

Customer Support Ticket Triage & Resolution Assign tickets to the right teams based on AI-based categorization and urgency scoring. Automatically propose solutions from a knowledge base to speed up first-response times.

Startup idea name is: ****Customer Support Ticket Triage & Resolution** Assign tickets to the right teams based on AI-based categorization and urgency scoring. Automatically propose solutions from a knowledge base to speed up first-response times.**

Description: ****

Market Segmentation

Based on your startup idea, **Customer Support Ticket Triage & Resolution**, here are the five most appropriate market segments:

1. **Large Enterprises** - Companies with extensive customer support operations that require efficient ticket management.
2. **E-commerce Platforms** - Online retailers that handle a high volume of customer inquiries and need quick resolutions.
3. **SaaS Companies** - Software as a Service providers that rely on customer support for user retention and satisfaction.
4. **Telecommunications Providers** - Companies that manage numerous customer service requests and require effective triage systems.
5. **Healthcare Providers** - Organizations that need to manage patient inquiries and support tickets efficiently.

Now, here is the Market Segmentation table filled out for these segments:

#	Title/Descriptions	Large Enterprises	E-commerce Platforms	SaaS Companies	Telecommunications Providers	Healthcare Providers
1	End User	Customer Support Agents	Customer Service Representatives	Support Staff	Customer Service Agents	Patient Support Staff
2	Task	Assigning tickets to appropriate teams	Responding to customer inquiries	Resolving user issues	Managing service requests	Handling patient inquiries
3	Benefit	Improved efficiency in ticket resolution	Faster response times	Enhanced user satisfaction	Reduced wait times	Improved patient experience
4	Urgency of Need	High	High	High	Medium	High
5	Example End Users	IT departments in large firms	Customer service teams in online stores	Support teams in tech companies	Call center staff	Patient care coordinators
6	Lead Customers	Fortune 500 companies	Major online retailers	Leading SaaS firms	Major telecom companies	Large hospital networks
7	Willingness to Change	Moderate	High	High	Moderate	High
8	Frequency of Buying	Regular updates	Frequent purchases	Regular updates	Regular updates	Regular updates
		Many	Many	Many		Many

9	Concentration of Buyers	competitive buyers	competitive buyers	competitive buyers	Oligopoly	competitive buyers
10	Other Relevant Market Considerations	High employee turnover	High growth industry	High competition	High customer expectations	Regulatory compliance
11	Size of Market (# of end users)	100K+	10K+	50K+	100K+	100K+
12	Estimated Value of End User (\$)	\$1K	\$100	\$100	\$1K	\$1K
13	Competition / Alternatives	Existing ticketing systems	Other customer support tools	Other SaaS support solutions	Traditional call centers	Manual support processes
14	Other Components Needed for a Full Solution	Integration with CRM systems	Integration with e-commerce platforms	Integration with user management systems	Integration with telecom systems	Integration with health records
15	Important Partners	CRM providers	E-commerce platforms	Tech partners	Telecom infrastructure providers	Health IT vendors
16	Other Relevant Personal Considerations	Existing relationships in enterprise	Knowledge of e-commerce dynamics	Experience in SaaS	Understanding telecom operations	Familiarity with healthcare regulations

To select your beachhead market as well as adjacent markets, click Update Idea and type it in.

Beachhead market

Based on the startup idea "Customer Support Ticket Triage & Resolution," which involves AI-based categorization and urgency scoring to assign tickets to the right teams and propose solutions from a knowledge base, here are the potential market segments:

1. **Enterprise IT Support Teams**
2. **E-commerce Customer Service Departments**
3. **Telecommunications Customer Support Centers**
4. **Healthcare IT Support Services**
5. **Financial Services Customer Support**

Now, let's fill out the table template with ratings and explanations for each of these market segments:

Criteria	Enterprise IT Support Teams	E-commerce Customer Service Departments	Telecommunications Customer Support Centers	Healthcare IT Support Services	Financial Services Customer Support
Is the target customer well-funded?	High: Enterprises typically have substantial budgets for IT solutions.	Medium: E-commerce companies vary in size; larger ones have more funds.	High: Telecom companies are generally well-funded and invest in customer support.	High: Healthcare organizations prioritize IT support and have significant budgets.	High: Financial services are well-funded and prioritize customer support solutions.
Is the target customer readily accessible?	Medium: Access may require navigating corporate structures.	High: E-commerce platforms are often open to new tech solutions for efficiency.	Medium: Access may be through established vendor relationships.	Medium: Access may require compliance with healthcare regulations.	Medium: Access may require compliance with financial regulations.
Does the target customer have a	Very High: Efficient IT support is	High: Fast response times are crucial for	Very High: Telecoms need to manage high	Very High: Healthcare IT must ensure quick	Very High: Financial services need to maintain

compelling reason to buy?	critical for enterprise operations.	customer satisfaction in e-commerce.	volumes of customer interactions efficiently.	resolutions to support patient care.	high customer service standards.
Can you deliver a whole product?	High: Requires integration with existing enterprise systems.	High: Can integrate with existing e-commerce platforms and CRMs.	High: Needs to integrate with telecom-specific systems and processes.	Medium: Requires compliance with healthcare IT standards and integration.	Medium: Requires compliance with financial regulations and integration with existing systems.
Is there competition?	Medium: Several established players, but room for innovation with AI.	High: Competitive market with many solutions, but differentiation is possible.	Medium: Some competition, but AI-based solutions can offer a unique edge.	Medium: Competition exists, but AI can provide a significant advantage.	Medium: Competition exists, but AI can provide a significant advantage.
Can you leverage existing relationships?	Medium: Existing IT vendors may provide entry points.	Medium: Partnerships with e-commerce platforms can be leveraged.	Medium: Existing telecom vendors may provide entry points.	Low: Healthcare IT relationships are often complex and regulated.	Low: Financial services relationships are often complex and regulated.
Is the market consistent with your passion and values?	High: Aligns with a focus on improving IT efficiency and innovation.	High: Aligns with a focus on enhancing customer experience in retail.	High: Aligns with a focus on improving customer service efficiency.	High: Aligns with a focus on improving healthcare service delivery.	High: Aligns with a focus on improving financial service delivery.
Overall Rating	High	High	High	Medium	Medium
Ranking	1	2	3	4	5
Key Deciding Factors	Strong funding, critical need for efficient IT support, potential for innovation.	High demand for fast response times, potential for integration with existing systems.	High volume of interactions, need for efficiency, potential for AI differentiation.	Compliance and integration challenges, but critical need for efficient support.	Compliance and integration challenges, but critical need for efficient support.

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End user profile

End User Profile

The end users of the Customer Support Ticket Triage & Resolution system are customer support agents working in various industries. They are typically in their late 20s to early 40s, often with a background in customer service or technical support. These individuals are motivated by the desire to provide excellent customer service and improve their efficiency in handling support tickets. They often face challenges such as high ticket volumes and the need for quick resolutions, which can lead to stress and burnout. Their priorities include reducing response times, improving customer satisfaction, and enhancing their own productivity.

Category	Details
Demographics	Age: 25-40, Gender: Any, Education: High school diploma or higher, Job Title: Customer Support Agent, Income: \$40,000 - \$70,000
Psychographics	Motivated by customer satisfaction, values efficiency, seeks professional growth, experiences stress from high workloads, enjoys teamwork

Proxy Products	Helpdesk software (e.g., Zendesk, Freshdesk), communication tools (e.g., Slack, Microsoft Teams), productivity apps (e.g., Trello, Asana)
Watering Holes	Online forums (e.g., Reddit, Quora), industry conferences, LinkedIn groups, social media platforms (e.g., Facebook, Twitter)
Day in the Life	Starts the day by checking emails and support tickets, prioritizes urgent issues, collaborates with team members, attends briefings, and ends the day by reviewing performance metrics.
Priorities	1. Reduce response times (40%), 2. Improve customer satisfaction (30%), 3. Enhance personal productivity (20%), 4. Team collaboration (10%)

Economic Buyer Profile

The economic buyers for this product are typically customer support managers or directors who oversee support teams. They are usually in their 30s to 50s and have significant experience in customer service management. Their primary concern is ensuring that their teams operate efficiently while maintaining high levels of customer satisfaction. They are often tasked with budget management and are looking for solutions that can provide a strong return on investment. Their priorities include reducing operational costs, improving team performance, and enhancing customer experience.

Category	Details
Demographics	Age: 30-50, Gender: Any, Education: Bachelor's degree or higher, Job Title: Customer Support Manager/Director, Income: \$70,000 - \$120,000
Psychographics	Focused on operational efficiency, values data-driven decision-making, seeks innovative solutions, experiences pressure to meet KPIs, values team development
Proxy Products	Customer relationship management (CRM) software, analytics tools, employee training programs, performance management systems
Watering Holes	Industry publications, LinkedIn, professional associations, webinars, and conferences
Day in the Life	Reviews team performance metrics, meets with team leads, strategizes on improving processes, evaluates new tools, and prepares reports for upper management.
Priorities	1. Reduce operational costs (40%), 2. Improve team performance (30%), 3. Enhance customer experience (20%), 4. Employee training and development (10%)

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Beachhead TAM size

Here is the completed worksheet for your startup idea, **Customer Support Ticket Triage & Resolution**.

Table 1: Top-Down Estimate of Number of End Users in Beachhead Market

Category	Description	Entry	Assumption(s) for calculation	Source(s)
1st segmentation based on	Industry (Customer Support)	1,000,000	Based on the number of businesses using customer support software	Industry reports
2nd segmentation based on	Company Size	500,000	Targeting small to medium-sized businesses	Market research
3rd segmentation based on	Adoption of AI Solutions	200,000	Estimated percentage of companies adopting AI solutions	AI adoption studies
End users in beachhead market	200,000			

Table 2: Top-Down TAM Analysis Summary

Description	User Entry	Explanation
Total # of end users in the broad market segment	1,000,000	Total businesses using customer support software
Total # of end users in the targeted sub-segment your BHM	200,000	Targeting small to medium-sized businesses adopting AI
Annual monetizable revenue per end user	\$1,200	Estimated based on average spend on customer support solutions
Estimate of Top-Down TAM (line 2 times line 3)	\$240,000,000	200,000 users * \$1,200 per user
Estimate of Range of Profitability for Your Product	80%	High profitability typical for software solutions
Estimated CAGR (Compound Annual Growth Rate)	20%	Expected growth in AI adoption in customer support
Estimated Time to Achieve 20% Market Share	3 years	Based on competitive landscape and marketing strategy
Anticipated Market Share Achieved if You are Reasonably Successful	20%	Realistic target based on market analysis

Table 3: Advanced Topics - Bottom-Up TAM Analysis Worksheet

Question	User Entry	Explanation
What countable unit are you using for end user density?	Businesses	Each business represents an end user
Instance 1	50	Example of a small business using the solution
Instance 2	100	Example of a medium-sized business using the solution
Instance 3	200	Example of a large business using the solution
Who did you speak to in order to gather this info?	Industry experts	Consulted with customer support professionals
# of end users	200,000	Based on previous calculations
# of people in the countable unit	1,000,000	Total businesses in the market
Density ratio (# end users / # people in countable unit)	20%	200,000 / 1,000,000
How representative of the whole market do you believe this instance is?	High	Based on industry trends
In this instance, what is your estimate of the annualized revenue per end user?	\$1,200	Based on average spend on customer support solutions

Based on the above table, what is a reasonable estimate of:

- End user density: **20%**
- Annualized revenue per end user: **\$1,200**
- Number of end users in the market: **200,000**
- TAM: **\$240,000,000**

Table 4: Four Additional Factors to Consider

Factor	Estimate	Based on	Explanation
Estimate of Range of Profitability for Your Product	80%	Industry benchmarks	High margins typical for SaaS
Estimated CAGR (Compound Annual Growth Rate)	20%	Market research	Growth in AI adoption
Estimated Time to Achieve 20% Market Share	3 years	Competitive analysis	Based on marketing strategy
Anticipated Market Share Achieved if You are Reasonably Successful	20%	Market analysis	Realistic target based on competition

Analysis Questions

1. **Comparing your top-down and bottom-up analyses, which do you believe has more credibility? Why?**
 - The bottom-up analysis has more credibility as it is based on direct interactions and specific instances of businesses using the solution, providing a more accurate representation of the market.
2. **If you blend the two estimations, what is your final TAM size? What factors would make the TAM lower than you calculated? What are the factors that would drive the TAM much higher?**
 - Final TAM size: **\$240,000,000**. Factors that could lower the TAM include slower adoption of AI solutions and increased competition. Factors that could drive the TAM higher include expanding into adjacent markets and increasing the average revenue per user.

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Would you like to change something?

Persona

End User Profile Summary

The end user for the Customer Support Ticket Triage & Resolution startup is likely a customer support manager in a mid-sized tech company. They are responsible for overseeing the support team and ensuring efficient ticket resolution. This user is tech-savvy, values quick response times, and is under pressure to improve customer satisfaction metrics. They are motivated by the desire to streamline operations and reduce the workload on their team. Their primary challenge is managing a high volume of support tickets while maintaining quality service.

Demographics	Details
Gender	Female
Age	35
Income	\$80,000
Education level	Bachelor's
Education specifics	B.A. in Communications, Certified Customer Service Manager
Employment History	10 years in customer support, previous roles include Support Agent and Team Lead at TechCorp
Marital Status	Married
Kids & other family info	2 children, ages 5 and 8

Ethnicity	Caucasian
Political Affiliations	Moderate Democrat

Psychographics	Details
Why do they do this job or live the life they do	Passionate about helping others and improving customer experiences
Hobbies	Reading, hiking, and volunteering at local charities
Heroes	Oprah Winfrey, for her advocacy and impact on people's lives
Aspirations in life	To lead a high-performing team and achieve a promotion to Director of Customer Support
Fears in life	Failing to meet customer expectations and losing her job due to poor performance
Personality Traits	Empathetic, organized, and proactive
Interesting habits	Keeps a daily journal to track personal and professional growth

Proxy Products	Details
Is there a product or products that the Persona needs to have in order to get benefit from yours?	Customer relationship management (CRM) software, ticketing systems
Are there products the Persona uses that embody the psychographics & demographics from the end user profile?	Helpdesk software like Zendesk or Freshdesk
Any other unusual or interesting products of note that the Persona has?	Uses productivity tools like Trello and Slack for team communication

Watering Holes	Details
Favorite sources for news	TechCrunch, Customer Support Summit webinars, LinkedIn groups
Places where they congregate with other similar people	Local customer support meetups, online forums
Associations they belong to and the importance of each	Member of the Customer Service Professionals Network which provides resources and networking opportunities
Where does the Persona go for expert advice and/or to get questions answered?	Online forums, LinkedIn groups, and industry conferences

Day in the Life	Details
What are the typical tasks the Persona does each day with the amount of time associated with each?	Reviewing tickets (1 hour), team meetings (1 hour), responding to escalated issues (2 hours), training staff (1 hour), administrative tasks (1 hour)
Which of these typical tasks are habits?	Reviewing tickets and team meetings
Which require the most effort?	Responding to escalated issues
Which does the Persona enjoy?	Training staff and improving processes
Which does the Persona not enjoy?	Administrative tasks
What makes it a good day for the Persona?	Resolving a high volume of tickets and receiving positive feedback from customers

What makes it a bad day?	High ticket volume with unresolved issues and negative customer feedback
Who is the Persona trying to please the most?	Her team and upper management
What is the top priority of the person/people the Persona is trying to please?	Achieving high customer satisfaction scores

Priorities	Weighting
1. Meeting customer satisfaction goals	40%
2. Reducing ticket resolution time	30%
3. Supporting team development	20%
4. Maintaining a positive work environment	10%

Economic Buyer Profile Summary

The economic buyer for the Customer Support Ticket Triage & Resolution startup is likely a Chief Operating Officer (COO) or a Director of Operations in a mid-sized tech company. They are responsible for overseeing the customer support department and ensuring that it operates efficiently. This buyer is focused on improving operational metrics and reducing costs while maintaining high service quality. They are motivated by the need to enhance customer satisfaction and drive business growth. Their primary challenge is balancing budget constraints with the need for effective support solutions.

Demographics	Details
Gender	Male
Age	45
Income	\$150,000
Education level	Master's
Education specifics	M.B.A. from Harvard Business School
Employment History	15 years in operations management, previous roles include Operations Manager at TechCorp
Marital Status	Married
Kids & other family info	3 children, ages 10, 12, and 15
Ethnicity	Hispanic
Political Affiliations	Conservative

Psychographics	Details
Why do they do this job or live the life they do	Driven by a desire to optimize operations and improve customer experiences
Hobbies	Golf, traveling, and reading business books
Heroes	Elon Musk, for his innovative approach to business
Aspirations in life	To become a CEO and lead a successful company
Fears in life	Failing to meet business goals and losing competitive edge
Personality Traits	Analytical, strategic, and results-oriented

Interesting habits	Regularly attends industry conferences and networking events
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Proxy Products	Details
Is there a product or products that the Persona needs to have in order to get benefit from yours?	Business intelligence tools, customer support software
Are there products the Persona uses that embody the psychographics & demographics from the end user profile?	Project management software like Asana or Monday.com
Any other unusual or interesting products of note that the Persona has?	Uses advanced analytics tools for performance tracking

Watering Holes	Details
Favorite sources for news	Wall Street Journal, Harvard Business Review, industry podcasts
Places where they congregate with other similar people	Business networking events, industry conferences
Associations they belong to and the importance of each	Member of the National Association of Professional Executives, which provides resources and networking opportunities
Where does the Persona go for expert advice and/or to get questions answered?	Business forums, LinkedIn groups, and mentorship programs

Day in the Life	Details
What are the typical tasks the Persona does each day with the amount of time associated with each?	Reviewing operational metrics (1 hour), meetings with department heads (2 hours), strategic planning (2 hours), responding to emails (1 hour), networking (1 hour)
Which of these typical tasks are habits?	Reviewing operational metrics and meetings with department heads
Which require the most effort?	Strategic planning
Which does the Persona enjoy?	Networking and discussing innovative ideas
Which does the Persona not enjoy?	Responding to emails
What makes it a good day for the Persona?	Achieving operational goals and receiving positive feedback from peers
What makes it a bad day?	Failing to meet key performance indicators and dealing with unresolved issues
Who is the Persona trying to please the most?	The CEO and board of directors
What is the top priority of the person/people the Persona is trying to please?	Achieving business growth and operational efficiency

Priorities	Weighting
1. Improving operational efficiency	40%
2. Enhancing customer satisfaction	30%
3. Reducing operational costs	20%
4. Supporting team development	10%

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Life cycle use case

The startup idea of **Customer Support Ticket Triage & Resolution** aims to enhance the efficiency of customer support operations by utilizing AI to categorize support tickets and assess their urgency. This system not only assigns tickets to the appropriate teams but also suggests solutions from a knowledge base, thereby expediting first-response times. The persona for this startup is likely a customer support manager or team lead who is overwhelmed by the volume of incoming tickets and struggles to ensure timely and accurate responses. Currently, they may rely on manual processes or basic ticketing systems that do not effectively prioritize or categorize issues, leading to delays and customer dissatisfaction. The experience of this persona begins with the recognition of a growing backlog of unresolved tickets, which creates stress and impacts team morale. They may feel the pressure to improve response times and customer satisfaction scores, prompting them to seek out solutions.

The opportunity for improvement lies in streamlining the ticket triage process, reducing the cognitive load on support staff, and enhancing the overall customer experience. By implementing an AI-driven solution, the persona can automate routine tasks, allowing their team to focus on more complex issues that require human intervention. This not only improves efficiency but also fosters a more positive work environment, as team members can engage in more meaningful interactions with customers.

Who is involved	When	Where	How
Customer Support Manager	When ticket volume increases	Office or remote work environment	They recognize the need for a more efficient system due to backlog and customer complaints.
Customer Support Team	During daily operations	Customer support center or remote	They discuss options during team meetings or training sessions.
IT Department	When evaluating new tools	Office or virtual meetings	They research and present potential solutions to management.
Vendors/Solution Providers	During the product discovery phase	Online or at industry events	They provide demos and case studies to showcase their solutions.
Customer Support Manager	After identifying potential solutions	Office or remote	They compare features, pricing, and reviews of different products.
Customer Support Manager	Upon deciding to implement a solution	Office or remote	They contact the vendor to purchase the product, often through a formal procurement process.
IT Department	During the implementation phase	Office or remote	They work with the vendor to install and configure the software.
Customer Support Team	After installation	Customer support center or remote	They use the product to manage tickets, categorize issues, and access suggested solutions.
Customer Support Manager	After using the product	Office or remote	They assess performance metrics, such as response times and customer satisfaction scores, to evaluate the product's impact.
Customer Support Manager	When needing additional features or licenses	Office or remote	They reach out to the vendor for upgrades or additional purchases.
Customer Support Team	After positive experiences	Office or remote	They share their experiences with peers and recommend the product in industry forums or social media.

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High-level specs

Persona's Priority 1	Persona's Priority 2	Persona's Priority 3
How will you deliver a new level of value with respect to this priority? By utilizing AI to accurately categorize and prioritize support tickets, ensuring that they are directed to the appropriate teams swiftly.	How will you deliver a new level of value with respect to this priority? By integrating a knowledge base that automatically suggests solutions, reducing the time agents spend searching for answers.	How will you deliver a new level of value with respect to this priority? By providing analytics and reporting features that help teams understand ticket trends and improve response strategies.
What features address this priority? AI-based ticket categorization, urgency scoring, and automated ticket assignment.	What features address this priority? Knowledge base integration, automated solution suggestions, and user-friendly interface for agents.	What features address this priority? Analytics dashboard, reporting tools, and performance metrics.
What functions address this priority? Real-time ticket processing, machine learning algorithms for categorization, and team assignment protocols.	What functions address this priority? Searchable knowledge base, solution recommendation engine, and agent workflow management.	What functions address this priority? Data visualization tools, trend analysis, and feedback loops for continuous improvement.
What benefits address this priority? Faster ticket resolution times, improved customer satisfaction, and reduced workload for support teams.	What benefits address this priority? Increased first-response rates, enhanced agent efficiency, and better customer experience.	What benefits address this priority? Informed decision-making, proactive support strategies, and continuous improvement in service delivery.

1. First draft of company name and tag line:

Name: TriageAI

Tagline: "Streamlining Support, One Ticket at a Time"

2. Name of product and tag line:

Product Name: TriagePro

Tagline: "AI-Powered Ticket Management for Unmatched Efficiency"

3. Clearly identified benefits aligned with the Persona's #1 priority:

"Experience lightning-fast ticket resolution with TriagePro's AI-driven categorization and urgency scoring."

4. Two additional benefits:

- o "Boost agent productivity with automated solution suggestions from our extensive knowledge base."
- o "Gain insights into support trends with our powerful analytics dashboard."

5. Provide a sense of the magnitude of the benefit to be expected by the end user:

"With TriagePro, expect a 50% reduction in ticket resolution time, leading to happier customers and a more efficient support team."

6. Have a clear call to action:

"Transform your customer support experience today! Sign up for a free trial of TriagePro and see the difference."

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Quantify value proposition

Here is a table summarizing the value proposition for your startup idea, "Customer Support Ticket Triage & Resolution":

Question	Answer
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What is the Persona's #1 priority?	Efficient ticket resolution.
What units should it be measured in?	Time (minutes/hours) and customer satisfaction scores.
General Verbal Description of the "As Is" State and the Opportunities for Improvement	Currently, customer support teams manually categorize and assign tickets, leading to delays and potential misassignments. This results in longer resolution times and decreased customer satisfaction. Opportunities for improvement include automating the categorization and assignment process to reduce human error and speed up response times.
General Verbal Description of the "Possible" State and the Opportunities for Improvement	With the proposed AI-based solution, tickets are automatically categorized and assigned to the appropriate teams based on urgency. This reduces the time taken to address issues and increases the accuracy of ticket handling. Additionally, by suggesting solutions from a knowledge base, first-response times are significantly improved, leading to higher customer satisfaction.

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Next 10 customers

Here is the table summarizing potential customers for your startup idea, **Customer Support Ticket Triage & Resolution**:

Customer Name	Relevant Info	Title	Demo-graphic	Psycho-graphic	Use Case	Value Prop
1	IT Manager at a mid-sized tech company	IT Support	30-45 years old, Tech-savvy	Values efficiency, seeks to reduce response times	Automating ticket assignment	Faster ticket resolution, improved customer satisfaction
2	Customer Service Director at a retail chain	Customer Service	35-50 years old, Retail experience	Focused on customer experience, data-driven	Streamlining support processes	Reduced workload for support staff
3	Operations Manager at a logistics firm	Operations	30-50 years old, Logistics background	Prioritizes operational efficiency	Managing support tickets effectively	Enhanced team productivity
4	CTO of a SaaS startup	Technology	25-40 years old, Startup culture	Innovative, open to new technologies	Improving support response times	Cost-effective support solutions
5	Customer Experience Manager at a financial institution	Customer Experience	30-55 years old, Financial services	Customer-centric, risk-averse	Enhancing customer support	Increased customer loyalty
6	Help Desk Supervisor at a university	Education	25-45 years old, Education sector	Values collaboration, community-focused	Managing student support tickets	Improved student satisfaction
7	Service Desk Analyst at a government agency	Government	30-50 years old, Public sector	Compliance-focused, process-oriented	Handling citizen inquiries	Streamlined government services
	Head of Support at a		35-55 years old, Telecom	Efficient	Competitive	High

8	telecommunications company	Telecommunications	experience Results-driven, competitive	ticket resolution	advantage in service	interest
9	Product Manager at a software company	Product Management	28-45 years old, Software industry	Analytical, user-focused	Integrating support with product development	Better product feedback loop
10	Customer Success Manager at a B2B company	Customer Success	30-50 years old, B2B experience	Relationship-oriented, proactive	Ensuring customer satisfaction	Higher retention rates

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Define core

Question	Answer
Value Proposition	Our startup offers an AI-driven customer support ticket triage and resolution system that efficiently assigns tickets to the appropriate teams based on categorization and urgency scoring. By automatically proposing solutions from a knowledge base, we significantly speed up first-response times, enhancing customer satisfaction and operational efficiency.
Assets (Ranked from Strongest to Weakest)	1. AI Technology: Our proprietary AI algorithms for ticket categorization and urgency scoring are advanced and difficult to replicate. 2. Knowledge Base: A comprehensive and continually updated knowledge base that provides quick solutions to common issues. 3. Team Expertise: A skilled team with experience in AI and customer support systems. 4. Customer Relationships: Established relationships with initial customers for feedback and improvement. 5. Market Understanding: Insights into customer support challenges and needs.
Proposed Moats	1. Proprietary Data: Accumulating unique data from customer interactions to improve AI algorithms and service offerings. 2. Network Effects: As more customers use the system, the knowledge base and AI accuracy improve, creating a self-reinforcing cycle. 3. Customer Loyalty: High satisfaction rates leading to repeat business and referrals.
Potential Cores	1. AI-Driven Insights: The ability to provide actionable insights from customer data that competitors cannot easily replicate. 2. Scalability: A system that can easily scale with growing customer needs without significant additional costs. 3. Integration Capabilities: Seamless integration with existing customer support platforms, enhancing user experience.

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Chart competitive position

Competitor Name	Positioning in Competitive Landscape	Key Differentiators
Zendesk	Established player in customer support with a strong focus on ticket management and analytics.	Comprehensive platform with extensive integrations, but lacks advanced AI categorization and urgency scoring.
Freshdesk	Similar to Zendesk, offers ticketing and customer support solutions but with a more user-friendly interface.	Good for small to medium businesses, but may not have the same level of AI-driven automation as your solution.
ServiceNow	Focuses on enterprise-level IT service management, including ticketing.	Strong in ITSM but may not cater to broader customer support needs or have the same AI capabilities.
Intercom	Emphasizes real-time customer communication and support, integrating chat and ticketing.	Strong in conversational support but may not have the same depth in ticket triage and resolution automation.

Do Nothing (Status Quo)	Manual ticket assignment and resolution processes, often leading to delays and inefficiencies.	Current systems lack automation and AI, resulting in slower response times and potential misrouting of tickets.
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Analysis

1. Positioning Relative to Competition:

- Your startup is positioned in the upper-right corner due to its unique AI-based categorization and urgency scoring, which significantly enhances ticket triage and resolution speed. Competitors like Zendesk and Freshdesk are close but do not offer the same level of automation and efficiency.

2. Core Value Proposition:

- Your core technology leverages advanced AI to not only categorize tickets but also to propose solutions from a knowledge base, which allows for faster first-response times. This capability provides a clear advantage over competitors who rely on more traditional methods of ticket management.

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Determine DMU

End User Persona	Economic Buyer Persona	Champion Persona
Name	Customer Support Agent	Customer Support Manager
Title	Support Agent	Support Operations Manager
Demographic Summary	Typically aged 25-40, often with a background in customer service or IT support.	Aged 30-50, often with several years of experience in customer support management.
Psychographic Summary	Values efficiency, enjoys problem-solving, and seeks tools that enhance productivity.	Focused on team performance, customer satisfaction, and operational efficiency.
Proxy Products	Existing ticketing systems (e.g., Zendesk, Freshdesk)	Budgeting tools, performance analytics software
Watering Holes	Online forums, customer support communities, LinkedIn groups	Industry conferences, management workshops, LinkedIn
Day In the Life	Handles incoming tickets, categorizes issues, and resolves customer queries.	Reviews team performance, strategizes improvements, and manages resources.
Priorities (Top 4 in order)	1. Quick resolution of tickets 2. User-friendly tools 3. Continuous learning 4. Team collaboration	1. Team efficiency 2. Customer satisfaction 3. Cost management 4. Staff training
Key Selling Points to this Person	1. AI-driven categorization saves time 2. Faster first-response times 3. Reduces ticket backlog 4. Easy integration with existing systems	1. Improves team productivity 2. Enhances customer satisfaction metrics 3. Provides actionable insights 4. Cost-effective solution

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Map customer acquisition process

Here is the table based on your startup idea "Customer Support Ticket Triage & Resolution":

	What does			How much			
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Stage	the customer do in this stage?	Who is involved from the DMU?	Budget limits & other considerations	time will this stage take?	Action plan to accomplish stage	Risks	Risk mitigation strategies
Determine Need & Catalyst to Action	Identify the need for efficient ticket resolution and urgency scoring.	Customer Support Managers, IT Managers	Budget for software solutions, urgency of ticket resolution	1-2 weeks	Conduct surveys and interviews with potential users to understand their pain points.	Misunderstanding customer needs	Regular feedback sessions with potential users
Find Out about Options	Research available solutions for ticket triage and resolution.	Customer Support Managers, IT Managers	Budget constraints for software purchases	2-4 weeks	Create a list of potential solutions and their features.	Overwhelmed by options	Narrow down options on key features and price points
Analyze Options	Evaluate the pros and cons of each solution based on features, pricing, and user feedback.	Customer Support Managers, IT Managers, Finance	Budget limits for software solutions	1-3 weeks	Develop a scoring system to compare options based on key criteria.	Choosing the wrong solution	Involve multiple stakeholders in the decision-making process
Acquire Your Product	Finalize the purchase of the selected solution.	Procurement, IT Managers	Approval from finance department	1-2 weeks	Prepare and submit purchase order, negotiate terms if necessary.	Delays in procurement process	Establish communication with procurement team.
Pay	Complete the payment process for the software solution.	Finance, Procurement	Payment method and timing	1 week	Ensure all financial documentation is in order for payment processing.	Payment delays	Confirm payment details with finance department
Install	Set up the software solution within the customer support system.	IT Team, Customer Support Managers	Installation costs, potential downtime	2-4 weeks	Schedule installation and training sessions for staff.	Technical issues during installation	Have support team stand by for installation issues
Use & Get Value	Begin using the software to triage and resolve tickets.	Customer Support Staff	Training budget for staff	Ongoing	Monitor usage and gather feedback from users to ensure effectiveness.	Resistance to change from staff	Provide training and support during transition
Determine Value	Assess the impact of the software on ticket resolution times and customer satisfaction.	Customer Support Managers, IT Managers	Metrics for success (e.g., ticket resolution time)	1-2 months	Analyze data on ticket resolution times and customer feedback.	Inability to measure success	Set clear metrics and regularly evaluate performance
Buy More	Decide whether to purchase additional licenses or	Customer Support Managers,	Budget for additional	1-2	Review initial success and present findings to decision-	Budget constraints for additional	Prepare business case for additional purchases

	features based on initial success.	Finance	purchases	months	makers for further investment.	purchases	invest
Tell Others	Share experiences and results with other departments or companies.	Customer Support Managers, Marketing	Potential for referrals and case studies	Ongoing	Create case studies and testimonials to share with other departments and potential customers.	Negative feedback from others	Addre conce highli positi outco

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Follow on TAM

Summary of Follow-on TAM Estimate and Priorities

Candidate	How it Leverages Your Core	Same Product or Same Customer?	Pros of Selling to This Market	Cons of Selling to This Market	TAM Est.	Other Considerations	Rank
1. IT Helpdesk Automation	Utilizes AI for ticket categorization	Same Product	High demand for efficiency in IT support	Competition from established players	\$200M	Requires integration with existing IT systems	1
2. E-commerce Customer Support	Adapts solution for online retail environments	Same Product	Growing e-commerce sector, need for quick resolutions	Different customer expectations and needs	\$150M	High volume of tickets, but varied product types	2
3. Healthcare Ticket Management	Tailors for healthcare service requests	Same Product	Critical need for timely responses in healthcare	Regulatory challenges and data privacy concerns	\$300M	High stakes, but potential for high impact	3
4. Telecom Customer Service	Focuses on telecom service inquiries	Same Product	Large customer base, need for rapid issue resolution	High competition and customer churn	\$250M	Requires adaptation to telecom-specific issues	4
5. Government Services Support	Customizes for public sector inquiries	Same Product	Stable demand, potential for long-term contracts	Bureaucratic processes can slow down sales cycles	\$100M	Long sales cycles, but potential for large contracts	5

Individual Worksheet for Each Follow-on Market Segment

Follow-on Market Segment Candidate Name: IT Helpdesk Automation	Estimate # of Users	Estimate Revenue per year per user	Estimate TAM Range	CAGR Estimate	Other Considerations (profitability, time to conquer, potential market share, investment required, competition, etc.)	Other Comments
						Strong

	500,000	\$400	\$200M	15%	High profitability due to low operational costs; requires integration with existing IT systems	market need for efficiency in IT support
Follow-on Market Segment Candidate Name: E-commerce Customer Support	Estimate # of Users	Estimate Revenue per year per user	Estimate TAM Range	CAGR Estimate	Other Considerations (profitability, time to conquer, potential market share, investment required, competition, etc.)	Other Comments
	300,000	\$500	\$150M	20%	High volume of tickets; varied product types may complicate support; requires tailored solutions	Growing e-commerce sector
Follow-on Market Segment Candidate Name: Healthcare Ticket Management	Estimate # of Users	Estimate Revenue per year per user	Estimate TAM Range	CAGR Estimate	Other Considerations (profitability, time to conquer, potential market share, investment required, competition, etc.)	Other Comments
	200,000	\$1,500	\$300M	10%	High stakes; potential for high impact; regulatory challenges and data privacy concerns	Critical need for timely responses
Follow-on Market Segment Candidate Name: Telecom Customer Service	Estimate # of Users	Estimate Revenue per year per user	Estimate TAM Range	CAGR Estimate	Other Considerations (profitability, time to conquer, potential market share, investment required, competition, etc.)	Other Comments
	400,000	\$625	\$250M	12%	Requires adaptation to telecom-specific issues; high competition and customer churn	Large customer base
Follow-on Market Segment Candidate Name: Government Services Support	Estimate # of Users	Estimate Revenue per year per user	Estimate TAM Range	CAGR Estimate	Other Considerations (profitability, time to conquer, potential market share, investment required, competition, etc.)	Other Comments
	100,000	\$1,000	\$100M	8%	Long sales cycles; potential for large contracts; bureaucratic processes can slow down sales cycles	Stable demand

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Design business model

Customer Analysis

Question	Response
Looking at the DMU, what is important?	Efficient ticket resolution, accurate categorization, and timely responses are crucial for customer satisfaction.
Preference for upfront or recurring expense for the DMU?	Recurring expenses may be preferred for ongoing support and updates, but an upfront cost for initial setup could also be viable.
Other considerations	Integration with existing systems, ease of use, and training for staff are important factors.

Value Creation

Question	Response
How much value do they get?	Significant value through reduced response times, improved ticket resolution rates, and enhanced customer satisfaction.
When do they get value?	Value is realized immediately upon implementation and continues as the system learns and improves over time.
How risky is it?	Moderate risk; depends on the accuracy of AI categorization and the quality of the knowledge base.
Other considerations	Potential for initial resistance from staff accustomed to traditional methods.

Competition Analysis

Question	Response
Who is the competition and what business model do they use?	Competitors include Zendesk and Freshdesk, using subscription-based models.
How locked are they in this model?	Competitors are somewhat locked in due to established customer bases and integration with other tools.
Could I disrupt the industry? What are the risks of it?	Yes, by offering superior AI capabilities; risks include high development costs and market entry barriers.
Other considerations	Need to ensure compliance with data privacy regulations.

Internal Analysis

Question	Response
Effect of Sales Cycle	The sales cycle may be longer due to the need for demos and integration discussions.
Customer acquisition cost	Estimated at \$500 per customer, including marketing and sales efforts.
What is the Lifetime Value of this customer?	Estimated at \$5,000 over a 3-year period, assuming a monthly subscription model.
How are we going to distribute the product to this user?	Direct sales through a dedicated sales team and online marketing.
What is the cashflow?	Initial cash flow may be negative due to setup costs, but positive cash flow expected within 6 months.
Operations and other considerations	Need for ongoing support and updates; potential for a dedicated customer success team.

Potential Units to Charge For

Potential Units	Pros	Cons
Subscription per user	Predictable revenue, scalable	May deter smaller clients
One-time setup fee	Immediate cash flow	High upfront cost may be a barrier
Pay-per-ticket resolution	Aligns cost with usage	Revenue may be unpredictable

Tiered pricing based on features	Flexibility for customers	Complexity in pricing structure
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Summary of Business Model Candidates

Option	Unit	Customer Fit	Value Creation Fit	Competition Fit	Internal Fit	Pros	Cons	Grade
1	Subscription per user	High	High	Moderate	High	Predictable revenue	May deter smaller clients	A
2	One-time setup fee	Moderate	Moderate	High	Moderate	Immediate cash flow	High upfront cost	B
3	Pay-per-ticket resolution	Moderate	High	Low	Moderate	Aligns cost with usage	Unpredictable revenue	C
4	Tiered pricing based on features	High	High	Moderate	Moderate	Flexibility for customers	Complexity in pricing	B

Suggested Business Model

I suggest choosing the **Subscription per user** model. This model provides predictable revenue, aligns well with customer needs for ongoing support, and allows for scalability as the customer base grows. It also positions your startup competitively against existing players in the market.

Testing Hypotheses

Question	Response
What hypotheses are you assuming to be true for the business model(s) you have chosen?	Customers will prefer a subscription model for ongoing support and updates.
What experiments will you run to test your hypotheses?	Conduct surveys and interviews with potential customers to gauge interest in subscription vs. one-time fees.
What information will show whether your hypotheses are valid or invalid?	Customer feedback on pricing preferences and willingness to pay for different models.
How long will you give the experiments to run?	4-6 weeks to gather sufficient data and insights.

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Pricing framework

Customer Decision Making Unit

Aspect	Details
Important Factors	Decision-makers value efficiency, accuracy in ticket assignment, and speed of resolution. They also consider the integration with existing systems and the potential for cost savings.
Spending Limits	Typically, the economic buyer may have a budget limit of \$5,000 to \$10,000 for software solutions, depending on the size of the organization.

Other Considerations	The decision-making process may involve multiple stakeholders, including IT, customer service, and finance departments. Understanding their concerns and priorities is crucial.
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Nature of Customer

Aspect	Details
Customer Segment	Early Adopters, particularly in tech-savvy organizations that prioritize customer service efficiency.
How to Find Out	Market research, surveys, and interviews with potential customers to gauge their willingness to adopt new technologies.
Percentage of Segments	Early Adopters: 20%, Early Majority: 40%, Late Majority: 30%, Laggards: 10%.

Value Creation

Aspect	Details
Value to User	Users gain faster ticket resolution, reduced workload for support teams, and improved customer satisfaction.
When	Value is realized immediately upon implementation and continues as the system learns and improves over time.
Risk Level	Moderate risk; initial adoption may face resistance, but the long-term benefits outweigh the risks.
Other Considerations	Providing a trial period or pilot program can help mitigate perceived risks.

Category of Competition

Aspect	Details
Competition	1. Zendesk (Pricing: \$49/month/user) 2. Freshdesk (Pricing: \$15/month/user) 3. ServiceNow (Pricing: \$100/month/user)
Best Comparable	Freshdesk is the best comparable due to its similar target market and pricing structure.
Price Range Indication	The price range should be between \$15 to \$49 per user per month, depending on features offered.
Other Considerations	Emphasizing unique features like AI categorization and urgency scoring can justify a higher price point.

Strength of Core

Aspect	Details
Core Strength	The core is strong due to unique AI capabilities that enhance ticket triage and resolution.
Future Strength	It is expected to get stronger as the AI learns from more data over time, improving accuracy and efficiency.
Price Increase Potential	Yes, prices can be raised in the future as the product matures and additional features are added.
Other Considerations	Continuous improvement and customer feedback will be essential to maintain competitive advantage.

Maturity of Your Product

Aspect	Details
Product Validation	The product is in the validation stage; pilot programs with early adopters can help confirm its value proposition.
Perceived Risk	Customers may see the company as high risk initially due to the new technology.
Flexibility for First Customer	Offering discounts or extended trial periods can help reduce perceived risks for early customers.
Other Considerations	Building strong case studies from early adopters can enhance credibility and reduce perceived risk.

Initial Decision and Rationale

Aspect	Details
Unit of Product for Pricing	Monthly subscription per user.
Price Range	The most appropriate price range is \$15 to \$49 per user per month, based on competitor analysis and value provided.
Initial Listed Price	The initial listed price will be \$29 per user per month, with an effective price of \$24 after discounts for early adopters.
Sanity Check	Estimated marginal cost is \$5 per user per month, which allows for a significant margin over the long term.

Test to Validate

Aspect	Details
Hypotheses	Customers will value faster ticket resolution and improved customer satisfaction enough to pay for the service.
Experiments	Conduct A/B testing with different pricing tiers and features to gauge customer response.
Validity Indicators	Customer sign-ups, feedback on pricing, and usage metrics will indicate whether hypotheses are valid.
Experiment Duration	Experiments will run for 3 months to gather sufficient data.

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LTV

Inputs to the Worksheet

Description of the Input	Best Estimate and Calculations	Explanation
One-Time Charge(s)	\$5,000	This is the estimated price for the initial setup of the AI-based ticket triage system.

Estimated Profit Margin on One-Time Charges	70%	Assuming a cost of \$1,500 for setup and maintenance, the profit margin is calculated as $(5000-1500)/5000 = 70\%$.				
Life of the Product	5 years	The expected lifespan of the software before significant upgrades or replacements are needed.				
% of Customers Who Will Repurchase	60%	Based on industry standards for software, we estimate that 60% of customers will renew their licenses.				
Recurring Revenue Streams	\$1,200/year	This is the estimated annual subscription fee for ongoing support and updates after the initial purchase.				
Profit Margin on Recurring Revenue Streams	80%	Assuming a cost of \$240 for support and updates, the profit margin is $(1200-240)/1200 = 80\%$.				
Retention Rate for Recurring Revenue Streams	After 1st year: 90%	After 2nd year: 85%	After 3rd year: 80%	After 4th year: 75%	After 5th year: 70%	These rates reflect a gradual decline in customer retention over time.
Other Revenue Sources	None	Currently, there are no additional revenue sources planned beyond the initial and recurring charges.				
Profit Margin on Other Revenue Sources	N/A	Not applicable as there are no other revenue sources.				
Cost of Capital	50%	A high cost of capital is assumed for a startup in the tech industry.				

Calculations to Estimate the LTV

Row	Description	t=0	t=1	t=2	t=3	t=4	t=5
A	One-Time Charge Revenue	\$5,000	\$0	\$0	\$0	\$0	\$0
B	Recurring Revenue	\$0	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200
C	Total Revenue	\$5,000	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200
D	Profit from One-Time Charge	\$3,500	\$0	\$0	\$0	\$0	\$0
E	Profit from Recurring Revenue	\$0	\$960	\$960	\$960	\$960	\$960
F	Total Profit	\$3,500	\$960	\$960	\$960	\$960	\$960
G	Present Value Factor (PVF)	1.00	0.67	0.45	0.30	0.20	0.13
H	Present Value of Profit	\$3,500	\$640	\$432	\$288	\$192	\$124
I	Total Present Value of Profit	\$3,500	\$640	\$432	\$288	\$192	\$124
J	LTV (Total Present Value)	\$5,000	\$4,640	\$4,208	\$3,920	\$3,728	\$3,604

Explanation for Calculations:

- **One-Time Charge Revenue** : The initial revenue from the setup fee is received at $t=0$.
- **Recurring Revenue**: This is the annual subscription fee received at the end of each year.
- **Total Revenue**: The sum of one-time and recurring revenue.
- **Profit from One-Time Charge** : Calculated as 70% of the one-time charge.
- **Profit from Recurring Revenue**: Calculated as 80% of the recurring revenue.
- **Total Profit**: The sum of profits from one-time and recurring revenue.
- **Present Value Factor (PVF)**: Calculated using the formula $PV = FV * (1 / (1+i)^t)$ where $i = 50\%$.
- **Present Value of Profit**: Total profit multiplied by the present value factor.
- **Total Present Value of Profit**: Cumulative present value of profits over the years.
- **LTV**: The total present value of profits over the 5-year period.

Interpretation of Estimation

Question	Answer	Explanation
What would you round your LTV estimation to? What range do you feel comfortable with?	\$3,500 - \$4,500	Based on the calculations, the LTV is around \$3,604, which is reasonable for a software product.
Where do you feel the biggest unknowns are in your LTV estimation calculation?	Customer retention rates	Retention rates can vary significantly based on customer satisfaction and market competition.
Does the number seem reasonable?	Yes	The LTV aligns with industry standards for software solutions, making it a reasonable estimate.
What are the key drivers of the LTV if you want to increase it?	Customer retention and upselling	Improving retention rates and offering additional services can significantly increase LTV.
Where do you think you have the greatest opportunity to increase LTV all things considered?	Enhancing customer support	Providing exceptional customer support can lead to higher retention and upselling opportunities.

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Map sales process

Sales Channels for the Short, Medium, and Long Term

Sales Channel	Short Term	Medium Term	Long Term
Direct Sales	Founder-led sales	Inside sales team	Automated sales
Digital Marketing	SEO and social media campaigns	Email marketing and webinars	Content marketing and PLG
Partnerships	Collaborations with tech companies	Value-added resellers (VARs)	Strategic partnerships
Customer Referrals	Incentivized referral programs	Loyalty programs	Community building
Trade Shows	Participation in industry events	Sponsorships and speaking	Hosting own events
Online Marketplaces	Listing on platforms like G2	Expanding to niche platforms	Building a proprietary platform
Customer Success	Initial onboarding and support	Dedicated customer success teams	Continuous engagement and upselling
Content Marketing	Blog posts and case studies	E-books and whitepapers	Webinars and advanced content

Influencer Marketing	Engaging industry influencers	Long-term partnerships	Brand ambassadors
Direct Outreach	Cold emailing potential clients	Targeted outreach campaigns	Account-based marketing

Sales Funnel Inputs

Section	Short Term	Medium Term	Long Term
Awareness	Social media ads, SEO	Webinars, industry events	Content marketing
Interest	Free trials, demos	Case studies, testimonials	Advanced product features
Consideration	Personalized follow-ups	Product comparisons	Customer success stories
Intent	Pricing discussions	Proposal submissions	Contract negotiations
Evaluation	Customer feedback sessions	Pilot programs	Long-term contracts
Purchase	Direct sales	Online purchases	Subscription models
Post-Purchase	Onboarding support	Customer success follow-ups	Upselling and renewals

Summary of Techniques and Actions to Maximize Yield

Technique(s)	How to Maximize Conversion	Done by Who?	When?
Direct Sales	Personalize pitches	Sales team	Short Term
Digital Marketing	Optimize ad spend	Marketing team	Short Term
Partnerships	Leverage partner networks	Business Dev.	Medium Term
Customer Referrals	Create referral incentives	Marketing team	Medium Term
Trade Shows	Engage attendees with demos	Sales team	Short Term
Online Marketplaces	Optimize listings for visibility	Marketing team	Short Term
Customer Success	Regular check-ins	Customer Success	Medium Term
Content Marketing	Create valuable content	Marketing team	Long Term
Influencer Marketing	Build relationships with influencers	Marketing team	Medium Term
Direct Outreach	Targeted campaigns	Sales team	Medium Term

Risk Factors

Risk Factor	How to Mitigate the Risk	Metrics (to Monitor and Mitigate as Needed)	Potential Intervention Strategy
Market Adoption	Conduct market research	Customer feedback, engagement rates	Pivot product features based on feedback
Competition	Differentiate product offerings	Market share, competitor analysis	Adjust pricing or add unique features
Customer Retention	Invest in customer success	Churn rate, customer satisfaction scores	Implement loyalty programs

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COCA

Assumptions for COCA Estimation

Time Period	Start Date	End Date	Explanation
Short Term - Initial Market Entry	0 months	6 months	This period is focused on launching the product and acquiring initial customers.
Medium Term - Gaining Market Traction	6 months	24 months	This phase involves scaling operations and increasing customer acquisition efforts.
Long Term - Steady State	24 months	60 months	This period represents a mature stage where the business stabilizes and optimizes customer retention.

Marketing Expenses

Marketing Expenses - Short Term - Initial Market Entry

Expense Type	Cost (\$)	Explanation
Digital Marketing	10,000	Initial online advertising to create awareness and attract early adopters.
Content Creation	5,000	Development of marketing materials and educational content to support customer acquisition.
Social Media Advertising	7,000	Targeted ads on social media platforms to reach potential customers.
Total Costs	22,000	

Marketing Expenses - Medium Term - Gaining Market Traction

Expense Type	Cost (\$)	Explanation
Digital Marketing	20,000	Increased online advertising budget to scale customer acquisition efforts.
Content Creation	10,000	Ongoing content development to maintain engagement and support sales.
Social Media Advertising	15,000	Expanded social media campaigns to reach a broader audience.
Total Costs	45,000	

Marketing Expenses - Long Term - Steady State

Expense Type	Cost (\$)	Explanation
Digital Marketing	30,000	Sustained online presence to maintain market share and attract new customers.
Content Creation	15,000	Continuous content updates and new material to keep the audience engaged.

Social Media Advertising	20,000	Ongoing social media strategy to retain and attract customers.
Total Costs	65,000	

Sales Expenses

Sales Expenses - Short Term - Initial Market Entry

Expense Type	Cost (\$)	Explanation
Sales Team Salaries	15,000	Initial hiring of sales personnel to drive customer acquisition.
Sales Training	3,000	Training for the sales team on product features and customer engagement strategies.
CRM Software	2,000	Initial investment in customer relationship management software to track leads.
Total Costs	20,000	

Sales Expenses - Medium Term - Gaining Market Traction

Expense Type	Cost (\$)	Explanation
Sales Team Salaries	30,000	Increased salaries to support a larger sales team as customer base grows.
Sales Training	5,000	Ongoing training to improve sales techniques and product knowledge.
CRM Software	4,000	Upgraded CRM tools to manage a growing customer base.
Total Costs	39,000	

Sales Expenses - Long Term - Steady State

Expense Type	Cost (\$)	Explanation
Sales Team Salaries	50,000	Sustained salaries for a well-established sales team.
Sales Training	10,000	Regular training sessions to keep the team updated on market trends and product changes.
CRM Software	6,000	Continued investment in CRM tools for efficiency and customer management.
Total Costs	66,000	

R&D Expenses

R&D Expenses - Short Term - Initial Market Entry

Expense Type	Cost (\$)	Explanation
Product Development	25,000	Initial development costs for the AI-based ticket triage system.
Testing and QA	10,000	Quality assurance and testing to ensure product reliability.
Total Costs	35,000	

R&D Expenses - Medium Term - Gaining Market Traction

Expense Type	Cost (\$)	Explanation
Product Development	50,000	Ongoing development to enhance features based on user feedback.
Testing and QA	20,000	Continued testing to maintain product quality as new features are added.
Total Costs	70,000	

R&D Expenses - Long Term - Steady State

Expense Type	Cost (\$)	Explanation
Product Development	75,000	Sustained investment in product development to stay competitive.
Testing and QA	30,000	Regular testing to ensure high standards and reliability.
Total Costs	105,000	

Estimate the Cost of Customer Acquisition (COCA)

Year	New Customers Forecasted	All Sales Expenses for Period (\$)	All Marketing Expenses for Period (\$)	Total Marketing & Sales Expenses for Period (\$)	COCA (\$)
1	100	20,000	22,000	42,000	420
2	300	39,000	45,000	84,000	280
3	600	66,000	65,000	131,000	218.33
4	1,000	66,000	65,000	131,000	131
5	1,500	66,000	65,000	131,000	87.33

COCA for Each Time Period

Time Period	COCA Range (\$)
Short Term - Initial Market Entry	400 - 450
Medium Term - Gaining Market Traction	250 - 300
Long Term - Steady State	100 - 150

Key Drivers of COCA and Ways to Decrease It

Key Driver	Effect	Action Possible to Decrease	Risk
Customer Acquisition Strategy	High	Optimize digital marketing and sales processes.	Medium
Sales Cycle Length	Medium	Streamline sales processes to reduce time.	Medium
Customer Retention Rate	High	Implement customer success initiatives.	Low

Comparison of LTV and COCA Over Time

Time Period	LTV (\$)	COCA (\$)
Short Term - Initial Market Entry	1,200	420
Medium Term - Gaining Market Traction	1,500	280
Long Term - Steady State	2,000	131

Basic 3x Test

Time Period	LTV to COCA Ratio	Meets 3x Threshold	Explanation
Short Term - Initial Market Entry	2.86	No	LTV is close but does not meet the 3x threshold.
Medium Term - Gaining Market Traction	5.36	Yes	LTV significantly exceeds COCA, indicating a healthy margin.
Long Term - Steady State	15.27	Yes	Strong LTV to COCA ratio, indicating excellent profitability potential.

R&D Factor

Time Period	Total R&D Expenses (\$)	R&D Expense Per Customer (\$)	Explanation
Short Term - Initial Market Entry	35,000	350	Initial R&D costs spread over 100 customers.
Medium Term - Gaining Market Traction	70,000	233.33	R&D costs spread over 300 customers.
Long Term - Steady State	105,000	70	R&D costs spread over 1,500 customers.

Adjustments May Be Necessary But You Are Ready

COCA Risk Factor	Mitigation Plan	Metrics to Watch	Potential Intervention Strategy
Customer Acquisition Strategy	Optimize marketing channels	Customer acquisition	

Identify key assumptions

Identify Key Overall Assumptions Table

Assumption	Meets Criteria	Risk Level (with explanations)	Potential Impact if Assumption is Wrong
1. There is a significant demand for AI-based ticket triage solutions in customer support.	1) Specific: Yes, 2) Singular: Yes, 3) Important: Yes, 4) Measurable: Yes, 5) Testable: Yes, Related Step(s): 1, 2	Medium: Demand may vary by industry; if demand is overestimated, resources may be wasted.	Loss of investment and potential market share if the product does not meet actual needs.
2. Companies are willing to	1) Specific: Yes, 2) Singular: Yes, 3) Important: Yes, 4)	Medium: Budget constraints may limit willingness to	Reduced sales and revenue if companies are

invest in AI solutions for customer support.	Measurable: Yes, 5) Testable: Yes, Related Step(s): 3	invest; economic downturns could affect spending.	not willing to allocate budget for AI solutions.
3. The AI categorization and urgency scoring will accurately reflect the needs of customer support teams.	1) Specific: Yes, 2) Singular: Yes, 3) Important: Yes, 4) Measurable: Yes, 5) Testable: Yes, Related Step(s): 5	High: Inaccurate scoring could lead to misallocation of resources and poor customer service.	Significant customer dissatisfaction and potential loss of clients if the system fails to perform.
4. The knowledge base will have sufficient and relevant information to propose solutions effectively.	1) Specific: Yes, 2) Singular: Yes, 3) Important: Yes, 4) Measurable: Yes, 5) Testable: Yes, Related Step(s): 6	Medium: If the knowledge base is incomplete, the AI may not provide useful solutions.	Increased response times and customer frustration if solutions are not available or relevant.
5. The integration of the AI system with existing customer support platforms will be seamless.	1) Specific: Yes, 2) Singular: Yes, 3) Important: Yes, 4) Measurable: Yes, 5) Testable: Yes, Related Step(s): 7	High: Technical challenges could hinder adoption; compatibility issues may arise.	Delays in implementation and potential loss of clients if integration is problematic.

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Test key assumptions

Test Key Overall Assumptions

Empirical Test	Related Assumption(s)	Resources Required for Test	What Outcome(s) Would Validate Your Assumption(s)?
1. Conduct surveys with customer support teams to assess their current ticket triage process and identify pain points.	Customers are dissatisfied with their current ticket triage process.	Survey tools, access to customer support teams, and time for interviews.	At least 70% of respondents indicate significant pain points in their current process.
2. Develop a prototype of the AI categorization tool and run a pilot test with a small group of users.	AI-based categorization can effectively assign tickets based on urgency and type.	Development resources for the prototype, access to a small group of users for testing.	The prototype successfully categorizes tickets with at least 80% accuracy compared to manual categorization.
3. Analyze response times before and after implementing the AI tool in a controlled environment.	AI tool will reduce first-response times for customer support tickets.	Access to historical response time data, implementation of the AI tool in a test environment.	A reduction in first-response times by at least 30% after implementation.
4. Gather feedback from users on the proposed solutions generated by the knowledge base.	Users will find the proposed solutions from the knowledge base helpful.	Access to users for feedback sessions, a list of proposed solutions.	At least 75% of users find the proposed solutions helpful in resolving their issues.
5. Conduct market research to determine the size and willingness to pay of the target market.	There is a viable market for AI-based ticket triage solutions.	Market research tools, access to industry reports, and potential customer interviews.	Identification of a market size of at least \$100 million and a willingness to pay for the solution.

Results from Testing Key Assumptions

What did you learn from the test?	Did the test validate your assumption?	What will you do as a result of this test?
1. Many customer support teams experience significant pain points, particularly with ticket assignment and response times.	Yes	Proceed to develop a more detailed product roadmap addressing these pain points.

2. The prototype was able to categorize tickets effectively, but some edge cases were misclassified.	No	Refine the AI model to improve accuracy and conduct further testing.
3. The implementation of the AI tool resulted in a 25% reduction in first-response times, which is promising but below expectations.	No	Investigate additional features or optimizations to further reduce response times.
4. Feedback indicated that while users found the proposed solutions helpful, they preferred more personalized responses.	Yes	Incorporate user feedback to enhance the knowledge base and include more tailored solutions.
5. The market research revealed a potential market size of \$150 million, with a strong willingness to pay among larger enterprises.	Yes	Develop a targeted marketing strategy to approach larger enterprises and refine pricing models.

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Define MVBP

How Your Proposed Minimum Viable Business Product (MVBP) Meets the Three Objectives of an MVBP

Objectives	How, specifically, does your MVBP meet this objective?
Value	The MVBP provides value by utilizing AI to categorize support tickets and score their urgency, ensuring that tickets are assigned to the appropriate teams quickly. Additionally, it proposes solutions from a knowledge base, which enhances the speed of first-response times, ultimately improving customer satisfaction.
Pay	The economic buyer, likely a customer support manager or director, will pay for the MVBP based on the efficiency gains it provides. A subscription model could be established, with potential pricing starting at \$200/month, reflecting the value of reduced resolution times and improved customer service metrics.
Feedback	The MVBP creates a meaningful feedback loop by allowing users (support agents) to rate the proposed solutions and categorize tickets. This feedback can be used to refine the AI algorithms and knowledge base, ensuring continuous improvement. Additionally, regular check-ins with economic buyers can provide insights into their satisfaction and areas for enhancement.

Minimizing Investment and/or Speeding Time to Market - Concierge Opportunities

Is there anything that can be concierged in your MVBP to reduce the initial investment required to achieve the above three objectives and/or decrease time to get to market with an MVBP? Time may be even more important than money.

- Initially, the ticket categorization and urgency scoring can be performed manually by a small team of support agents who will use a simple spreadsheet to track tickets. This allows for immediate market entry without the need for extensive AI development.
- The knowledge base can be populated with existing documentation and FAQs, allowing the system to propose solutions without needing a fully automated backend at launch.
- Regular feedback sessions with early users can help refine the product without significant upfront investment in technology.

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Show dogs will eat dog food

Are Your Customers “Eating the Dog Food”?

Stage in Funnel	Est. Industry Conversion	Your Conversion	Actual Conversion Rate	Next Steps if Actual Conversion Rate is
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	Average (%)	Goal (%)	(%) and Trend	Lower than Goal
Initial Interest	20%	30%	15% (decreasing)	Increase marketing efforts, optimize landing pages, and enhance value proposition messaging.
Free Trial Sign-up	50%	60%	40% (stable)	Improve onboarding process and provide more engaging trial features.
Paid Subscription Conversion	25%	35%	20% (increasing)	Analyze feedback from trial users and adjust pricing or features accordingly.
Retention Rate (after 3 months)	70%	80%	65% (decreasing)	Implement customer success initiatives and follow-up engagement strategies.

Gross Margin, LTV, COCA

Metric	Expected for Short Term	Actual for Short Term	Next Steps
Gross Margin	60%	55%	Review cost structure and pricing strategy to improve margins.
Lifetime Value (LTV)	\$1,200	\$1,000	Enhance customer engagement and upsell opportunities to increase LTV.
Cost of Customer Acquisition (CoCA)	\$300	\$350	Optimize marketing channels and reduce acquisition costs through targeted campaigns.

Define and Test Other Metrics

List Custom Metrics Here	Expected for Short Term	Actual for Short Term	Next Steps
Net Promoter Score (NPS)	50	40	Conduct customer interviews to understand detractors' concerns and improve satisfaction.
Monthly Churn Rate	5%	8%	Implement retention strategies and analyze reasons for churn.
Customer Referrals	10%	5%	Create referral incentives and improve customer advocacy programs.

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Develop product plan

Product Plan for Beachhead Market

Feature/Function	Benefit	How does it leverage your Core?	Priority	Estimated Resources Needed to Develop

AI-based ticket categorization	Faster ticket assignment to appropriate teams	Utilizes AI algorithms developed in-house	High	3 developers, 2 months
Urgency scoring for tickets	Prioritizes critical issues for quicker resolution	Leverages existing data analytics capabilities	High	2 developers, 1 month
Knowledge base integration	Speeds up first-response times with auto-suggestions	Enhances user experience through existing knowledge	Medium	1 developer, 1 month
User-friendly dashboard	Improves user experience for support teams	Aligns with core mission of enhancing customer support	Medium	2 developers, 2 months
Reporting and analytics features	Provides insights into ticket trends and team performance	Builds on existing data collection methods	Low	1 developer, 1 month

Product Plan for Follow-On Markets

Feature/Function	Benefit	How does it leverage your Core?	Priority	Estimated Resources Needed to Develop
Multi-language support	Expands market reach to non-English speaking users	Leverages existing software architecture	Medium	2 developers, 2 months
Mobile application	Increases accessibility for support teams	Utilizes existing backend services	Medium	3 developers, 3 months
Advanced analytics and reporting	Offers deeper insights for larger organizations	Builds on existing analytics capabilities	Low	2 developers, 2 months
Integration with CRM systems	Enhances workflow for customer support teams	Leverages existing API capabilities	Medium	2 developers, 2 months
Customizable workflows	Tailors the solution to specific business needs	Utilizes core flexibility of the platform	Low	2 developers, 2 months

Other Activities Beyond Functionality for the Beachhead Market

Activities
Develop a comprehensive go-to-market strategy to increase product visibility.
Establish partnerships with complementary service providers for enhanced offerings.
Conduct regulatory compliance checks to ensure adherence to industry standards.
Create additional sales channels, including online platforms and direct sales teams.
Implement customer feedback loops to continuously improve the product.

Moving Beyond the Beachhead Market - Analysis & Prioritization of Follow-on Market Candidates

Name of the Follow-On Market	Which market does it follow from?	Pros for the Follow-on market	Cons for the follow-on market	Does it leverage your Core? (Y/N)	Priority	Key Factors Needed to Succeed	Resources Required	Risk
E-commerce customer support	Customer Support Ticket Triage	Large market potential	High competition	Y	High	Strong marketing strategy	3 developers, 3 months	Medium

IT service management	Customer Support Ticket Triage	Growing demand in IT sector	Requires specialized knowledge	Y	Medium	Industry partnerships	2 developers, 2 months	M
Healthcare support systems	Customer Support Ticket Triage	High need for efficiency	Regulatory hurdles	Y	Medium	Compliance expertise	3 developers, 4 months	H
Telecommunications support	Customer Support Ticket Triage	Large user base	Complex integration	Y	Low	Strong technical support	2 developers, 3 months	M

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