know what is real vs. what is a slide deck. Be transparent: 'We have the blueprint, now we need to build the house.' The traction here is the \*strategic clarity\* and the \*funnel math\* derived from market benchmarks. Anticipated Objection: 'You have no users?' Answer: We have identified the exact funnel metrics (40% lead magnet conversion) needed to make the unit economics work, and we are launching the MVP to prove them.

## Key Data Points

- [...]
- Visual Suggestion: Timeline graphic: 'Past' (Architecture Defined, Market Analysis), 'Present' (MVP Build), 'Future' (First 100 Users, Product Market Fit).

## Expected Objections

- [...]
- £500k for 20% Equity to Secure Market Entry
  - Content: We are raising £500,000 to bridge the gap between concept and market leader. These funds will be allocated primarily to MVP development (building the Abstraction Layer) and initial GTM efforts to acquire our first 100 customers. Our valuation of £2.5M is supported by the Scorecard and Comparable methods, factoring in the £42.5B market opportunity and current execution risk.
  - Section: The Deal
  - Slide Number: 8
  - Source Steps: 13, 14
  - Bullet Points: Raising: £500,000 (Pre-Seed), Valuation: £2.5M Pre-Money, Use of Funds: 50% Engineering, 30% Marketing, 20% Ops, Instrument: SEIS/EIS eligible (Advance Assurance pending)
  - Speaker Notes: Be firm on the valuation. £2.5M is standard for a pre-revenue SaaS with this market potential. Highlight the SEIS/EIS eligibility as a major tax benefit for UK investors. Anticipated Objection: 'That's high for no revenue.' Answer: This valuation prices in the £42.5B opportunity and the fact that we are de-risking the 'build' phase with a Wizard of Oz strategy.

## Key Data Points

- [...]
- Visual Suggestion: Simple pie chart showing 'Use of Funds' (Engineering, Marketing, Ops). Text overlay: '16.6% Ownership for £500k'.

## Expected Objections

- [...]
- Positioned for Strategic Acquisition
  - Content: The startup ecosystem is consolidating, with major players like Stripe, HubSpot, and Microsoft actively acquiring 'picks and shovels' for the creator economy. We aim to build a defensible platform with 5% SAM penetration, making us an attractive acquisition target for a major CRM or Project Management platform looking to own the 'Pre-Seed' customer journey.
  - Section: Exit Strategy
  - Slide Number: 9
  - Source Steps: 5, 11, 14
  - Bullet Points: Target Exit: Strategic Acquisition (SaaS Majors), Potential Acquirers: HubSpot, Atlassian, Salesforce, Projected Multiple: 5x - 10x Revenue (SaaS Standard), Timeline: 5-7 years to

Exit

- Speaker Notes: Angels want to know how they get their money back. Paint the picture: We own the customer at the very beginning of their journey. Companies like HubSpot pay a premium to own that data. Anticipated Objection: 'What if you don't get acquired?' Answer: With a £275M SOM and high margins, we have the potential to be a standalone cash-cow or IPO candidate, though acquisition is the most likely liquidity event.

## Key Data Points

- [...]
- Visual Suggestion: Timeline ending in a 'Flag' icon labeled 'Exit'. Below, logos of potential acquirers (HubSpot, Atlassian, etc.) connected by arrows to 'Data Source'.

## Expected Objections

- [...]
- The Ask: We are raising £500,000 at a £2.5M pre-money valuation to build the MVP, validate the 'Wizard of Oz' workflow, and secure our first 100 paying customers.
- Tagline: Automating the transition from 'Napkin Idea' to 'Fundable Startup'.
- Warnings: Team section requires specific founder details to be filled in before final presentation., Valuation is aggressive for pre-revenue; be prepared to defend with £42.5B market size., SEIS status is 'needs-review'; do not guarantee tax relief to investors until confirmed.
- Company Name: Fundability AI
- Tone Guidance: Confident yet grounded. Use data to back up every claim. Acknowledge the early stage honestly but frame it as a disciplined capital-efficiency play rather than a weakness. Be transparent about risks (like the 'Wrapper' risk) to build trust.
- Narrative Flow: The deck begins by establishing the emotional pain of the 'Valley of Death' (Problem), creating a vacuum that only our 'Chief of Staff' AI can fill (Solution). We then distinguish ourselves from passive tools and expensive consultants (Competition) before explaining the technical 'moats' that protect our business (Defensibility). We introduce the disciplined leadership executing this vision (Team) and size the massive financial opportunity (Business Plan). We ground the vision in reality with our capital-efficient MVP strategy (Traction), present the specific investment opportunity (The Deal), and conclude with the clear path to investor returns (Exit).
- Estimated Duration: 12-15 minutes total: Problem 1.5min, Solution 2min, Competition 1min, Defensibility 1min, Team 2min, Business Plan 2min, Traction 1min, The Deal 1.5min, Exit 1min

## Investor Q A

### Weak Spots

- 1.
  - Area: Team Composition
  - Concern: Sole founder with no technical co-founder identified or hired. High execution risk for an AI/Deep-tech product.
  - Severity: significant
  - How To Address: Emphasize the specific recruitment plan for the CTO. Offer significant equity stake. Consider a fractional CTO or technical advisor in the interim.
- 2.
  - Area: Technical Feasibility (Hallucinations)
  - Concern: Product relies on LLMs generating financial data. 'Hallucinations' could destroy trust

immediately if the first report is wrong.

- Severity: significant
- How To Address: Highlight the 'Verification Layer' architecture. Offer a 'Human-in-the-loop' guarantee for the first cohort to manually check outputs.
- 3.
  - Area: Defensibility (Wrapper Risk)
  - Concern: The product could be perceived as a 'thin wrapper' around GPT-4, which OpenAI or competitors could replicate easily.
  - Severity: moderate
  - How To Address: Focus on the proprietary workflow, the 'Abstraction Layer', and the proprietary data set gathered from users (the 'Data Moat').
- 4.
  - Area: Pre-Revenue Valuation
  - Concern: Asking for £2.5M pre-money with zero revenue and just an idea/deck is aggressive for the current market.
  - Severity: moderate
  - How To Address: Use the Comparables/Scorecard justification. Be prepared to negotiate on valuation or offer better terms (e.g., SEIS).
- 5.
  - Area: Customer Acquisition Cost (CAC)
  - Concern: GTM relies on content/SEO, which is slow. Paid ads are risky without validated LTV/CAC metrics.
  - Severity: minor
  - How To Address: Reiterate the 'Trust-First' organic strategy and the 'Idea Score' viral loop to keep CAC low initially.
- 6.
  - Area: Founder Experience (Unknown)
  - Concern: Founder CV and industry experience are marked 'Awaiting Input'. Investors cannot bet on the jockey if they don't know the track record.
  - Severity: moderate
  - How To Address: Complete the CV immediately. If no direct startup exits, highlight relevant operational experience or 'scar tissue' from previous failures.
- Negotiation Tips: Anchor the valuation at £2.5M using the Comparables method, but keep a 'walk away' price in mind (e.g., £1.8M) to avoid a prolonged negotiation that kills momentum., Leverage SEIS/EIS. This is your biggest weapon. It effectively reduces the investor's risk by 30-50%, allowing you to justify a higher premium on the valuation., Offer a 'MFN' (Most Favored Nation) clause to early angels. If they invest now, they get the same terms (or better) as future VCs, protecting them from dilution in the Seed round., If an investor pushes back on the 'Idea Stage' valuation, shift the conversation to 'Option Value'. 'You aren't paying for what I have today; you are paying for the option to own 20% of a company that solves a £5.5bn problem.', Be transparent about the 'CTO Search'. Investors often have networks. Ask them: 'I am looking for a world-class technical lead. Do you know anyone who might be a fit for this equity?' This turns a weakness into a value-add for the investor., Avoid 'Convertible Notes' with no cap if possible. A SAFE with a valuation cap (e.g., £3M-£4M) is cleaner for pre-seed and aligns interests better., Always ask for 'Soft Circle' commitments. 'If I can get one more lead investor to commit at this term, would you be in?' This creates FOMO (Fear Of Missing Out).

## Anticipated Questions

- 1.
  - Category: Product



- Question: How exactly does your AI validate an idea better than a human consultant?
- Difficulty: standard
- Model Answer: Unlike a consultant who provides a single point of view based on limited experience, our platform aggregates data from thousands of successful startups and VC pattern matching. We don't just give advice; we generate the actual deliverables—financial models, lean canvases, and pitch decks—instantly. It's not about replacing human judgment entirely, but about providing a data-driven 'first pass' that eliminates 80% of the noise founders typically face.
- Supporting Data: Step 2 (10x Test: Replaces \$20k/8-week consulting engagement with minutes-long SaaS interaction).
- Weak Area Reference: Product Value Proposition
- 2.
  - Category: Competition
  - Question: Why can't I just use ChatGPT to do this for \$20/month?
  - Difficulty: tough
  - Model Answer: You can use ChatGPT, but you'll get generic hallucinations. Founders using raw LLMs spend more time prompting and fact-checking than actually working. Our IP is the 'Fundraising Readiness' workflow and the deterministic verification layer. We structure the data specifically for investor scrutiny, integrating APIs for real-time market sizing (SEO/App Store data) that a general LLM cannot access reliably.
  - Supporting Data: Step 2 (Competitor Analysis: Generic AI lacks specialized workflow). Step 4 (Tech Stack: Abstraction/Verification Layer).
  - Weak Area Reference: Defensibility / Wrapper Risk
- 3.
  - Category: Market
  - Question: Who is your ideal customer and how do you plan to reach them cheaply?
  - Difficulty: standard
  - Model Answer: Our beachhead is the 'Technical Solo Founder'—someone aged 25-40, consuming YC/IndieHackers content, building B2B SaaS. They are currently underserved by expensive agencies. We reach them via 'Trust-First' content marketing and a free 'Idea Score' lead magnet. This filters out hobbyists and attracts those serious about validation.
  - Supporting Data: Step 6 (User Profiles: Technical Solo Founder). Step 12 (GTM: Trust-First methodology).
  - Weak Area Reference: GTM Strategy
- 4.
  - Category: Team
  - Question: It looks like it's just you right now. Do you have a technical co-founder?
  - Difficulty: tough
  - Model Answer: Currently, I am the sole founder focused on product vision and customer discovery. I have a technical architecture defined (React/Python/LLM stack). This raise is specifically earmarked to bring on a Lead Engineer/CTO to execute the 'Wizard of Oz' MVP and build the verification layer. I am open to a co-founder arrangement or a key technical hire with equity.
  - Supporting Data: Step 3 (Team: CTO role identified as critical gap/filled: false). Step 14 (Use of Funds: Build MVP).
  - Weak Area Reference: Team Gaps
- 5.
  - Category: Financials
  - Question: How much cash do you need to reach profitability, and what is your burn rate?
  - Difficulty: standard
  - Model Answer: We are raising £500k to give us 18-24 months of runway. This covers building the MVP, validating the 'Wizard of Oz' workflow with 100 paying customers, and initial marketing. We



project a monthly burn of roughly £25k-£30k once the team is hired, allowing us to hit key milestones before needing to raise again.

- Supporting Data: Step 14 (Financials: Raise £500k at £2.5M valuation). Step 4 (Build Cost MVP: £50k-£100k).
- Weak Area Reference: Financial Projections
- 6.
  - Category: Product
  - Question: What stops the AI from 'hallucinating' bad financial data in the models?
  - Difficulty: tough
  - Model Answer: This is our primary technical differentiator. We are not just prompting an LLM; we are building a deterministic 'Verification Layer.' While the LLM handles the text and structure, the actual math and logic are processed by code that checks for consistency and sanity. We constrain the LLM's output to ensure the financial models are mathematically sound.
  - Supporting Data: Step 4 (Technical Debt: Verification Layer mitigation plan).
  - Weak Area Reference: Technical Risk
- 7.
  - Category: Strategy
  - Question: Why now? Why hasn't this been built before?
  - Difficulty: standard
  - Model Answer: Two reasons: 1) The rise of capable LLMs (GPT-4/Claude) finally allows for high-quality text generation and synthesis. 2) The 'AI Winter' is over; founders are now desperate to cut costs and move faster. The market is flooded with 'false confidence' from easy AI, creating a massive need for a tool that provides \*objective\* validation rather than just generated text.
  - Supporting Data: Step 1 (Problem: False confidence/Analysis paralysis).
  - Weak Area Reference: Timing
- 8.
  - Category: Business Model
  - Question: Your pricing seems low compared to consultants. Can you make the unit economics work?
  - Difficulty: tough
  - Model Answer: Yes, because our marginal cost of delivery is near zero. Unlike consultants who sell time, we sell software. The 'Ideator' tier is designed to be a low-friction entry point, but our revenue focus is on the 'Validator' tier (£149/mo) where the value prop (investor-ready materials) justifies the price. We rely on high volume and automation, not billable hours.
  - Supporting Data: Step 8 (Pricing: Tiers from £19 to £149, aligned with founder maturity).
  - Weak Area Reference: Pricing & Unit Economics
- 9.
  - Category: Competition
  - Question: What if Notion or Asana adds an 'AI Validation' feature?
  - Difficulty: tough
  - Model Answer: Notion and Asana are 'repositories'—they are great for managing work \*after\* it's defined. They are passive tools. We are an 'active agent' designed to help you decide \*what\* to build. It is a different mental model. They won't build this because their core value is organization, not strategic validation. If they did, they would likely acquire us.
  - Supporting Data: Step 2 (Competitor Weaknesses: Passive repositories, no validation mechanism).
  - Weak Area Reference: Competition / Incumbents
- 10.
  - Category: Legal
  - Question: Do you have SEIS/EIS advance assurance? This is critical for UK angels.
  - Difficulty: standard

- Model Answer: We are currently incorporated in the UK and meet the preliminary criteria (age < 2 years, assets < £350k). We are preparing the Advance Assurance application immediately. We expect to have this secured or well underway before the round closes to ensure you receive the tax relief.
- Supporting Data: Step 13 (SEIS/EIS: Eligible 'needs-review', criteria met).
- Weak Area Reference: Tax & Legal
- 11.
  - Category: Product
  - Question: How do you acquire the data to score an idea? Is it just public web scraping?
  - Difficulty: tough
  - Model Answer: We use a hybrid approach. We utilize public APIs (SEO data, App Store rankings) for external market signals, and we combine this with the user's internal inputs. Crucially, our 'Wizard of Oz' phase allows us to manually train the model on what a 'good' idea looks like, effectively crowdsourcing our proprietary dataset from early users.
  - Supporting Data: Step 1 (Traction: Wizard of Oz MVP strategy). Step 4 (Tech: RAG Context/Vector DB).
  - Weak Area Reference: Data Strategy
- 12.
  - Category: Financials
  - Question: You are pre-revenue. How do you justify a £2.5M valuation?
  - Difficulty: tough
  - Model Answer: The valuation is based on the Scorecard and Comparables method, looking at similar pre-revenue SaaS tools in the startup ecosystem. We are pricing for a 20x return potential on a £50M+ exit within our SAM. We are not charging for the code that exists today, but for the market opportunity and the execution roadmap to capture 5% of a £5.5bn market.
  - Supporting Data: Step 14 (Valuation: Scorecard/Comparable method £2.5M). Step 5 (Market: £5.5bn SAM).
  - Weak Area Reference: Valuation
- 13.
  - Category: Team
  - Question: What is your background and why are you the right person to build this?
  - Difficulty: standard
  - Model Answer: [Answer depends on Founder's actual input - Placeholder Strategy]. I have [X] years experience in [SaaS/Startups], where I learned [specific pain point]. I have personally experienced the 'Valley of Death' and the frustration of bad consulting. I am building this because I lived it.
  - Supporting Data: Step 3 (Team: Founder input required).
  - Weak Area Reference: Founder Fit
- 14.
  - Category: Strategy
  - Question: What happens if you run out of money before finding Product-Market Fit?
  - Difficulty: tough
  - Model Answer: Our £500k raise gives us significant runway (18-24 months). However, our 'Wizard of Oz' strategy is designed to be capital efficient. By manually servicing the first customers, we avoid burning £100k on engineering before we know what works. If we hit a wall, we have a modular tech stack that allows us to pivot the specific application without rewriting the core engine.
  - Supporting Data: Step 1 (Traction: Wizard of Oz strategy). Step 12 (Warnings: Avoiding full build before validation).
  - Weak Area Reference: Running Out of Money
- 15.
  - Category: Sales

- Question: How do you sell to 'Corporate Innovators' who have long sales cycles?
- Difficulty: standard
- Model Answer: Initially, we aren't targeting enterprise contracts. We target 'Intrapreneurs' using our self-serve tier. They use their personal or corporate credit card to solve an immediate problem. Once we have traction within an organization, we can approach procurement for an enterprise license, but our entry is always bottom-up, self-serve.
- Supporting Data: Step 8 (Sales Model: Self-serve, 3-5 day cycle).
- Weak Area Reference: GTM / Sales Cycle
- 16.
  - Category: Product
  - Question: Is your tech model-agnostic? What happens if OpenAI goes bankrupt or changes prices?
  - Difficulty: tough
  - Model Answer: Yes, we are building an 'Abstraction Layer' immediately. This allows us to swap the underlying LLM (GPT-4, Claude, Llama) without changing the user experience. This protects our margins and ensures we aren't held hostage by a single vendor's pricing or uptime.
  - Supporting Data: Step 4 (Tech Stack: Abstraction layer mitigation).
  - Weak Area Reference: Technical Risk / Vendor Lock-in
- 17.
  - Category: Strategy
  - Question: What is your zombie risk? How do you avoid becoming a small lifestyle business?
  - Difficulty: tough
  - Model Answer: The zombie risk is high if we only serve 'Ideators' at £19/month. That is why our core strategy is the 'Upsell' to the 'Validator' tier. We are not a productivity tool; we are a 'Fundability' tool. We align our success with the founder's ability to raise money, which creates a high-value transactional relationship, not just a subscription.
  - Supporting Data: Step 8 (Warnings: High churn in bottom tier).
  - Weak Area Reference: Zombie Risk
- 18.
  - Category: Financials
  - Question: What are your key assumptions for the £27.5M SOM?
  - Difficulty: standard
  - Model Answer: We assume we can capture 5% of the 'Early-Stage Startup Ecosystem' (SAM) that actively seeks validation tools. This assumes we penetrate the US and UK markets effectively and retain users through the fundraising cycle. We have buffered this down from the total TAM to be conservative.
  - Supporting Data: Step 5 (Market: SOM £27.5M, 5% of SAM).
  - Weak Area Reference: Market Assumptions
- 19.
  - Category: Team
  - Question: If I invest, do you have a vesting schedule in place?
  - Difficulty: standard
  - Model Answer: Yes. We are implementing a standard 4-year vesting schedule with a 1-year cliff for all founders. This ensures long-term commitment and protects the company (and investors) if a founder leaves early.
  - Supporting Data: Step 3 (Team: Role agreements and vesting required).
  - Weak Area Reference: Legal / Team Structure
- 20.
  - Category: Product
  - Question: How do you ensure the 'Wizard of Oz' manual service doesn't become a bottleneck?
  - Difficulty: tough

- Model Answer: The manual service is strictly for data collection and training. We cap the number of 'Wizard of Oz' users to ensure quality. As we gather data, we automate the responses. The moment the automation passes the quality threshold of the manual service, we switch the user over. The manual phase is temporary by design.
- Supporting Data: Step 1 (Traction: Wizard of Oz for qualitative feedback).
- Weak Area Reference: Scalability
- (5 more items)

## Due Diligence Checklist

- 1.
  - Notes: Ensure Articles restrict share classes to Ordinary (for SEIS/EIS compliance).
  - Status: needs-preparation
  - Category: Legal
  - Document: Certificate of Incorporation & Articles of Association
- 2.
  - Notes: Critical to show investors you are committed long-term.
  - Status: needs-preparation
  - Category: Legal
  - Document: Founder Vesting Agreement (4-year, 1-year cliff)
- 3.
  - Notes: Ensure any code/wireframes created so far are owned by the company, not the founder personally.
  - Status: needs-preparation
  - Category: Legal
  - Document: Intellectual Property Assignment Agreement
- 4.
  - Notes: Submit to HMRC ASAP. Do not close the round without this or investors will walk away.
  - Status: needs-preparation
  - Category: Tax
  - Document: SEIS/EIS Advance Assurance Application
- 5.
  - Notes: Must support the valuation and show clear use of the £500k funds.
  - Status: needs-preparation
  - Category: Financial
  - Document: 3-Year Financial Forecast (P&L, Cash Flow, Balance Sheet)
- 6.
  - Notes: Clean spreadsheet showing current ownership and post-investment percentages.
  - Status: needs-preparation
  - Category: Financial
  - Document: Cap Table (Shareholder Register)
- 7.
  - Notes: You have the high-level stack defined (React/Python/LLM); formalize it into a slide.
  - Status: ready
  - Category: Product
  - Document: Technical Architecture Diagram
- 8.
  - Notes: Even if pre-product, have notes from 10-20 founder conversations proving the pain point.
  - Status: needs-preparation
  - Category: Market

- Document: Customer Interviews / Validation Data
- 9.
  - Notes: Fill in the gaps in Step 3. Verify past employment and outcomes.
  - Status: needs-preparation
  - Category: Team
  - Document: Founder CVs & References

Total Steps: 18

## Use Of Funds

- 1.
  - Amount: 15000000
  - Category: Product Development
  - Percentage: 0.5
  - Justification: Hire lead AI engineer and data architect to build proprietary model and integrate exclusive senior investor datasets.
- 2.
  - Amount: 9000000
  - Category: Sales & Marketing
  - Percentage: 0.3
  - Justification: Validate product-market fit by acquiring first 10 pilot customers and proving the 3x LTV:CAC ratio.
- 3.
  - Amount: 6000000
  - Category: Operations & Overhead
  - Percentage: 0.2
  - Justification: Cover server costs, proprietary data licensing fees, and founder living expenses for 24 months.

## Gtm Strategy

### Warnings

- 1.
  - Reason: Without validated messaging and conversion data, ad spend will exceed LTV. We avoid this by forcing organic validation first to establish a baseline Cost Per Lead.
  - Pitfall: Relying on paid performance marketing (Meta/Google Ads) too early
- 2.
  - Reason: This leads to high churn as hobbyists waste resources. We avoid this by strictly targeting 'Technical Solo Founders' and 'Pre-Seed Teams' who have already committed capital/time.
  - Pitfall: Targeting 'anyone with an idea' (Broad segmentation)
- 3.
  - Reason: Engineering costs would burn cash before finding PMF. We avoid this by manually generating the first reports to ensure the output is actually valuable to investors.
  - Pitfall: Building the full AI suite before validating the 'Wizard of Oz' service

## Sales Funnel

## Stages

- Awareness (Top of Funnel)
- [...]
- Lead Magnet (Idea Score)
- [...]
- Activated User (Free Trial/Freemium)
- [...]
- Paid Conversion
- [...]
- Gtm Narrative: Our GTM strategy rejects the 'spray and pray' mass-marketing approach typical of early-stage startups. Instead, we employ a 'Trust-First' methodology. By targeting the psychological pain point of 'false confidence' with a free, objective 'Idea Score,' we lower the barrier to entry. We acquire our first 100 customers through high-touch, low-cost community infiltration (IndieHackers, LinkedIn) where validation is a current hot topic. As we gather data and social proof, we transition to Product-Led Growth, allowing the quality of the 'Deep Dive' reports to drive virality. This ensures our CAC remains well below our LTV, proving unit economics before we pour capital into paid scales.

## Scaling Phases

- 1.
  - Phase: Phase 1: Trust & Validation (Months 1-6)
  - Timeframe: 6 Months
  - Expected C A C: 2500
  - Key Activities: Wizard of Oz MVP delivery, Publish 'State of Startup Failure' report, Secure 3 accelerator partnerships
  - Primary Channel: Manual Community Engagement & SEO
  - Target Customers: 100
- 2.
  - Phase: Phase 2: Product-Led Growth (Months 7-18)
  - Timeframe: 12 Months
  - Expected C A C: 1200
  - Key Activities: Automate 'Deep Dive' reporting, Launch 'Embeddable Idea Score' widget for blogs, Implement referral program (1 month free for 1 signup)
  - Primary Channel: Content Marketing & Viral Loops
  - Target Customers: 1500
- 3.
  - Phase: Phase 3: Scale & Retention (Months 19-30)
  - Timeframe: 12 Months
  - Expected C A C: 8000
  - Key Activities: Scale Google Ads (high intent keywords only), Launch 'Fundable' tier upgrade campaigns, Focus on Churn reduction to extend LTV
  - Primary Channel: Paid Acquisition & Retargeting
  - Target Customers: 5000

## Cac Viability Test

- Ltv: 45000
- Ratio: 3
- Total C A C: 15000

- Rationale: The model assumes a 3-month average customer lifespan (based on 8% monthly churn) for the initial tier. LTV of £45 vs CAC of £15 yields a 3:1 ratio, which is the minimum viable threshold for SaaS. We will improve this by driving down churn.
- Sustainable: Yes

## First100 Customers

### Channels

- Founder Community Infiltration (IndieHackers/Reddit)
- [...]
- University & Accelerator Partnerships
- [...]
- SEO-Driven 'Idea Score' Lead Magnet
- [...]
- Direct LinkedIn Outreach to Pre-Seed Founders
- [...]
- Timeline: Months 1-6 (Execution Phase)
- Key Milestones: Validate 'Wizard of Oz' MVP with 20 users by Month 2, Achieve Product-Market Fit signal (40% activation rate) by Month 4, Secure first 10 paid 'Fundable' tier customers by Month 6

Raise Amount: 30000000

## Sensitivity

### Base

- Description: Standard growth model with 2.5% monthly churn and consistent sales execution.
- Year5 Revenue: 135000000

### Best

- Description: Aggressive expansion with viral adoption and upsell opportunities maximizing LTV.
- Year5 Revenue: 202500000

### Worst

- Description: Conservative churn of 5% and slower sales velocity due to market entry friction.
- Year5 Revenue: 81000000

## Failure Modes

- 1.
  - Mode: Not Enough Product Need
  - Owner: CEO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Immediately conduct structured customer interviews with 30 senior investors to validate the specific pain points our proprietary dataset addresses. Pivot the product definition based on the top 3 recurring needs identified.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
  - [...]
- 2.
  - Mode: Running Out of Money
  - Owner: CFO
  - Score: 8
  - Impact: 5
  - Status: open
  - Mitigation: Implement aggressive cash conservation measures immediately. Reduce monthly burn to £1.2M by pausing non-essential hires. Initiate a bridge raise or convertible note discussion 6 months prior to the cliff.
  - Probability: 0.8

## Evidence From Prior Steps

- 1.
  - [...]
- 2.
  - [...]
- 3.
  - Mode: Gaps in the Team
  - Owner: CEO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Audit current capabilities against the 'AI Development' and 'Enterprise Sales' requirements. Hire a fractional CTO and Sales Lead immediately to plug the gap before the full-time headcount scales up.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
  - [...]
- 2.
  - [...]
- 4.
  - Mode: Competition
  - Owner: CPO
  - Score: 5
  - Impact: 4
  - Status: open
  - Mitigation: Complete a feature-gap analysis against Bloomberg Terminal and standard LLMs. Emphasize the unique value of the 'senior investor supplied datasets' as the primary differentiator in all pitch materials.
  - Probability: 0.6



## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 5.
  - Mode: Fast Followers
  - Owner: CTO
  - Score: 6
  - Impact: 4
  - Status: open
  - Mitigation: Focus on 'Data Network Effects'—the more the system is used, the smarter the model gets. Lock in key customers with long-term contracts now to build a data lead before incumbents react.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 6.
  - Mode: Pricing Problems
  - Owner: CFO
  - Score: 4
  - Impact: 4
  - Status: open
  - Mitigation: Adopt a value-based pricing model tied directly to ROI (e.g., % of assets under management or deal value saved). Offer a pilot program to validate willingness to pay at the £25k level.
  - Probability: 0.5

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 7.
  - Mode: Prototype to Product Failure
  - Owner: CTO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Define the v1.0 architecture specifically for scalability (cloud-native, modular). Conduct a third-party technical review of the in-house model to ensure it can handle concurrent user loads before launch.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 8.
  - Mode: Poor Product Timing
  - Owner: CMO
  - Score: 4
  - Impact: 4
  - Status: open
  - Mitigation: Analyze search trends and adoption rates for similar 'AI in Fintech' tools. If the market is lukewarm, position the product as a 'Cost Reduction' tool (recession-proofing) rather than just 'Innovation'.
  - Probability: 0.5

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 9.
  - Mode: Loss of Focus
  - Owner: CEO
  - Score: 3
  - Impact: 4
  - Status: open
  - Mitigation: Strictly define the 'Ideal Customer Profile' (ICP) and reject meetings outside this profile for the first 12 months. Board reviews will focus solely on metrics related to this ICP.
  - Probability: 0.4

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 10.
  - Mode: Go-To-Market Failure
  - Owner: CRO
  - Score: 7
  - Impact: 5
  - Status: open
  - Mitigation: Shift from direct sales to a high-touch partnership model with existing financial data providers (e.g., Bloomberg, Refinitiv) to lower CAC. Implement an automated lead nurturing system to qualify leads before human contact.
  - Probability: 0.7

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 11.
  - Mode: Co-Founder Conflict
  - Owner: Board
  - Score: 3
  - Impact: 5
  - Status: open
  - Mitigation: Formalize a Founder Agreement with 4-year vesting and 1-year cliff. Establish a weekly 'Founders Alignment' meeting to discuss ideology and strategy differences before they escalate.
  - Probability: 0.3

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]
- 12.
  - Mode: Zombie Corporation
  - Owner: CFO
  - Score: 6
  - Impact: 5
  - Status: open
  - Mitigation: Set 'Unit Economic Profitability' as the primary goal for Year 2, rather than just revenue growth. Ensure the £30M raise covers the path to cash-flow positive or a clear Series B milestone.
  - Probability: 0.6

## Evidence From Prior Steps

- 1.
- [...]
- 2.
- [...]

Initial\_idea: A modular AI-powered SaaS platform for early-stage founders that functions as a virtual Chief of Staff. The platform features a dual-mode engine: a '5-Minute Sprint' for rapid hypothesis testing using Lean Startup methodologies, and a 'Deep Dive' accelerator that autonomously generates 6-pillar validation reports, financial models, and competitor landscapes. The system includes a 'Fundraising Readiness Room' that auto-generates pitch decks and investor narratives based on the validated data, featuring a model-agnostic backend to swap specific LLMs for different output qualities.

Problem: First-time founders and corporate innovators suffer from 'false confidence' (building things nobody wants) and 'analysis paralysis' (getting stuck in research mode). Existing tools are disconnected; Trello manages tasks but doesn't validate ideas, while consultants are expensive and slow. There is no centralized, cost-effective solution that bridges the gap between a rough napkin sketch and an investor-ready business plan.

Value proposition: Unlike generic business plan templates or static checklists, this platform functions as an active co-founder. It bridges the gap between ideation and execution by turning subjective brainstorming into objective, data-backed validation scores. By offering a seamless transition from a 'quick check' to a

'comprehensive investor deck,' it eliminates the friction of starting over and significantly reduces the time and cost associated with traditional market research.

Target market: Primary: Solopreneurs, 'Wantrepreneurs', and Micro-SaaS founders seeking their first product-market fit. Secondary: Innovation teams in SMEs requiring rapid feasibility reports for internal projects. Tertiary: Incubators and Accelerators looking for a standardized curriculum tool to vet their cohorts.

## Ip And Patents

- Has I P: No
- Patent Status: None identified
- Trade Secrets: Training methodologies, Data pipeline architecture, The specific composition of the investor datasets
- Patent Strength: none

## Market Sizing

### Top Down

#### Sam

- Value: 5500000000

#### Citation

- [...]
- Currency: GBP
- Reasoning: Filtered to the 'Early-Stage Startup Ecosystem' (founders raising Pre-Seed to Series A) and the 'Virtual Assistant/AI Automation' subset of the consulting market. This represents the segment actively seeking validation and automation tools.

#### Som

- Value: 275000000

#### Citation

- [...]
- Currency: GBP
- Reasoning: Targeting 5% of the SAM. This assumes capturing a niche of tech-focused solo founders and SMEs who are 'AI-native' and actively automating their due diligence process, excluding non-technical traditional businesses.

#### Tam

- Value: 42500000000

#### Citation

- [...]
- Currency: GBP
- Methodology: Derived from the global SaaS market size (~\$300B) and the global Business

Consulting market (~\$350B), converting to GBP and taking 80% to account for the specific addressable sectors of technology and business services.

## Bottom Up

### Assumptions

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Methodology: Calculated as (Annual Active Startups x AI-Adoption Rate) x SaaS Subscription Fee. Focuses on the immediate volume of companies that can be served digitally without high-touch sales.
- Market Opportunity: 180000000
- Target Customer Count: 600000
- Average Annual Revenue: 300
- Retained Revenue Percentage: 1
- Warnings: CRITICAL: The Year 7 ARR projection (£60m) falls below the £100m investor threshold for a 'venture scale' return. To achieve a £100m ARR, the platform must either increase pricing (Enterprise tiers) or expand the scope beyond 'Early Stage' into 'Growth Stage' corporate innovation., The 'Consulting Replacement' value prop is strong, but pricing at £25/mo requires very high volume (50k+ users) to hit significant revenue milestones. Consider a high-ticket 'Done-For-You' tier., Customer churn risk is high in the 'Valley of Death' segment as many startups fail before they can pay for the full year.

### Growth Rate

- Value: 1.2

### Citation

- Year: 2024
- Source: Industry Standard SaaS CAGR for Early Stage Vertical AI
- Source Url: <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights>
- Confidence: medium
- Source Type: analyst

### Arr Potential

- Year3: 2500000
- Year5: 15000000
- Year7: 60000000
- Meets Minimum Threshold: No

### Timeline View

### Total Market

- Size: 180000000
- Timeframe: Year 4-7+

- Description: Global 'Co-founder OS' for all early-stage ventures, displacing traditional consulting for this segment.

## Launch Market

- Size: 3000000
- Timeframe: Year 1-2
- Description: UK & US Solo Founders validating ideas. Capturing 1,000 paying customers at £25/mo.

## Expansion Market

- Size: 45000000
- Timeframe: Year 2-4
- Description: Expansion to EU and inclusion of Micro-SMEs (teams <5) using the 'Fundraising Room' feature.
- Unit Of Measurement: GBP (annualised retained revenue)

## Prior Funding

- Raised: 0
- Sources: Bootstrapped
- Current Cap Table: 100% Founders

## Revenue Model

- Warnings: High churn in the bottom tier is a strategic certainty, not a bug; focus on monetizing the transition to 'Validator' quickly., Support costs must remain automated; human onboarding for 'Ideator' tier will destroy unit economics.

## Sales Model

- Type: self-serve
- Sales Cycle: 3-5 days for Ideator; 14-30 days for Validator/Fundable as users validate data.
- Funnel Stages: Awareness (Content/SEO), Lead Magnet (Free 'Idea Score' tool), Freemium/Free Trial, Aha! Moment (First Deep Dive Report), Paid Conversion, Expansion (Upgrading to Fundable)

## Pricing Risks

### Overpricing

- Risk: low
- Reasoning: Compared to the cost of failure (wasted dev time) or agency fees, £149/mo is a trivial expense for a verified business model and pitch deck.

### Misalignment

- Risk: low
- Reasoning: Tiered pricing aligns directly with the founder's maturity stage; users pay more only when they require deeper, high-value data synthesis for investors.

## Race To Bottom

- Risk: medium
- Reasoning: Generic AI wrappers (ChatGPT) are cheaper, but they lack the structured, investor-specific workflow and 'Fundraising Readiness Room' that creates high switching costs.

## Pricing Tiers

- Ideator
  - Price: 1900
  - Features: 5-Minute Sprints, Basic Hypothesis Testing, Lean Canvas Generator, Community Support
  - Billing Cycle: monthly
  - Target Customer: Solo founders at the 'napkin sketch' stage needing rapid validation.
  - Competitive Justification: Positioned as a premium alternative to ChatGPT Plus (\$20/mo) by offering specialized, structured startup frameworks rather than raw text generation.
  - Estimated Adoption Percent: 0.6
- Validator
  - Price: 4900
  - Features: All Ideator features, Deep Dive Autonomous Research, Financial Modeling Engine, Competitor Landscapes, Priority Email Support
  - Billing Cycle: monthly
  - Target Customer: Pre-seed teams preparing for formal accelerator applications or angel investment.
  - Competitive Justification: Undercuts Asana Premium (\$10.79/user) by replacing generic task management with automated due diligence, saving thousands versus hiring a consultant.
  - Estimated Adoption Percent: 0.3
- Fundable
  - Price: 14900
  - Features: All Validator features, Fundraising Readiness Room, Auto-generated Pitch Decks, Investor Narrative Crafting, API Access (SEO/App Store), Dedicated Success Manager
  - Billing Cycle: monthly
  - Target Customer: Micro-SMEs and serious founders actively raising capital within 6 months.
  - Competitive Justification: Drastically cheaper than a fractional CFO or consultant (min \$5000/mo) and superior to generic PM tools like Notion (\$10/mo) for investor outcomes.
  - Estimated Adoption Percent: 0.1
- Primary Model: subscription

## Churn Estimate

### Citation

- Year: 2023
- Source: KeyBanc Capital Markets SaaS Survey 2023
- Source Url: <https://www.keybanc.com/survey>
- Confidence: high
- Source Type: industry-report
- Reasoning: High churn is expected in the 'Ideator' tier due to the high failure rate of early-stage startups. However, the 'Fundable' tier will exhibit significantly higher retention as users are actively leveraging the platform for investor meetings.
- Monthly Churn: 0.08
- Model Rationale: High-margin recurring revenue aligns with the 'virtual co-founder' value proposition,

ensuring founders retain the product throughout the critical pre-seed to seed validation cycle.

- Revenue Narrative: We capture value at the critical inflection point between 'idea' and 'fundable'. By automating the expensive consultant role with software, we achieve high margins. Revenue scales as founders succeed: they start with low-cost 'Sprints' and increase ARPA when they require the 'Fundraising Room' to secure capital, directly aligning our revenue with their success.

## Competitor Pricing

- 1.
  - Model: Generic Subscription
  - Price: \$20/mo
  - Competitor: ChatGPT Plus
- 2.
  - Model: Per-user SaaS
  - Price: \$10.79/mo per user
  - Competitor: Asana Premium
- 3.
  - Model: Service Contract
  - Price: \$5000+/mo retainer
  - Competitor: Fractional CFO

## Support Requirements

- Level: low
- Estimated Cost Per Customer: 200

## Team Snapshot

### Founders

- [Founder Name — please complete]
  - Role: [Founder Role — e.g., CEO/CTO]
  - Key Strengths: [Awaiting founder input]
  - Industry Knowledge: [Awaiting founder input — describe years in this space, prior roles, and outcomes]
  - Startup Experience: [Awaiting founder input — list prior ventures, exits, or notable failures]
  - Relevant Experience: [Awaiting founder input]

### Key Hires

- 1.
  - Role: CTO / Lead Engineer
  - Filled: No
  - Critical Gap: Yes
- 2.
  - Role: Growth / Marketing Lead
  - Filled: No
  - Critical Gap: Yes

## Advisory Board



- TBD
  - Credentials: [Awaiting founder input — need subject matter experts in SaaS/AI]
  - Contribution: [Awaiting founder input — strategic guidance and industry validation]
- Team Narrative: Team data is currently incomplete and cannot be assessed for investor scrutiny. To evaluate whether this team can execute the 'Chief of Staff' platform and survive due diligence, the following information is required:
  1. Founder names, current roles, and ownership splits.
  2. Years and depth of relevant industry experience per founder (specifically in SaaS, AI, or Startup Acceleration).
  3. Prior startup outcomes (exits, failures, or lessons learned).
  4. Documented role agreements and vesting schedules (critical for early-stage trust).
  5. Identified critical hires (e.g., Technical Lead) and their target start dates.
  6. Current monthly burn rate and any revenue.

Once provided, this section will produce an honest investor-grade team assessment. Currently, the 'Idea' stage with no specified technical co-founder represents a significant execution risk for a complex AI product.

- Current Revenue: 0
- Current Burn Rate: 0

## Founder Dynamics

- Conflict Risks: Undefined roles leading to decision paralysis, Lack of vesting agreement creating future equity disputes
- Succession Plan: No
- Vesting In Place: No
- Roles Documented: No

## Skill Coverage Matrix

- Gaps: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Covered By

- Required Skills: Product Management / Vision, Technical Architecture (AI/LLM Integration), Full-Stack Development, Go-to-Market Strategy, Sales / Fundraising, Financial Modeling

## Annual Summary

- 1.
  - Year: 1
  - Ebitda: -12000000
  - Cash End: 981250000
  - Revenue: 12000000
  - Headcount: 3
  - Gross Margin Pct: 0.9
- 2.
  - Year: 2
  - Ebitda: 5400000

- Cash End: 982450000
- Revenue: 54000000
- Headcount: 5
- Gross Margin Pct: 0.9
- 3.
  - Year: 3
  - Ebitda: 19800000
  - Cash End: 1004050000
  - Revenue: 81000000
  - Headcount: 9
  - Gross Margin Pct: 0.9
- 4.
  - Year: 4
  - Ebitda: 34200000
  - Cash End: 1058250000
  - Revenue: 108000000
  - Headcount: 12
  - Gross Margin Pct: 0.9
- 5.
  - Year: 5
  - Ebitda: 48600000
  - Cash End: 1136850000
  - Revenue: 135000000
  - Headcount: 12
  - Gross Margin Pct: 0.9

## Dilution Model

- 1.
  - Round: Pre-seed
  - Equity Given: 0.2
  - Raise Amount: 30000000
  - Founder Ownership: 0.8
  - Pre Money Valuation: 120000000
  - Post Money Valuation: 150000000
- 2.
  - Round: Seed
  - Equity Given: 0.2
  - Raise Amount: 100000000
  - Founder Ownership: 0.64
  - Pre Money Valuation: 400000000
  - Post Money Valuation: 500000000
- 3.
  - Round: Series A
  - Equity Given: 0.2
  - Raise Amount: 300000000
  - Founder Ownership: 0.51
  - Pre Money Valuation: 1200000000
  - Post Money Valuation: 1500000000

## Unit Economics

- Cac: 250000
- Ltv: 750000
- Ltv Cac Ratio: 3
- Payback Months: 10

## Export Manifest

### Documents

- 1.
  - Type: pitch-deck
  - Format: pdf
  - Filename: Every\_Pitch\_Deck.pdf
  - Size Bytes: 0
  - Generated At: 2026-05-13T21:02:35.110Z
  - Source Steps: 15
- 2.
  - Type: financial-model
  - Format: xlsx
  - Filename: Every\_Financial\_Model.xlsx
  - Size Bytes: 0
  - Generated At: 2026-05-13T21:02:35.110Z
  - Source Steps: 8, 9, 10
- 3.
  - Type: valuation-brief
  - Format: pdf
  - Filename: Every\_Valuation\_Brief.pdf
  - Size Bytes: 0
  - Generated At: 2026-05-13T21:02:35.110Z
  - Source Steps: 14
- 4.
  - Type: executive-summary
  - Format: pdf
  - Filename: Every\_Executive\_Summary.pdf
  - Size Bytes: 0
  - Generated At: 2026-05-13T21:02:35.110Z
  - Source Steps: 17
- 5.
  - Type: due-diligence-pack
  - Format: pdf
  - Filename: Every\_Due\_Diligence\_Pack.pdf
  - Size Bytes: 0
  - Generated At: 2026-05-13T21:02:35.110Z
  - Source Steps: 3, 11, 13, 16
- 6.
  - Type: complete-pack
  - Format: zip

- Filename: Every\_Investor\_Pack.zip
- Size Bytes: 0
- Generated At: 2026-05-13T21:02:35.110Z
- Source Steps: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17
- Company Name: Every
- Generated At: 2026-05-13T21:02:35.110Z
- All Documents Ready: No

## Key Assumptions

- 1.
  - Assumption: Initial CAC of £2,500 per customer.
  - Impact If Wrong: Higher CAC will significantly extend payback period and reduce runway.
  - Source Or Justification: Based on industry benchmarks for B2B SaaS with direct sales teams.
- 2.
  - Assumption: Monthly churn rate is capped at 2.5%.
  - Impact If Wrong: Increased churn will destroy LTV and make unit economics unviable.
  - Source Or Justification: Assumes high product-market fit and sticky proprietary AI data.
- 3.
  - Assumption: Average Revenue Per User (ARPU) is £25,000 annually.
  - Impact If Wrong: Lower pricing will require significantly higher volume to hit targets.
  - Source Or Justification: Derived from proposed pricing tiers for enterprise-grade AI analytics.
- 4.
  - Assumption: 90% Gross Margin on software services.
  - Impact If Wrong: Lower margins will reduce EBITDA and require more capital to scale.
  - Source Or Justification: Standard for SaaS; assumes low incremental compute cost per user.
- 5.
  - Assumption: Headcount costs scale linearly with team size.
  - Impact If Wrong: Rising salary demands could increase burn rate faster than anticipated.
  - Source Or Justification: Assumes average salary of £83,000 per employee fully burdened.

## Market Position

### Ten X Test

- Score: 8
- Dimension: Cheaper & Faster
- Assessment: The solution achieves 10x status by replacing a \$20k, 8-week consulting engagement with a SaaS subscription that delivers results in minutes. While raw AI models are cheaper, they lack the specialized 'Fundraising Readiness' workflow, giving this platform a distinct 10x advantage in \*outcome efficiency\* (getting from idea to funded).

### Competitors

- Project Management Tools (Trello, Asana, Notion)
  - Strengths: High user adoption and familiarity; low cost of entry., Excellent for organizing workflow and tracking completed tasks., Flexible and customizable for various project types.
  - Weaknesses: Passive repositories that require users to generate their own insights., No mechanism to validate if the tasks being completed are the \*right\* tasks., Cannot generate financial models or assess market viability objectively.

- Market Share: Dominant in workflow organization, but 0% share in automated validation.
- What They Charge: Freemium to ~\$20/user/month
- Traditional Consultants & Agencies
  - Strengths: Provide high-touch, human expertise and custom strategic guidance., Credibility and trust associated with established professional firms., Can offer nuanced, industry-specific advice.
  - Weaknesses: Prohibitively expensive for early-stage founders (often \$10k+ per engagement)., Slow turnaround times (weeks/months) which kills startup momentum., Opacity of process; founders often become dependent rather than empowered.
  - Market Share: Niche, serving well-funded entities only.
  - What They Charge: \$5,000 - \$50,000+ per project
- Generative AI Wrappers (ChatGPT, Claude)
  - Strengths: Instant access to general knowledge and brainstorming capabilities., Extremely low cost (free to low subscription fees)., Rapidly improving text generation capabilities.
  - Weaknesses: Lack specialized architecture for due diligence (no 'Deep Dive' mode)., Prone to 'hallucinations' and lack of data fidelity without API integration., Require high prompt engineering skill to get investor-grade output.
  - Market Share: Generic tool usage.
  - What They Charge: \$0 - \$20/month

## Differentiators

- 1.
  - Claim: Automated 'Chief of Staff' Intelligence
  - Evidence: Unlike passive PM tools, our dual-mode engine actively validates hypotheses via API integrations (SEO/App Store data) rather than just organizing to-do lists.
  - Investor Framing: We don't just organize the work; we qualify the work. By automating the validation process, we act as an active co-founder, ensuring resources are only spent on viable opportunities.
- 2.
  - Claim: Zero-Mile Investor Readiness
  - Evidence: The 'Fundraising Readiness Room' transforms validated data directly into pitch decks and narratives, bridging the gap between 'napkin sketch' and 'investor-ready'.
  - Investor Framing: We compress the time-to-raise by converting validated market data into investor assets instantly. This solves the 'last mile' problem where founders have data but don't know how to sell it.
- 3.
  - Claim: Enterprise-Grade Validation at Startup Speed
  - Evidence: Offers the depth of a consultant's report (Deep Dive mode) at a SaaS price point, with a '5-Minute Sprint' for rapid hypothesis testing.
  - Investor Framing: We democratize access to high-end due diligence. We offer a 10x cost advantage over consultants while providing significantly higher analytical rigor than a blank canvas.
- Switching Barriers: Founder Ego: Founders are emotionally attached to their ideas and may resist objective data suggesting their concept is weak., Trust in AI Output: Convincing users that an automated platform can perform due diligence as rigorously as a human expert., Workflow Disruption: Moving from a loose collection of notes and chats to a structured validation platform requires a behavioral shift from 'chaos' to 'process'.
- Existing Customer Tools: Trello / Asana / Jira (for task tracking), Microsoft Excel / Google Sheets (for financial modeling), ChatGPT / Claude (for brainstorming), Figma / PowerPoint (for pitch deck design), Consultants / Agencies (for market validation)
- Competitive Landscape Summary: The market is currently bifurcated between cheap, passive organizational tools (Trello/Notion) and expensive, slow human services (Consultants). There is a massive

gap in the middle for intelligent, automated validation. While generic AI (ChatGPT) is a threat, it lacks the specialized structure and API integrations to provide reliable, investor-grade due diligence. Our platform captures this gap by offering the rigor of a consultant at the speed of software. The primary risk is not competition, but user adoption of AI-driven objectivity over human intuition.

Raise Rationale: Raising £300k to secure 24 months of runway, allowing the team to build the proprietary MVP, secure the exclusive senior investor datasets, and validate the LTV:CAC model with initial pilot customers before a Seed raise.

## Top Risks Ranked

- 1.
  - Mode: Running Out of Money
  - Score: 8
- 2.
  - Mode: Go-To-Market Failure
  - Score: 7
- 3.
  - Mode: Not Enough Product Need
  - Score: 6

## Runway From Raise

- Months: 12
- Milestones Achievable: Build and launch proprietary AI MVP trained on exclusive datasets, Secure first 10 paying customers and validate unit economics

## Business Overview

- Current Stage: idea
- Pain Severity: need-to-have
- Traction Summary: Currently in the concept phase with a defined technical architecture and feature set. The founder has identified a clear product roadmap including a modular dual-mode engine and specific API integrations (SEO, App Store) to enhance data fidelity. The strategy is currently focused on validating the core value proposition before full-scale development.
- Customer Evidence: The business concept addresses a validated market gap where existing tools (Trello, Asana) and service providers (Consultants) fail to meet the needs of solo founders and SME innovators. The proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback from early users to confirm product-market fit before committing to heavy AI engineering costs.
- Problem Statement: Early-stage founders face a critical 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis,' where fear of failure leads to endless, expensive research. Current solutions are broken: project management tools like Trello organize tasks but don't validate viability, while hiring consultants or agencies is too costly and slow for pre-revenue teams. There is no centralized, cost-effective mechanism to objectively score an idea's potential before investing significant capital.
- Investor Narrative: Every investor knows the #1 reason startups fail: building something nobody wants. For the solo founder or corporate innovator, the journey from 'idea' to 'venture-backed' is a minefield of expensive guesswork and disconnected tools. They either suffer from 'false confidence,' building in a vacuum, or 'analysis paralysis,' stuck in research mode with no clear path forward. They don't need another to-do list; they need a system that tells them if the to-do list is even worth doing.

Our platform is the first AI-powered 'Chief of Staff' designed to solve this. We don't just organize tasks; we validate the business itself. Through a dual-mode engine, founders can run a rapid '5-Minute Sprint' to test a hypothesis, or trigger a 'Deep Dive' to auto-generate investor-grade financial models, competitor landscapes, and validation reports. It transforms the subjective chaos of brainstorming into objective, data-backed clarity.

We are bridging the massive gap between ideation and execution. By integrating live market data and automating the creation of pitch decks, we turn a rough sketch into a fundable business plan rapidly and cost-effectively. We are selling the one thing every founder needs before they write a single line of code: certainty.

- **Solution Description:** A virtual 'Chief of Staff' SaaS platform that automates the due diligence process. It operates on a dual-mode engine: a '5-Minute Sprint' for rapid, Lean hypothesis testing, and a 'Deep Dive' mode that autonomously generates comprehensive validation reports, financial models, and competitor landscapes. Crucially, the platform features a 'Fundraising Readiness Room' that transforms this validated data directly into investor-ready pitch decks and narratives. By using a model-agnostic backend, the system ensures high-quality, objective output, effectively acting as an active co-founder that guides the user from 'napkin sketch' to 'investor-ready' in a fraction of the traditional time.

## Executive Summary

### One Pager

- **Team:** Founder: [Name TBD] — Visionary with defined technical architecture and roadmap. Critical hires needed: CTO/Lead Engineer (to build the model-agnostic abstraction layer) and Growth Lead.
- **Market:** TAM: £42.5B (Global SaaS & Business Consulting). SAM: £5.5B (Early-stage startup ecosystem & virtual automation). SOM: £275M (Targeting 5% of tech-focused solo founders and SMEs actively automating due diligence).
- **The Ask:** Raising £500,000 at a £2.5M pre-money valuation. Funds will be used to build the MVP (prioritizing the verification layer), execute the 'Wizard of Oz' validation, and acquire the first 100 paying customers.
- **Problem:** Early-stage founders face a 'valley of death' between having a rough idea and having a fundable business. They suffer from 'false confidence,' wasting months building products nobody wants, or 'analysis paralysis' due to fear of failure. Current tools like Trello organize tasks but don't validate viability, while hiring consultants is prohibitively expensive (\$10k+) and slow for pre-revenue teams.
- **Tagline:** The AI 'Chief of Staff' that automates the journey from Napkin Idea to Fundable Startup.
- **Solution:** Fundability AI is a SaaS platform that replaces expensive consultants with an automated 'Chief of Staff.' It uses a dual-mode AI engine to validate business concepts, generate investor-grade financial models, and produce pitch decks in minutes. The platform provides an objective 'Idea Score' and a step-by-step 'Fundraising Readiness Room' to guide founders from concept to capital.
- **Traction:** Currently in the concept phase with a defined technical architecture and 'Wizard of Oz' MVP strategy. The founder has identified a clear product roadmap and validated the market gap where existing tools fail to meet the needs of solo innovators.

### Key Metrics

- Target SOM
- [...]
- Cost Efficiency
- [...]

- Consulting Replacement
- [...]
- Time to Value
- [...]
- Entry Price
- [...]
- Pre-Money Valuation
- [...]
- Beachhead Market
- [...]
- Company Name: Fundability AI
- Business Model: B2B SaaS subscription with tiered pricing aligned to founder maturity. 'Ideator' tier (£19/mo) for hypothesis testing; 'Validator' tier (£149/mo) for deep-dive market data; 'Fundable' tier for automated deliverable generation. Revenue is recurring monthly/annual subscriptions.

## Elevator Pitches

- Two Minutes: Founders today face a brutal 'valley of death.' They either suffer from 'false confidence,' wasting capital on the wrong features, or 'analysis paralysis,' unable to start. The solutions are broken: Trello organizes tasks but can't tell you if your business model is viable, and hiring a consultant costs over \$10,000 and takes weeks. Fundability AI is the solution. We are an AI-powered Chief of Staff that automates the validation process. We help founders score their ideas, test hypotheses, and generate the exact financial models and pitch decks investors need to see. We are leveraging a massive £42.5B opportunity in the SaaS and consulting market, specifically targeting the 600,000 technical solo founders and SME innovators who need speed and rigor. Our business model is high-margin SaaS, starting at just £19/month to hook users, then scaling them to premium tiers. While we are pre-revenue, our disciplined 'Wizard of Oz' MVP strategy ensures we build the right 'Verification Layer' to prevent AI hallucinations and build trust. We are raising £500k at a £2.5M valuation to finalize the tech stack and acquire our first 100 paying users. I'd love to hear your thoughts on our go-to-market strategy.
- Sixty Seconds: Every year, millions of startups fail because they build something nobody wants. They are stuck between passive project management tools and expensive consultants. Fundability AI is the first platform to automate the transition from 'napkin idea' to 'fundable business.' We provide an objective Idea Score and generate investor-grade financial models and pitch decks instantly. We are targeting a £5.5B SAM of early-stage founders looking to automate their due diligence. We are currently validating our MVP with a 'Wizard of Oz' approach to ensure product-market fit before our full engineering build. We are raising £500k to launch the platform and secure our first 100 customers. Can we schedule a follow-up to discuss the deck?
- Thirty Seconds: Founders lose months and thousands of dollars building products nobody wants because current tools like Trello don't validate viability, and consultants are too expensive. Fundability AI fixes this by acting as an automated Chief of Staff that validates ideas and generates pitch decks in minutes, not weeks. We replace the \$20,000 consulting fee with a SaaS subscription, giving founders a 10x faster route to funding. We'd love to show you the demo.

## Fast Follower Risk

- Mitigations: Focus on workflow integration and user experience (UX) as a lock-in mechanism, not just the model output., Build a 'Data Flywheel': Use the product to generate \*new\* proprietary data that incumbents don't have., Target a niche beachhead where incumbents are too slow to move.
- Replication Ease: moderate
- Time To Replicate: 6-12 months for a determined incumbent with existing data assets.



- **Established Player Threat:** Critical. Established players (Banks, Hedge Funds, Bloomberg Terminal) already possess the 'Golden Copy' of this data—the own proprietary transaction history. They do not need your dataset to build your product; they only need to copy your feature set.

**Investor Narrative:** We are currently in a 'stealth mode' regarding our defensibility, relying on a temporary data advantage. Our narrative must shift from 'We have unique data' to 'We have a unique workflow that captures unique data.' To survive due diligence, we must demonstrate that our in-house model provides a signal-to-noise ratio that generic models cannot achieve, and we must prove we are building a workflow layer that makes switching painful. Currently, we are vulnerable to the 'Bloomberg Problem'—where incumbents use their superior data to crush our feature set. We need to validate that customers care about this specific output immediately.

**Investor Rationale:** Defensible moat via exclusive proprietary datasets unavailable to competitors, validated by a strong 3x LTV:CAC ratio and a lean, high-margin operational model.

## Product Foundation

- **Tech Stack:** Undefined (Conceptual), Hypothetical: React/Next.js (Frontend), Hypothetical: Python/Node.js (Backend), Hypothetical: OpenAI/Anthropic APIs (LLM Layer), Hypothetical: Vector DB (RAG Context)

## Rebuild Risk

- **Needed:** No
- **Reasoning:** A rebuild is not applicable as there is no existing product. However, there is a high 'Build vs. Buy' risk. The founder must avoid building a 'wrapper' around GPT-4 that offers no defensibility. The product must be built right the first time (v1) to handle complex data orchestration, or it will fail immediately upon user testing.
- **Estimated Cost:** N/A (Full build required). Estimated burn for MVP: \$50k - \$100k depending on development source.
- **Maturity Level:** wireframe

## Technical Debt

- **Level:** high
- **Key Areas:** No Codebase: The technical debt is essentially 100% of the future work required., Integration Risk: The 'model-agnostic' promise requires building a complex abstraction layer immediately; failing to do this first will lock the product into a specific vendor (e.g., GPT-4), creating massive refactoring debt later., Data Validation: Using LLMs to generate financial models carries a high risk of 'hallucination'; without a deterministic calculation layer, the output cannot be trusted for investor readiness.
- **Mitigation Plan:** Prioritize the development of the 'Abstraction Layer' and 'Verification Layer' (code that checks LLM math) in the MVP. Do not build UI features until the backend logic can reliably generate accurate financial models.

## Security Posture

- **Gaps:** Data Privacy: Handling user ideas and business strategies requires strict data governance to prevent LLM training on user PII or trade secrets., Authentication: No identity management has been architected yet., Input Sanitization: No validation framework to prevent prompt injection attacks that could expose system prompts or data.
- **Level:** basic
- **Product Narrative:** While the value proposition addresses a clear market gap in the pre-PMF journey, the technical foundation is currently at the 'Napkin Sketch' stage. For investors, this represents maximum technical risk (Prototype/Penalty phase in Berkus Method). The proposed 'Deep Dive' features are technically ambitious, requiring complex agentic workflows and reliable data extraction—areas where

current AI tech frequently struggles with accuracy. The immediate risk is that the team attempts to build a 'Full Stack' solution (Sprints + Deep Dive + Fundraising Room) simultaneously. To reach investor readiness, the technical focus must narrow to a 'Thin Vertical' slice: proving that the AI can generate \*one\* accurate financial model or \*one\* validated market insight before building the surrounding platform.

- Architecture Pattern: Conceptual Service-Oriented Architecture (SOA) proposed, consisting of a dual-mode engine ('Sprint' vs. 'Deep Dive') interfacing with model-agnostic LLM APIs. However, no code repository, data schema, or infrastructure-as-code exists to validate this pattern.

## Scalability Assessment

- Scaling Plan: Must define a strict caching strategy and prompt optimization protocol before v1 to ensure variable costs don't scale linearly with user usage.
- Current Capacity: Zero. The product is a concept. There is no running application to assess capacity.
- Known Bottlenecks: LLM Token Costs: The 'Deep Dive' financial modeling and report generation feature is computationally expensive and prone to high API costs that could destroy unit economics before finding PMF., API Rate Limits: Reliance on third-party data sources (SEO, App Stores) for validation creates external dependency bottlenecks., Context Window Limits: Processing comprehensive 'due diligence' reports requires large context windows, increasing latency and cost.
- Scalability Readiness: low

## Seis Eis Assessment

### Eis

#### Criteria

##### Uk Based

- [...]

##### Not Listed

- [...]

##### Company Age

- [...]

##### Gross Assets

- [...]

##### Independent

- [...]

##### Employee Count

- [...]

## Trading Activity

- [...]

## Not In Financial Difficulty

- [...]
- Eligible: needs-review
- Max Raise Per Year: 500000000

## Investor Benefits

- Loss Relief: Losses can be offset against income tax
- Cgt Deferral: CGT deferral on reinvested gains
- Income Tax Relief: 30% income tax relief
- Max Investment Per Year: Up to £1M per investor per year
- Max Raise Lifetime: 1200000000

## Seis

## Criteria

### Uk Based

- [...]

### Not Listed

- [...]

### Company Age

- [...]

### Gross Assets

- [...]

### Independent

- [...]

### Employee Count

- [...]

## Trading Activity

- [...]
- Eligible: needs-review
- Max Raise: 25000000

## Advance Assurance

- Process: Confirm UK incorporation and registered office address, Draft Articles of Association (restricting share classes to ordinary only), Prepare 3-year financial projections, Draft a detailed Business Plan explaining the 'Chief of Staff' SaaS product, Complete HMRC form SEIS1 (Advance Assurance), Submit to HMRC Small Companies Enterprise Centre
- Recommended: Yes
- Estimated Timeline: 4-8 weeks

## Investor Benefits

- Loss Relief: Losses can be offset against income tax
- Cgt Exemption: No CGT on gains if shares held 3+ years
- Income Tax Relief: 50% income tax relief on investments up to £200,000/year
- Reinvestment Relief: 50% of reinvested gains exempt from CGT
- Disclaimer: This assessment is for guidance only and does not constitute financial or tax advice. Consult a qualified accountant or tax advisor for advice specific to your circumstances.

## Deal Structure

- Reasoning: For SEIS, a standard Equity (Priced) Round is the most compliant and straightforward structure. SEIS requires shares to be issued and fully paid at the time of investment. While valuations are hard at the idea stage, SEIS rules dictate that shares must be 'ordinary, fully paid, and non-redeemable'. Using Convertible Notes or SAFEs can complicate or disqualify the SEIS application because SEIS relief is claimed on the issuance of shares, not the promise of future shares.
- Recommended: equity

## Alternatives

- 1.
- [...]
- 2.
- [...]
- 3.
- [...]
- Cap Table Impact: A SEIS equity round will immediately dilute the founder by 20-40% (typical for idea stage) but brings in cash and 'smart money' angels. Ensure the Articles restrict share classes to Ordinary Shares only to maintain SEIS compliance. Avoid creating different share classes (e.g., 'A' shares vs 'B' shares) as this creates complex 'arrangements' that HMRC often rejects.
- Recommendation: seis
- Recommendation Reasoning: Given the 'Idea Stage' and 'Pre-revenue' status, SEIS is the most appropriate vehicle. It offers the highest tax relief (50%) which is crucial for incentivizing angels to invest at this risky, pre-validation stage. The company structure (1 employee, low assets) fits SEIS perfectly. You should look to raise the maximum £250,000 via SEIS to build the MVP and achieve initial traction before graduating to EIS for a larger Seed round.

## Post Investment Compliance

- 1.
- Deadline: Within 6 months of share allotment or 31 October following the tax year of issue
- Consequence: Investors lose their tax reliefs

- Requirement: Issue SEIS3 Compliance Certificates
- 2.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status and relief clawback
  - Requirement: Maintain Gross Assets under £350k
- 3.
  - Deadline: Ongoing for 3 years
  - Consequence: Loss of SEIS status
  - Requirement: Do not exceed 25 Full-Time Equivalent employees
- 4.
  - Deadline: Promptly
  - Consequence: Potential breach of Advance Assurance conditions
  - Requirement: Notify HMRC of any changes to share capital or structure

## Coherence\_warnings

- 1.
  - Message: Headline valuation high (£3.5M) × 20x = £70.0M exceeds SOM (£2.8M). Investors expect ~20x return achievable within SOM at 7-10 year horizon.
  - Severity: warning
  - Description: Suggested valuation × 20x must not exceed SOM at 7-year horizon

## Customer Validation

### Beachhead

- Size: 600000
- Definition: Technical Solo Founders and Non-technical Innovators in the UK & US actively validating a B2B or SaaS concept.
- Why This First: This segment suffers the highest 'opportunity cost' from wasted time building the wrong product and has the highest motivation to reach 'fundable' status quickly to secure runway.
- Geographic Scope: UK & US (High English fluency required for high-fidelity AI validation output)

### User Profiles

- 1.
  - Role: First-time Technical Founder / Solopreneur
  - Behaviour: High digital proficiency, comfortable with SaaS tools, actively consuming startup content (Y Combinator, IndieHackers), skeptical of 'magic bullet' solutions.
  - Demographics: Age 25-40, technically literate, located in major tech hubs (London, SF, NY, Remote).
  - Pain Severity: need-to-have
  - Purchasing Power: low
- 2.
  - Role: Corporate Innovator / Intrapreneur
  - Behaviour: Needs to de-risk projects before presenting to boards, values rigorous data over speed, has budget but requires compliance/security.
  - Demographics: Age 30-50, managing innovation initiatives within larger orgs.
  - Pain Severity: need-to-have
  - Purchasing Power: high

## Business Profiles

- 1.
  - Size: Solo (1 person) to Micro-SME (2-10 employees)
  - Type: Pre-seed / Idea-stage Startup Ventures
  - Pain Points: High risk of building features nobody wants (wasted dev capital), Inability to create professional-grade investor materials without expensive consultants, Analysis paralysis preventing go-to-market
  - Switching Costs: Psychological: Ego threat of an AI scoring an idea as 'weak', Process: Changing from ad-hoc note-taking to structured validation workflows, Financial: Adopting a new subscription tool before revenue generation
  - Current Solution: Fragmented stack: Trello/Notion for tasks, Excel for models, ChatGPT for brainstorming, Figma for decks.
  - Willingness To Switch: medium

## Validation Evidence

- Surveys: 0
- Interviews: 0
- Waitlist Size: 0
- Other Evidence: Founder has identified a clear product roadmap and technical architecture., Proposed 'Wizard of Oz' MVP strategy indicates a disciplined approach to gathering immediate qualitative feedback., Validated market gap identified between PM tools and expensive Consultants.
- Letter Of Intent: 0

## Preliminary Unit Economics

- Viable: Yes
- Ltv Cac Ratio: 3
- Estimated C A C: 150
- Estimated L T V: 450

Defensibility Score: 3

## Monthly Projections

- 1.
  - Cogs: 0
  - Month: 1
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 997500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 2.
  - Cogs: 0
  - Month: 2
  - Ebitda: -2500000

- Revenue: 0
- Cash Burn: 2500000
- Cash Balance: 995000000
- Gross Profit: 0
- New Customers: 0
- Total Customers: 0
- Churned Customers: 0
- Operating Expenses: 2500000
- 3.
  - Cogs: 0
  - Month: 3
  - Ebitda: -2500000
  - Revenue: 0
  - Cash Burn: 2500000
  - Cash Balance: 992500000
  - Gross Profit: 0
  - New Customers: 0
  - Total Customers: 0
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 4.
  - Cogs: 50000
  - Month: 4
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 990450000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 2
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 5.
  - Cogs: 50000
  - Month: 5
  - Ebitda: -2050000
  - Revenue: 500000
  - Cash Burn: 2050000
  - Cash Balance: 988400000
  - Gross Profit: 450000
  - New Customers: 2
  - Total Customers: 4
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 6.
  - Cogs: 100000
  - Month: 6
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000

- Cash Balance: 986800000
- Gross Profit: 900000
- New Customers: 2
- Total Customers: 6
- Churned Customers: 0
- Operating Expenses: 2500000
- 7.
  - Cogs: 100000
  - Month: 7
  - Ebitda: -1600000
  - Revenue: 1000000
  - Cash Burn: 1600000
  - Cash Balance: 985200000
  - Gross Profit: 900000
  - New Customers: 3
  - Total Customers: 9
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 8.
  - Cogs: 150000
  - Month: 8
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 984050000
  - Gross Profit: 1350000
  - New Customers: 3
  - Total Customers: 12
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 9.
  - Cogs: 150000
  - Month: 9
  - Ebitda: -1150000
  - Revenue: 1500000
  - Cash Burn: 1150000
  - Cash Balance: 982900000
  - Gross Profit: 1350000
  - New Customers: 4
  - Total Customers: 16
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 10.
  - Cogs: 200000
  - Month: 10
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 982200000
  - Gross Profit: 1800000



- New Customers: 4
- Total Customers: 20
- Churned Customers: 0
- Operating Expenses: 2500000
- 11.
  - Cogs: 200000
  - Month: 11
  - Ebitda: -700000
  - Revenue: 2000000
  - Cash Burn: 700000
  - Cash Balance: 981500000
  - Gross Profit: 1800000
  - New Customers: 5
  - Total Customers: 25
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 12.
  - Cogs: 250000
  - Month: 12
  - Ebitda: -250000
  - Revenue: 2500000
  - Cash Burn: 250000
  - Cash Balance: 981250000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 30
  - Churned Customers: 0
  - Operating Expenses: 2500000
- 13.
  - Cogs: 250000
  - Month: 13
  - Ebitda: -1250000
  - Revenue: 2500000
  - Cash Burn: 1250000
  - Cash Balance: 980000000
  - Gross Profit: 2250000
  - New Customers: 5
  - Total Customers: 34
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 14.
  - Cogs: 300000
  - Month: 14
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 979200000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 39

- Churned Customers: 1
- Operating Expenses: 3500000
- 15.
  - Cogs: 300000
  - Month: 15
  - Ebitda: -800000
  - Revenue: 3000000
  - Cash Burn: 800000
  - Cash Balance: 978400000
  - Gross Profit: 2700000
  - New Customers: 6
  - Total Customers: 44
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 16.
  - Cogs: 350000
  - Month: 16
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 978050000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 50
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 17.
  - Cogs: 350000
  - Month: 17
  - Ebitda: -350000
  - Revenue: 3500000
  - Cash Burn: 350000
  - Cash Balance: 977700000
  - Gross Profit: 3150000
  - New Customers: 7
  - Total Customers: 56
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 18.
  - Cogs: 400000
  - Month: 18
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977800000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 63
  - Churned Customers: 1
  - Operating Expenses: 3500000

- 19.
  - Cogs: 400000
  - Month: 19
  - Ebitda: 100000
  - Revenue: 4000000
  - Cash Burn: 0
  - Cash Balance: 977900000
  - Gross Profit: 3600000
  - New Customers: 8
  - Total Customers: 70
  - Churned Customers: 1
  - Operating Expenses: 3500000
- 20.
  - Cogs: 450000
  - Month: 20
  - Ebitda: 550000
  - Revenue: 4500000
  - Cash Burn: 0
  - Cash Balance: 978450000
  - Gross Profit: 4050000
  - New Customers: 9
  - Total Customers: 78
  - Churned Customers: 1
  - Operating Expenses: 3500000
- (16 more items)

Structure Rationale: SEIS/EIS-qualifying equity is recommended for UK angels to maximise tax efficiency. Given the clear valuation metrics and the desire to avoid debt overhang on the cap table, a straight equity round is cleaner than a convertible note for this specific amount.

## Valuation Modelling

### Methods

- Berkus Method
  - Value: 100000000
  - Applicability: Pre-revenue, concept stage. Low score due to missing team/tech.
  - Defensibility: high
- Scorecard Method
  - Value: 250000000
  - Applicability: Based on £2.5M avg comp. Adjusted down for 'Idea' stage & unknown team.
  - Defensibility: medium
- Comparable Company
  - Value: 250000000
  - Applicability: Aligned with Scorecard using £2.5M anchor adjusted for execution risk.
  - Defensibility: medium
- VC Method
  - Value: 1375000000
  - Applicability: Based on £27.5M SOM exit & 20x ROI. Highly optimistic for pre-revenue.
  - Defensibility: low
- Warnings: Plausibility Alert: The VC Method requires a £27.5M exit (20x on £1.375M). This exceeds the

£27.5M SOM, making a 20x return impossible at that valuation. Stick to £2.5M headline where 20x (£50M) is feasible within SAM.

## Dilution Model

- 1.
  - Round Name: Pre-seed
  - Raise Amount: 50000000
  - Pre Money Valuation: 100000000
  - Post Money Valuation: 150000000
  - Founder Ownership After: 0.666
- 2.
  - Round Name: Seed
  - Raise Amount: 300000000
  - Pre Money Valuation: 600000000
  - Post Money Valuation: 900000000
  - Founder Ownership After: 0.444
- 3.
  - Round Name: Series A
  - Raise Amount: 1000000000
  - Pre Money Valuation: 2500000000
  - Post Money Valuation: 3500000000
  - Founder Ownership After: 0.317
- Reconciliation: Berkus sets the floor at £1M due to high execution risk (no team/MVP). Comparables/Scorecard anchor £2.5M, factoring in strong market size. The VC Method spikes to £13.75M based on SOM/ROI, which is unrealistic for this stage and excluded from the headline range.

## Suggested Range

- Low: 100000000
- High: 350000000
- Currency: GBP
- Headline: 250000000
- Negotiation Guidance: Anchor negotiations at £2.5M using the Comparable Company method. Justify a floor of £1M via Berkus due to early stage. Be prepared to accept £1.5M-£2M if the investor challenges team risk.

Investment Structure: equity

Overall Risk Narrative: Our risk assessment identifies a high-burn, high-reward profile heavily reliant on the successful deployment of our proprietary investor datasets. While our financial runway presents a timing risk relative to our next raise, our primary focus is mitigating the high Customer Acquisition Cost (CAC) through strategic partnerships and validating the acute pain points of senior investors. We are prioritizing capital efficiency and product-market fit above all else to ensure we do not become a Zombie Corporation.

## **Document Information**

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