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**“We Make Practice Easy”**

## **Chapter 1: Executive Summary**

Using IntelliFunda's Intelli-Apps Mobile Apps Platform, we design comprehensive behavioral mobile tutoring apps. The company is founded by Maria T. Earle, Ed.D and George W. Earle, Serial Entrepreneur. We use our significant intellectual property assets to accelerate our product to market for the benefit of our clients and stakeholders. IntelliFunda is destined to succeed due to its team, quality product development, and use of business intelligence and technology surveillance to stay aware of our competition and innovations in mobile technology. IntelliFunda will be profitable by the end of year 1 and will have a steep increase in sales for the first several years.

IntelliFunda is initially offering three different tutoring apps for middle school students, namely, MathFunda, ReadFunda, WriteFunda, and our customizable tutoring app, YourFunda. The first mobile tutoring app to be designed is MathFunda. MathFunda will help students practice math, easily. MathFunda's features surpasses our competition, is competitively priced, and the client will experience a very low learning curve with customizable features. MathFunda's cost is the same as our closest competitor but surpasses our competitor's features and has been designed to be very easy to use.

### **1.1 Company Objectives**

- Short Term
  - Raise capital
  - Develop Apps
  - Launch professional website
  - Start marketing campaign
  - Complete Pilot Study in the School Districts
- Long Term
  - Entrench by marketing with focus on SMM
  - Forge alliances and affiliations
  - Create a solid profitable company
  - Realize exit strategy

### **1.2 Keys to Success**

As a new company entering the mobile app development industry, the keys to our sustainability and growth are threefold, 1) designing and developing top quality products for an exceptional user experience, 2) increasing brand awareness by ensuring potential clients know about us and like us, and 3) utilize multiple mobile app revenue streams including Freemium to Premium Plus plans and in-app purchases. With a Freemium plan the client will have access to the full-featured app for 15 days, complimentary. With a Premium plan the client will have access to the full-featured app, on a monthly basis. With a Premium Plus plan, the client will have access to additional customizable features. In addition, in-app purchases of additional app features will further allow us to realize revenue. Some of the cost for in-app features will be offset by play coins users receive once they reach tutoring milestones.

### **1.3 Marketing and Sales**

IntelliFunda has conservatively forecasted sales from \$700,000 by the end of year 1, to just over \$2,000,000 by the 5<sup>th</sup> year. Our marketing strategy is to start slow and then build on success. Our two main marketing focuses are driving traffic to our professionally developed website and increasing brand awareness. The first app to be designed is MathFunda which will help students practice math. Our initial target clients are parents of middle school students, throughout the US. Our target end-users are these parents' middle school aged children, who either are struggling in math and need math help, or those who are bored and need a challenge.

## **Chapter 2: Opportunity**

### **Problem and Solution**

#### **Student and Parent Pain Points**

So why develop MathFunda first for middle school students? First, by the time students reach middle school and if they have experienced math failure up that point, they are less motivated to practice math. Their usual sentiment is "It's too hard". In addition, there is a growing concern about US students' low ranking math scores (PISA, 2010). This rank could get worse. With high stakes advancement testing and higher grade level mathematics curriculum being pushed down to the lower grades, our kids are struggling, failing. What are parents to do? More and more, parents are turning to driving their children to expensive tutors often in the evening after a long day's work. In the category single head-of-household, these parents are women (US Dept. of Commerce, 2011). The percentage of working women with children under 18 years of age is 70% (InnovateHERFlyer2016, 2015). And finally, 74% of employed women work full time (InnovateHERFlyer2016, 2015). The result → exhausted moms driving their kids to expensive tutors using the sparse funds they have.

#### **Gap in Comprehensive Mobile Tutoring Apps**

An opportunity also exists due to the lack of comprehensive tutoring offerings. To determine competition, a search for mathematics tutoring apps took place in my distribution channels, namely the App stores. A variety of Math apps returned, however many are what I call utility apps, such as calculators, graphing sheets, flash cards, etc. Very few apps returned that could compare with the comprehensive features offered by MathFunda:

#### **Mobile Tutoring Environment**

- Handheld mobile tutoring
- Customizable audible Digital Tutor
- Subject Matter Assessment
  - Affective Assessment
  - Aptitude Assessment
- Automatically Generated Tutoring Trajectory Based on Developmental Assessments
  - Review through Challenge Problems: Basic Math, Algebra, Probability and Statistics, and Geometry
- Problem Solving Help

- Conceptual Help
  - Mathematics literacy
  - Big Idea Math Videos
  - Gamification- Virtual Badges
  - Peer-to-peer collaboration
- Procedural Help
  - Step-by-step Solutions
  - Most common errors
- Monitoring
  - Performance Monitoring
  - Behavioral Monitoring
  - Dynamic Monitoring of Learner Struggles
  - Dynamic Monitoring of Learner Progress
- Visually Appealing Progress Reports
- Customizable Reward System
- No travel
- No Class time interruption
- Low learning curve
- Math utilities such as math calculators and graphing tools and flash cards

Others in my specific marketplace were either not as feature-filled, not student-centered mobile tutoring, or not for-profit, such as Kahn Academy (who by the way has given IntelliFunda conditional use of their Math videos in MathFunda). Yet others were geared towards teaching, not tutoring. While both tutors and teachers help a student master material, teaching apps are more focused on using a standardized curriculum and instructional strategies to teach; tutoring apps step in when students need additional help and practice. IntelliFunda develops comprehensive behavioral tutoring apps for on-the-go tutoring.

These pain points and this tutoring app lack presents a massive market opportunity with all middle school math students in the US.

### **Solution:** Products and Services

MathFunda uses a 3 pronged approach to help increase student's enjoyment of math practice and make it easy to practice math, anytime, anywhere.

- Math practice handheld mobile device
- Math practice is facilitated by a customizable encouraging Digital Tutor that keeps students aware of their progress against their automatically generated tailored tutoring trajectory.
- Student receive various milestone rewards, multi-modally.
- A visually stunning progress reporting system based on individual students' effort

Due to the multimodal abilities of mobile devices, students can choose their reward mechanism based on their learning style. For instance a visual learner may choose to see jumping gold stars on the screen when they reach a milestone. Aural learner could choose to hear clanging cymbals. And even tactile learners learning style is addressed. Upon reaching a milestone or game play level, the tactile learner could choose to receive a tactile recognition method – a handshake, literally.

Use of MathFunda for mathematics tutoring will address parents' pain points by:

- Significantly lowering tutoring costs
- Due to the mobile nature of the app, the parent can be less mobile

### **Chapter 3: Marketing and Sales**

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Our apps must perform as well as they look, and the way they are marketed must awaken the interest of clients. Our Search Engine Optimization methods (SEO) will optimize our website for search engines, for instance with SEO tags and our bold and vivid Social Media Marketing (SMM) strategy will optimize business growth via client/end-user social networks such as Facebook, Twitter, Pinterest, Instagram, Google+. We will build a synergy between our products and the platforms where they can be obtained, namely the iTunes App Store, Google Play, Windows Store, and any other digital distribution outlets we can enter. Through the quality of our development and our keen SMM, our apps will stand out in the electronic marketplaces

The first app to be designed is MathFunda which will help students practice math. Our initial target clients are parents of middle school students, throughout the US. Our target end-users are these parents' middle school aged children, who either are struggling in math and need math help, or those who are bored and need a challenge.

#### **First Year Milestones:**

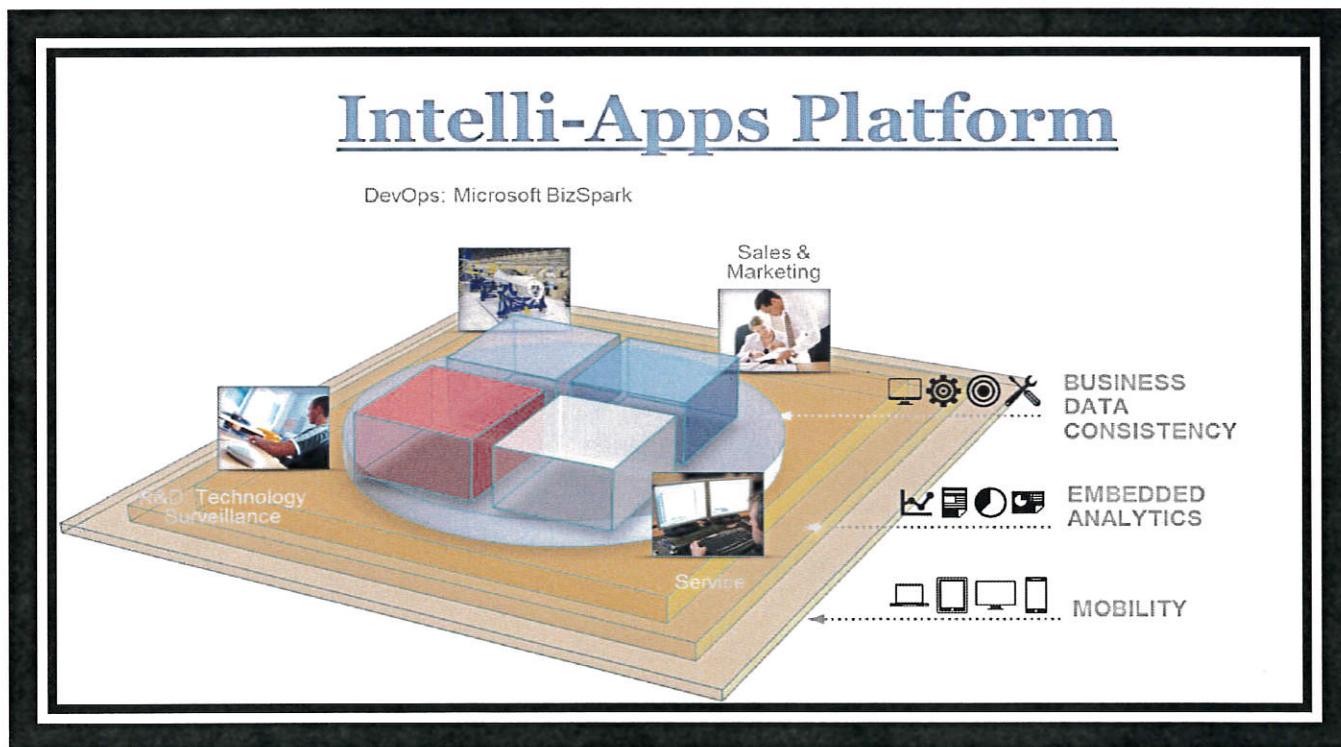
- |                                       |                   |
|---------------------------------------|-------------------|
| ➤ Programming Sprints Begin           | November 30, 2015 |
| ➤ Prototype ready for Focus Group     | February 15, 2016 |
| ➤ Final product ready for Pilot study | April 07, 2016    |

- Students continue MathFunda Free Use      Summer 2016
- MathFunda distributed to App Stores      August 01, 2016
- Students convert Freemium to Premium      August 30, 2016

## Chapter 4: Company

Our approach to business can be summed up by a simple philosophy: To develop captivating mobile tutoring apps that clients will appreciate as being interesting, enjoyable, effective, and easy to use. Our development process will inject quality while at the same time paying attention to strategies that will enable us to generate more income from clients. We will only listen to the market and to our target clients and clients when it comes to development.

Our mobile app development strategy involves the combination of innovative cloud-based platforms to form IntelliFunda's Intelli-Apps DevOps platform consisting of components of Microsoft's BizSpark along with components of IBM's BlueMix; Industry sized CRM; Business Data Consistency Tools, and Embedded Analytics.



Our firm relies on the experience and skills of our programmers, developers and testers. A great portion of our work entails the creation process, but we also do quite a bit of market research and conduct interviews with clients and peers so that we can always get an edge over our competitors with regard to developing apps that smartphone and tablet users will want to install in their devices. Our SMM and traditional marketing techniques will give us the upper hand in terms of being located by clients, and the engagement will ensure that they pay-per-download or

install our apps on a freemium basis. Once we appeal to clients, they will become loyal customers who are more likely to respond to converting to a premium subscription, in-app advertising, and in-app purchases.

#### **4.1 Start Up and Technology**

We intend to run a streamlined operation with little need for purchasing large assets. The intellectual property of our management team will be the largest asset we bring to the table. Cash sufficient to carry the operation will be founder-funded. The majority of costs for DevOps will be provided complimentary during the first year of development, thanks to acceptance into Microsoft's BizSpark's cloud based DevOps program and IBM's BlueMix cloud development offerings. We will need to rely on the latest technology to deliver our business model, but at the same time we will keep an eye on which mobile devices are still relevant on the market. Part of our SMM is to reach out to clients who enjoy a previous-generation model that they just cannot let go of. By developing on occasion with this particular segment in mind, we will conquer the hearts and minds of clients who will appreciate that we still think about them and want to keep their old mobile devices relevant with new apps. A major part of our success will be to use responsive Web design and adaptive development to deploy our SMM strategy. Our online marketing materials will be visually appealing on desktops, laptops, smartphones, and tablets alike.

#### **4.2 Services & Products**

Our commitment is to develop apps that elicit a "wow!" factor from our clients. This means developing cutting edge apps that take full advantage of mobile technology. Although we will pay attention to the latest versions and upgrades of the major operating systems such as iOS, Android, Windows Phone, BlackBerry, etc., we will not ignore the up-an-coming minority segments such as the Firefox and Ubuntu mobile devices.

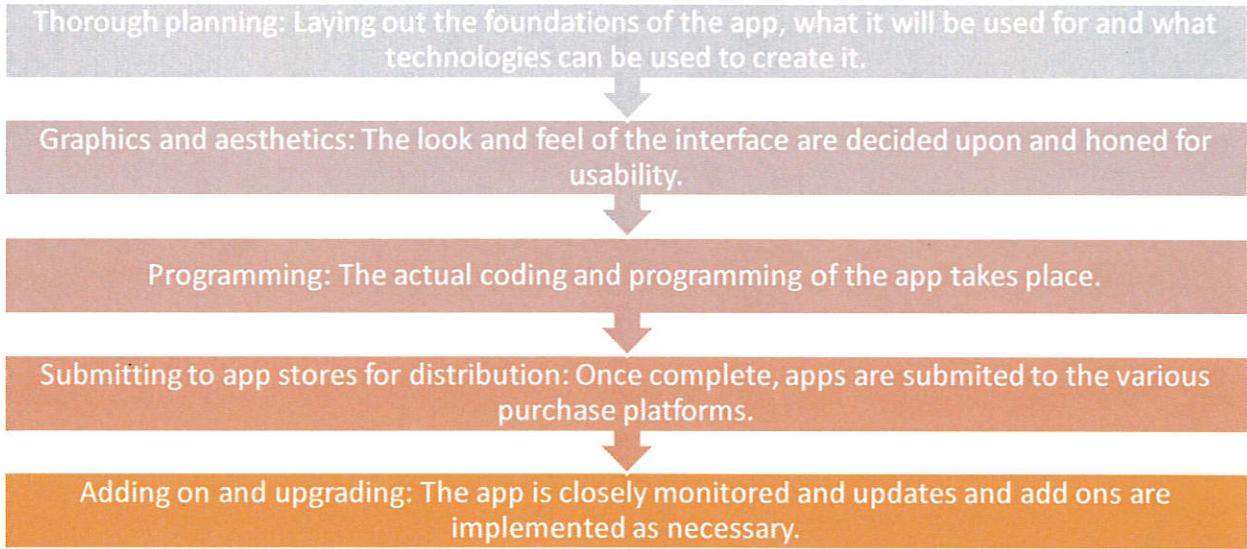
To achieve our objectives, we have outlined the following three main strategic goals:

- Develop high-quality apps that are functional and effective
- Keep abreast of new developments in our industry
- Keep abreast of new developments with regard to app distribution channels.

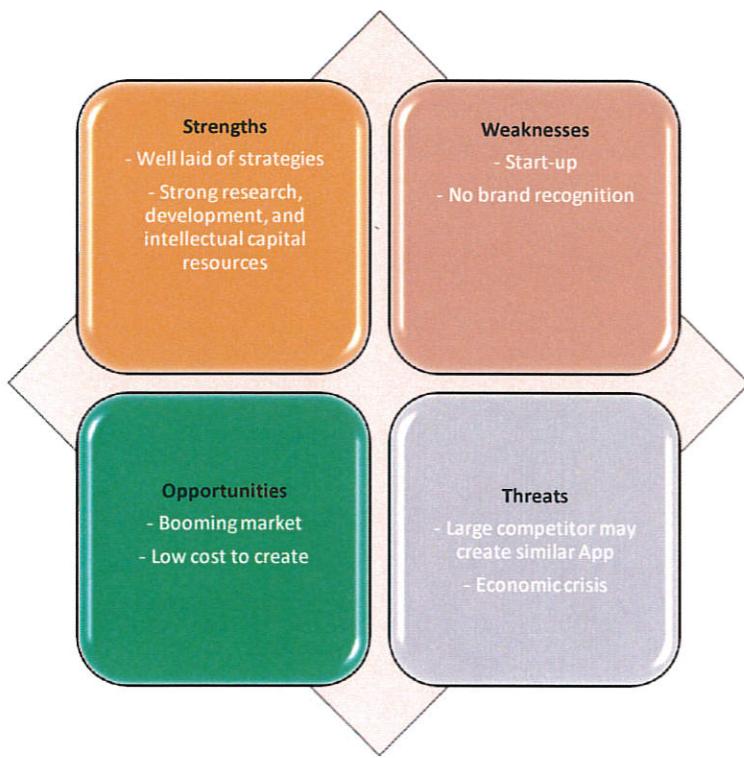
#### **4.5 Strategy and Implementation**

A major part of our SMM strategy will consist of professional developed website. We will have a main website for our company, but each app we develop may require its own site. Unlike other companies that solely rely on the mobile app marketplaces as their sole Internet presence; each of our apps will require its own social media profile. In fact, some of our products may develop on the strength of a specific social media network's application programming interface (API) such as Instagram or Pinterest; when this is the case, we will make sure that we have a strong presence on that social network.

#### **4.6 Developing our Apps Entails**



## SWOT



## Team

Name	Specialty	How Supports
<b>Management</b>		
<b>Maria T. Earle, Ed. D</b>	<b>Founder</b>	<b>Manage company, SCRUM</b>
<b>George W. Earle</b>	<b>Serial Entrepreneur</b>	<b>Oversee Operations and Sales</b>
<b>Jerry McClendon</b>	<b>Schools Specialist</b>	<b>Engage with School Districts</b>
<b>Trio of Programming Gurus</b>		
<b>Dainis Boumber</b>	<b>Speech Patterns</b>	<b>Digital Tutor Engage</b>
<b>Oscar Gomez</b>	<b>App Development</b>	<b>Consults on app DevOP</b>
<b>Sourajit Guhu</b>	<b>Full Stack Programmer</b>	<b>Advise on full program</b>
<b>Advisory Board</b>		
<b>Dr. Qui, Ph.D.</b>	<b>Ass. SW Eng. Prof</b>	<b>Full software lifecycle</b>
<b>Dr. Nicole Russell, Ph.D.</b>	<b>Ass. Mathematics Prof</b>	<b>Advise on MathFunda</b>
<b>Collaborators</b>		
<b>Dr. Spinks-Franklin, MD</b>	<b>Developmental-Behavioral Advise</b>	<b>ADHD/Math Pilot Study</b>
<b>IBM BlueMix Entrepreneur Program</b>	<b>DevOps</b>	<b>Watson, MongoDB</b>

**Microsoft BizSpark Entrepreneur Program**

**DevOps**

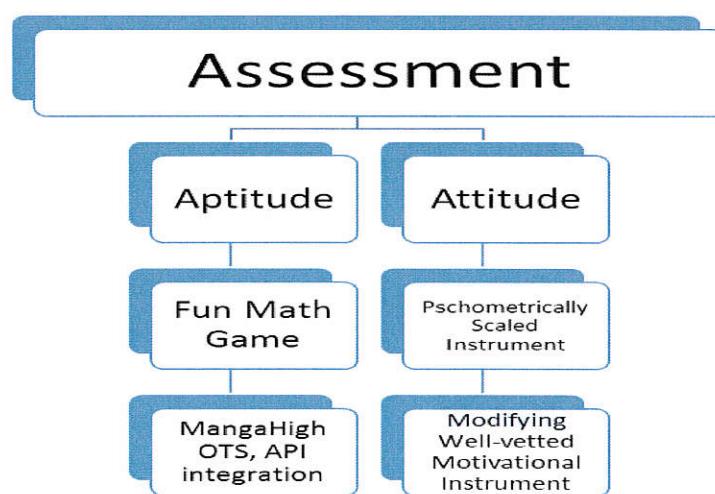
**Visual Studio, SCRUM**

## Component Analysis

Each IntelliFunda app consists of three major components, Assessment, Tailored Tutoring, and Reward and Reporting.

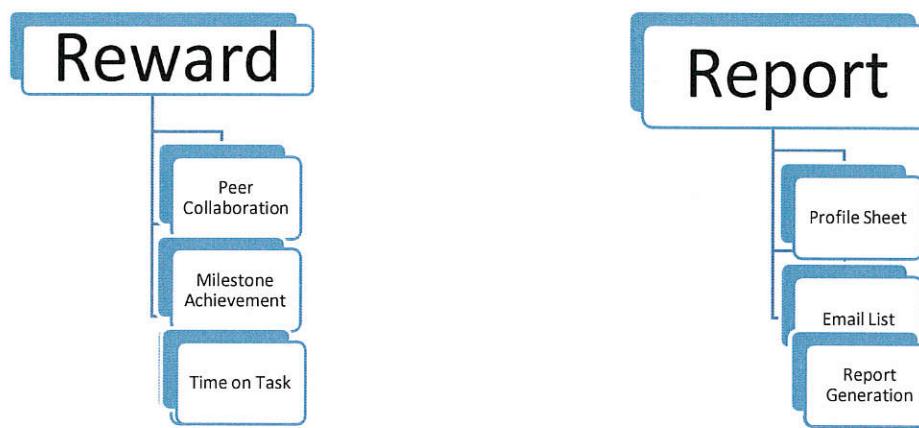
### Assessment to automatically generate student's Tailored Tutoring Trajectory (TTT)

Intellifunda takes a more holistic approach to student assessment. Initially, clients will complete a one-time assessment. They will be assessed for not only their subject matter aptitude level but also their attitude or motivation towards mathematics engagement. The results of this assessment will be used to automatically generate the students' Tailored Tutoring Trajectory (TTT). Their subject matter aptitude level will be determined by the results of playing a fun math game, provided by Manga High. Their motivational level will be assessed by a well vetted, psychometrically scaled motivation instrument with permission use granted from Dr. Martin, University of North Texas. As a doctoral student, the founder developed a psychometrically scaled instrument under the guidance of her esteemed professor, Dr. Ronald Frankiewicz, Professor Emeritus of Psychological, Health, and Learning Sciences at the University of Houston, and is in the process of making modifications to the instrument for the current population.



## Reward and Report System

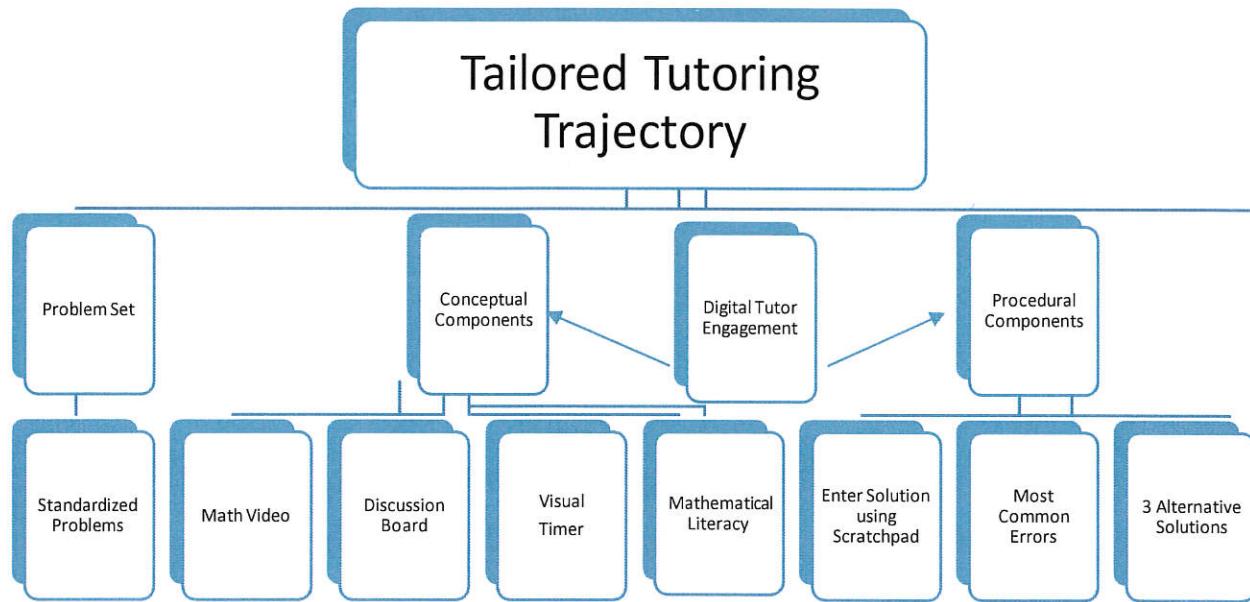
And Finally, Reward and Reporting components. A mandatory requirement of app use is to set up milestone goals. Just about every aspect of MathFunda tutoring engagement can be customized for student reward. Learning through rewards is better and longer lasting than learning through pain. A few highlights include milestone achievement, time on task, completing sequence of problem solving tasks, and collaborating with peers on the discussion board. Rewards can manifest as badges, points, play coins and multi-modally, i.e. sound, visual, or tactile. Visually appealing, easy to read reports will be viewable on the mobile device. Students email list, assessment data, effort data, and milestone achievements will be utilized to create reports.



### Tailored Tutoring Trajectory (TTT) used to determine conceptual and procedural tutoring

The TTT resulting from the initial assessment will be used to offer students solve standardized mathematics problems, at their developmental level. When a student problem solves, on their level, they get to see what they already know, which could be motivating in and of itself. With mastery of each level, student is reassessed and advanced to next level.

For conceptual help, students will have access to Math videos, thanks to Kahn Academy, Mathematical literacy help, and a peer discussion board. For procedural help, first the student will have the opportunity to enter the solution to the math problem using our built-in scratchpad. Then, if their solution is incorrect, we display 3 alternative ways to solve the problem. We also show up to three most common errors when trying to solve a particular type of problem. We also know that what we have provided as a solution set could be lacking. Thus we considered an additional avenue for students to enter their way of solving the problem. This way they get to teach us. All procedural and conceptual help is facilitated by their customizable Digital Tutor. Their DT will engage with them based on their motivational level and offer encouraging advice, help keep focused, and aware of time constraints. When math practice is done in the privacy of their home, there is no fear of peer retribution. Moreover, when one is in a place of safety and security their mind becomes more peaceful, free to learn, free to excel.



## Chapter 5: Financial Plan

Before discussing MathFund costs, a few reminders:

- Average cost for Math Tutor >> \$65 per HOUR, nationally
- Elite Math Tutor >> \$400 per HOUR, in elite communities
- Addition Travel Costs

MathFund costs will range from \$0 to a Premium subscription cost:

- \$9.99 per MONTH
- No Travel Costs

To discuss gross revenue we will project revenue from one of our marketing campaigns – Pilot Study in the School District. In one school district, 5,400 students will have the opportunity to download MathFund, at the Freemium level. We will project that a modest 10% of this potential client population, or 540 students, will convert from Freemium to Premium subscription in August, 2016. We now project that due to our aggressive SEO/SEA campaigns in an additional 9 school districts throughout the country with similar potential client populations.

- August 2016
  - Premium MathFund available in App Store from Freemium at \$0 for 15 days to Premium at \$25/Month
- August 2017
  - Projected Gross Revenue from one Middle School District in TX - 540 clients paying \$10/month for 1 year
    - $\$10 \times 540 \times 12 = \$64,800$  / year.
  - Will offer summer incentives
  - Now project similar numbers of clients in other 9 school districts.
    - >> \$648, 000 / year.
    - Additional revenue will come from in-app purchases.
  - Thus, total Projected Gross revenue after first year in app store
    - >> \$700,000

Reminder: This first year gross revenue is based on only one of our planned campaigns. We expect our other four campaigns to also bring in review; however it is difficult to predict at this time. Over a 5-year timeframe we will introduce one new app to the marketplace.

	Year 0 - 2016	Year 1 - 2017	Year 2 - 2018	Year 3 - 2019	Year 4 - 2020	Year 5 - 2021
<b>Math Funda - MS</b>		7 o o k				
MathFund-a-MS; ReadFunda			700k; 300k			
MathFund-a-MS; ReadFunda; WriteFunda				7 o o k ; 3 o o k ; 2 o o k		
MathFund-a-MS; ReadFunda; WriteFunda;					7 o o k ;	
<b>Math Funda - HS</b>					3 o o k ;	
					2 o o k ;	
					5 o o k	
MathFund-a-MS; ReadFunda; WriteFunda;						7 o o k ;
<b>Math Funda - HS</b>						3 o o k ;
<b>Your Funda</b>						2 o o k ;
						5 o o k ;
						3 o o k

**Total Gross Revenue    F r o m   \$ 7 0 0 , 0 0 0   t o   \$ 2 , 0 0 0 , 0 0 0   b y   Y e a r   5**

## IntelliFunda's 5 Year Projected Growth - Gross Revenue



### **Cost to Obtain Client during Year 1**

DevOps Cost will be complimentary for 3 years with Microsoft's BizSpark development platform. Once the digital tutor dialogue has been analyzed and developed after the first year for MathFunda, we will no longer need IBM's BlueMix Watson Alchemy platform. Our in-resident speech pattern computer scientist will take over such developments

- Microsoft BizSpark Entrepreneur Program (3 years of credit)
  - Servers - Cloud Based
  - Software development tools (Visual Studio, TFS)
  - Variety of Business and Program Development Tools such as Skype for Business
- IBM Blue Mix Global Entrepreneur Program (1 year of credit)
  - Servers – Cloud Based
  - Watson Alchemy Language
  - MongoDB
- Pilot Study Cost - \$1200
  
- \$50 Amazon gift certificate for teacher, \$1,000
- Travel/gas for pilot study, \$200

- Snacks for Counselor/Teacher Seminar, \$100

#### Programmers Cost

- Programmers (4), Equity (negotiating)
- Interns, no cost; as part of their internship they are not allowed to be paid

Cost to sell in App Stores: 10 - 30% of sales plus onetime fee

#### Google play

- Apple, Google, SlideME

Social Media: \$1500

- LinkedIn and Website Review, \$500
- Professional Website being Designed, \$1000.00

### **Seed Funding/Exit Strategy**

The tutoring industry falls under SageWorks category Exam prep and Tutoring, #611691. In the last 5 years this industry's current ratio shows a very healthy 4.93 and gross profits of 80.89%. Tutoring revenues were as high as \$7 billion as of 2007 (EduVentures, 2013). A strong demand for academic counseling and tutoring services continued in 2013 as top students faced an increasingly competitive environment for college admission. Spending on tutoring services was increasing at more than 5% annually (EIA, 2013). As discussed earlier, Mathematics tutors can command upwards of \$65 per hour on average nationally and for elite private tutoring sessions, upwards of \$400 per hour.

In lieu of equity stakes in the company we are looking for seed funding to pay salary + equity to our programmers. Funding would also be used for PR and marketing. It is at the 5 year mark in 2020 where we will consider executing our Exit Strategy. We will entertain partners who have larger distribution channels. Finally, a trademark registration has been submitted to the United States Patent and Trademark Office for our tag line, which we brainstormed heavily about

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