# Data Infrastructure & CRM Core

## Overview

Axiom is designed to revolutionize software consultancy operations by addressing inefficiencies in project scoping, resourcing, and execution. By leveraging AI-driven automation, Axiom transforms scattered project data into structured, actionable insights, enabling consultancies to streamline development, optimize costs, and scale effectively.

### Phase 1: Foundation—Data Infrastructure & CRM Core

### 1.1 Client & Lead Management (CRM Basics)

I. Develop functionality to add and manage client and prospect profiles.
II. Implement a system for attaching notes, meeting transcripts, files, and contacts to each client record.
III. Enable client status tracking with the following lifecycle: Lead → Prospect → Active → Archived.
IV. Create a Kanban-style or list-based pipeline view for tracking sales and account progress.

### 1.2 Employee & Cost Tracking

I. Build an employee management module to track roles, skills, availability, and cost per hour/day.
II. Develop tools for tracking SaaS, cloud, and operational overhead costs.
III. Implement real-time visualization of team operating costs to support budget estimation and forecasting.

### 1.3 Project Directory & Documentation Store

I. Create a project directory where projects are managed under specific clients.
II. Implement a centralized storage system for documents, meeting transcripts, Loom videos, call notes, and other project assets.
III. Enable tag-based search and smart filters for efficient retrieval of files and notes.

### Phase 2: Project Intelligence—Scoping, Estimation & Timeline Modelling

### 2.1 Scope Ingestion & Analysis

I. Enable uploads of transcripts, briefs, and project documents.
II. Develop AI-powered parsing to identify and highlight key features, deliverables, and constraints.
III. Implement semantic tagging and auto-linking to reference materials for streamlined project understanding.

### 2.2 Time & Cost Estimation Engine

I. Build an AI-driven estimation model to map features to time and resource requirements based on:
    A. Employee rates and availability.
    B. SaaS/deployment stack.
    C. Historical project data (as it accumulates).
II. Generate best-case, average, and worst-case projections for delivery timelines and costs.

### 2.3 AI-Suggested Team Formation

I. Develop an AI-driven recommendation system for optimal team composition based on:
    A. Skill match.
    B. Availability.
    C. Cost optimization.
    D. Prior project experience.

## Phase 3: Workflow Automation—Tickets, Planning & Developer Tools

### 3.1 Ticket Generation & Linear Integration

I. Automate the breakdown of scoped features into individual development tickets.
II. Assign estimated time per ticket and prioritize work based on dependencies.
III. Integrate with Linear, Jira, or other project management tools to sync updates and track ticket progress.
IV. Monitor ticket velocity and allow for dynamic adjustment of estimates based on real-time progress.

### 3.2 AI-Generated Code & PRs (Optional Phase Alpha)

I. Provide structured implementation details within each ticket, including references to relevant documentation, dependencies, and architectural guidelines.
II. Offer an optional AI-assisted code generation feature to handle repetitive boilerplate work (e.g., setting up API endpoints, database models, or UI components).
III. Ensure all generated code is clearly documented, tested, and ready for human review before merging.
IV. Maintain developer autonomy by treating automation as a support tool, not a replacement for engineering expertise.

### 3.3 Delivery & Feedback Tracking

I. Attach deadlines and delivery goals to project milestones.
II. Monitor slippage and blockers in project timelines.
III. Implement a client feedback loop for collecting satisfaction and retrospective notes.

## Phase 4: Scale & Intelligence Layer

### 4.1 Reporting Dashboards

I. Implement analytics tools to track project profitability, time utilization per employee, and cost efficiency.
II. Provide sales pipeline conversion tracking and revenue forecasting to support business growth.
III. Enable real-time data visualization for decision-making at both project and company levels.

### 4.2 Knowledge Graph & Smart Querying

I. Build a cross-linked knowledge graph that connects projects, employees, clients, and reusable components.
II. Develop a query system to answer contextual questions such as:
    A. *"Which engineer worked on the last fintech React Native app?"*
III. Utilize accumulated project data to continuously improve estimates and team recommendations.

### 4.3 Marketplace & Internal Templates

I. Create a template marketplace where agencies can publish and reuse common project scopes, AI prompts, and workflows.
II. Standardize onboarding and setup per industry vertical (e.g., fintech, marketplaces, B2B SaaS).
III. Encourage knowledge sharing and best practices to reduce redundant scoping efforts across similar projects.