CLG — Investor-Grade Business Plan (Updated)

1. Executive Summary

- CLG (Compliance Licensing Guardian) is an AI-powered SaaS that automates licensing, Joint Commission accreditation, and ongoing compliance for addiction treatment and behavioral health facilities.

- California-first strategy, scaling nationwide.

2. The Problem

- Facilities spend $15K–$20K on consultants for licensing/JC in the first 1–3 years, then $2.5K–$5K per JC survey cycle.

- Compliance errors = shutdowns, lost revenue, staff stress.

3. The Solution

- CLG replaces consultants with five always-on AI Agents:

1. Licensing Agent

2. HR Agent

3. QA/PI Agent

4. Medication/IMS Agent

5. Environment of Care Agent

- Automates binders, logs, corrections, survey prep, and submissions.

4. EMR Integration Strategy

- Integrates with EMRs like Kipu (not competing).

- Pulls staff rosters, MARs, QA/PI data to auto-generate binders and compliance logs.

5. Regulator Connectivity

- DHCS & JC do not offer APIs yet. CLG delivers via:

- Secure automated submission emails.

- Surveyor portal with read-only binders + compliance dashboard.

6. Pricing & Model

- Consultants: $15K–$20K upfront, then $2.5K–$5K per 3 years.

- CLG: $5K setup + $350–$699/month ongoing (all-inclusive).

- Facilities save 50–70% by year 2.

7. 6A) Pricing Reality & Facility Budget Fit

- We acknowledge some consultants undercut compliance at survey prep only ($2.5K–$5K).

- CLG positions as continuous protection + surveyor portal = lower risk, smoother audits.
- Bundled 5-agent system (no upsells).

8. Financial Model
- Year 1: CA pilot → 50 facilities.
- Year 2: 150 facilities.
- Year 3: 400 facilities.
- Break-even Month 6.
- Avg facility spend: $10K–$12K annually.

9. Hiring & Ops Plan
- Year 1: 4 FTE (founder, engineer, compliance SME, sales lead).
- Year 2: Add support + integrations team.
- Year 3: Scale to 20 FTE.

10. Investor Ask
- $250K seed → build v1, EMR integration, launch CA pilot.
- Transparency: platform costs $20K–$25K/year infra + dev, scaling linearly.

11. Risks & Mitigation
- Regulator adoption (no APIs) → mitigated with portal + email.
- Facility budget tightness → all-in-one pricing, no upsells.
- Competition (consultants/EMRs) → first mover as compliance-only AI SaaS.

12. Vision
- First AI agent suite to make compliance proactive, real-time, and affordable.
- California-first, national scale.