EDU-Copilot

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Executive Summary

EDU-Copilot is shaping the future of student support in higher education. We offer an AI-powered platform that helps students effectively navigate their academic and early professional journeys, from initial planning and course selection to career discovery, skill development, and financial aid. We solve inefficiencies and inadequacies in traditional university advising by using cutting edge AI to give tailored and comprehensive counsel. Today's higher education landscape presents considerable obstacles. Students frequently lack proper supervision, and large advisor caseloads limit customized help, while students increasingly want integrated academic planning job preparation, and more access to financial aid. This creates a substantial market need within the rapidly growing US Higher Education EdTech sector. Furthermore, recent advancements in AI, enhancing reliability and conversational capabilities, present an opportunity to build a truly effective and trustworthy guidance tool that traditional methods cannot match.

Our platform provides a comprehensive set of tools supplied through a user-friendly web interface. AI-personalized planning guides students through course selection, major exploration, and 4+ year academic scheduling based on their goals and institutional requirements. We offer comprehensive career route exploration, which connects academic choices with probable job outcomes and market trends. Our scholarship search is a significant component that assists students in discovering relevant financial assistance, simplifying an important portion of affording their education. With our AI chatbot we provide rapid responses to often asked questions. A unique differentiator, particularly for our direct-to-student offering, is our AI document parsing capability. Users can easily upload transcripts, degree requirements, and course catalogs, which our AI intelligently parses to establish a basis and foundation for the students' assistance. We differentiate through this comprehensive feature set, the seamless user experience enabled by our AI parsing technology, and our commitment to leveraging cutting-edge AI for reliable and nuanced guidance.

EDU-Copilot provides serious value to various stakeholders. We help students gain clarity, confidence, and efficiency in regards to managing their academic journey. We provide colleges with a strong tool to improve student retention, advisor efficiency, completion rates, and acquire helpful data into student needs and progression. While competitors range from Student Information Systems modules to specialized solutions, Our competitive advantage stems from comprehensive integration of academic planning, career assistance, and financial assistance, all powered by advanced AI. Our multi-stream business model, including a direct-to-student freemium offering, also allows for direct engagement and fosters a valuable user base.

Our go-to-market strategy has multiple aspects. We acquire student users directly through digital marketing and campus outreach for our freemium platform. Revenue comes from offering subscriptions for premium features. We will engage universities through a B2B sales process, emphasizing demonstrable ROI in student success metrics and operational efficiency through university licenses. At the same time, we will develop strategic partnerships with employer-focused and skill-focused platforms such as Linkedin and Kahn Academy to bridge

the gap between education and employment opportunities for our users. Advertising revenue from our free user base serves as a supplementary stream. We implement it carefully to maintain user trust, but also encourage premium sign ups. We project significant user growth across both B2C and B2B segments, driven by the clear need for our solution. Our multi-stream revenue model provides diversification, and we aim to become profitable within 15 months by scaling our user base and effectively monetizing across our different streams, while carefully managing operational costs, particularly AI processing expenses.
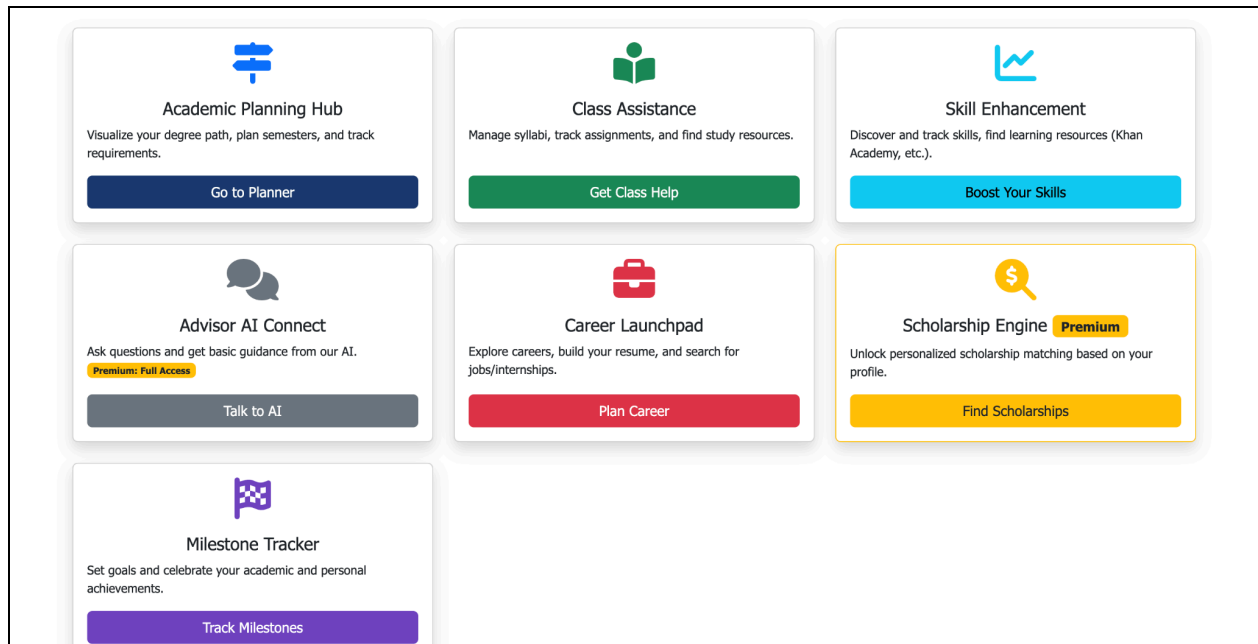
To accelerate product development, scale user acquisition, build out our B2B sales function, and reach profitability, EDU-Copilot is seeking $2 million in pre-seed funding. EDU-Copilot is poised to make a significant impact by providing the personalized, comprehensive support students need to thrive in higher education and beyond.

Product & Service Plan

EDU-Copilot is an online platform that utilizes artificial intelligence to create personalized and efficient academic and career advising to students. In comparison to the traditional academic advisors, our platform allows students to receive personalized advising at any time and in any place, adding convenience and accessibility to their academic and career paths.
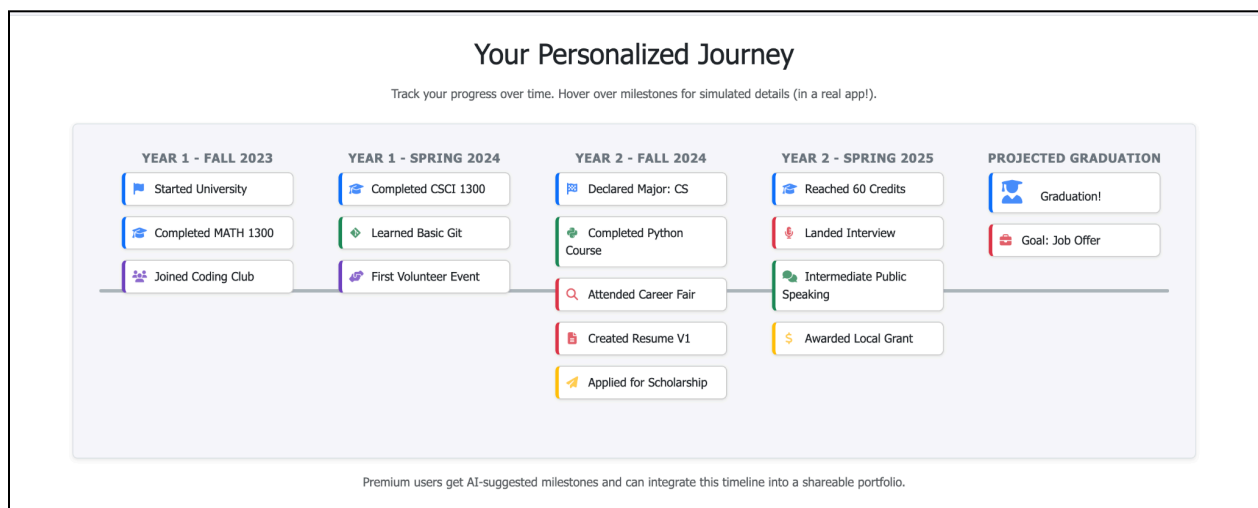
Key Features

- Artificial Intelligence: EDU-Copilot allows students to enter their own information via document upload, such as: academic records, fields of interest, skills, and career goals. Through artificial intelligence, the platform will then match students to the most ideal course track and connect them with potential internship opportunities.
- Performance: Through our website, students are able to receive academic advising quickly and efficiently. Our servers are designed to hold a large scale of data and analyze it to cater the needs of students.
- Consolidation: Our system combines numerous academic and professional resources into a single platform, which allows both students and educational centers to simplify and modernize their academic advising strategies.

Academic Planning Hub
Visualize your degree path, plan semesters, and track requirements.
Go to Planner

Class Assistance
Manage syllabi, track assignments, and find study resources.
Get Class Help

Skill Enhancement
Discover and track skills, find learning resources (Khan Academy, etc.).
Boost Your Skills

Advisor AI Connect
Ask questions and get basic guidance from our AI.
Premium: Full Access
Talk to AI

Career Launchpad
Explore careers, build your resume, and search for jobs/internships.
Plan Career

Scholarship Engine Premium
Unlock personalized scholarship matching based on your profile.
Find Scholarships

Milestone Tracker
Set goals and celebrate your academic and personal achievements.
Track Milestones

Benefits

- Cost Reduction: For universities and other educational centers, EDU-Copilot will remove the costs of traditional advisors' salaries.
- Accessibility and Convenience: The online platform is designed in a manner that students are able to easily navigate, and the artificial-intelligence does the heavy lifting in terms of generating their academic advice. Additionally, the site is accessible from any location and at any time, allowing for progress to be made beyond the campus and between semesters.
- Academic Growth: The AI-curated recommendations derived from students' real data will improve student performance by enhancing course paths and job opportunities. This combination creates higher graduation rates and better post-graduate outcomes.

Your Personalized Journey

Track your progress over time. Hover over milestones for simulated details (in a real app!).

YEAR 1 - FALL 2023	YEAR 1 - SPRING 2024	YEAR 2 - FALL 2024	YEAR 2 - SPRING 2025	PROJECTED GRADUATION
Started University	Completed CSCI 1300	Declared Major: CS	Reached 60 Credits	Graduation!
Completed MATH 1300	Learned Basic Git	Completed Python Course	Landed Interview	Goal: Job Offer
Joined Coding Club	First Volunteer Event	Attended Career Fair	Intermediate Public Speaking	
		Created Resume V1	Awarded Local Grant	
		Applied for Scholarship		

Premium users get AI-suggested milestones and can integrate this timeline into a shareable portfolio.

Customer Experience

Students find EDU-Copilot's platform to be more efficient than the traditional advising experience. They also find the career browsing features to be more meaningful than what is received from current advisors. The design ensures easy use and a quick generation of results, minimizing academic stress.

Universities and other institutions that utilize our service experience an easy integration of data and significant budget reductions long-term. This allows for a stress-free transition and the allocation of financial resources to other matters.

Competitive Landscape

There are a few notable competitors in the realm of artificial-intelligence academic advising, one of them being Advisor.AI. EDU-Copilot sets itself apart from this competitor by providing a wider variety of subscriptions. Advisor.AI connects only with universities, while our service can be used by individual students regardless of whether or not their school uses our platform. Additionally, EDU-Copilot provides opportunities to connect with employers, allowing for success beyond education. This allows us to have larger reach and accessibility than our competitor: joinadvisorai.com

Industry Challenges

The current state of academic advising faces one major challenge to address: the high ratio of students-to-advisors. For example, at the University of Colorado Boulder, some colleges have as high as a 625:1 ratio. Our service offers a solution to this challenge by removing the need for a traditional advisor and providing personalized experiences to each student, something that is not efficiently obtainable in the current state of academic advising. (https://www.dailycamera.com/2019/06/03/cu-boulder-committee-recommends-adding-advisors-to-boost-student-success/) .

The educational technology industry currently faces challenges in how it is perceived. Some educators and their institutions are reluctant to integrate modern technology into their systems. By communicating directly with institutions and students , we can build a level of trust that can change this perspective on educational technologies.

Customer Relationship Aspects

EDU-Copilot will maintain positive relationships with users by:

- Personal Assistance Offered: EDU-Copilot representatives will be available to foster relationships and provide any assistance in ensuring our services meet the needs of institutions, through face to face .
- Referral Program: Individual student account holders will be able to refer fellow students to use our service, which in return will reward them with access to premium features and increase positive attitudes towards our site.

- **Self-Service:** Users will be able to utilize the services without ever having to interact with anyone, making it easier for them to work around their own schedule while still being able to receive meaningful academic support.

The use of artificial intelligence allows EDU-Copilot to revolutionize academic advising through personalization, efficiency, and flexibility, key components that are often missed in traditional advising.

Market and Industry Analysis

Market Analysis

Overall Market Description

The education technology (EdTech) market is changing exponentially, driven by increasing demand for personalized learning solutions, scalable support services, and improved student outcomes. Within this broader context, the category of academic advising and career planning remains substantially underserved, especially in large institutions where student-to-advisor ratios are overwhelming, and many students report feeling lost or unsupported in their academic and career journeys.

In the US, a primary launch market, the EdTech sector is projected to grow from $187 billion in 2025 to $287.8 billion by 2029, according to Technavio. The country's strong digital infrastructure, increasing higher education enrollment, and nationwide initiatives for enhancing student retention and graduation rates form the foundation of this growth. These trends are fertile soil for AI-powered solutions like EDU-Copilot.

Addressable Market

While the overall EdTech market is sizable, EDU-Copilot targets the advising and planning segment in particular. Our addressable market includes:

- **Students**, particularly those at large universities, online programs, or underserved populations, who seek accessible, personalized, and always-available advising tools.
- **Educational institutions**, which struggle with advisor shortages and need scalable solutions to enhance student guidance, retention, and success metrics.
- **Employers**, who seek career-aligned students for recruitment and value early pipeline access.
- **Advertisers**, who can reach an engaged and focused audience through EDU-Copilot's freemium tier.

The advising gap is severe. The typical advisor, according to NACADA, supports 375 students, with some schools facing student-to-advisor ratios of up to 1,000:1. This imbalance highlights a strong market pull for scalable, AI-first platforms.

Customer Segments and Buying Behavior

- **Students** are driven by convenience, autonomy, and on-demand support. Their adoption is influenced by word-of-mouth, social media, app store visibility, and endorsements from academic peers or institutions.
- **Institutions** prioritize operational efficiency, retention outcomes, and compliance. Their purchase decisions are typically made by Deans, CIOs, or Directors of Student Success, often following an RFP or pilot evaluation.
- **Employers** look for data-rich insights and early engagement tools for high-potential candidates aligned with their skill needs.
- **Advertisers** target engagement and niche alignment, making a focused student user base attractive.

Primary research, including interviews with students at the University of Colorado Boulder, revealed widespread dissatisfaction with traditional advising services, particularly their limited availability, generalized feedback, and lack of integration with career planning. Students also mentioned a lack of personal connection with their advisors, as well as missed opportunities due to a lack of strong academic advising support. This validates a clear and addressable market opportunity.

Industry Analysis

Industry Structure
The academic advising tech landscape is fragmented and evolving. Traditional student information systems (SIS) provide static degree audits, while newer EdTech startups often offer point solutions, with each addressing only a portion of the advising journey. Institutions struggle with patchwork systems that lack real-time intelligence or personalized insights.

An industry interview with a co-founder of Input 1, a firm that developed early insurance software, highlighted critical lessons relevant to our space. He shared that finding the "middle ground" of your target market dictates a lot of the business' success. Creating a product that targets too specific of a market leads you to eliminate potential client space, while aiming too broadly paves way for a competitively hostile environment. This insight aligns with EDU-Copilot's core design: flexible enough to serve a broad student base while deep enough to deliver high-impact, individualized advising and planning.

The interview also revealed early-stage software development challenges, such as working without test environments, and having to simultaneously fulfill roles as business analyst, developer, and QA. These lessons inform our own infrastructure planning and reinforce the value of modular, test-driven development from day one.

Porter's Five Forces Analysis

- **Threat of New Entrants**: Moderate. The availability of LLMs and cloud tools lowers the barrier to entry, but long-term success requires domain-specific knowledge, educational partnerships, and user trust.

- **Bargaining Power of Buyers**: High. Institutional buyers demand proof of effectiveness, ease of integration, and value alignment with retention and graduation goals.
- **Bargaining Power of Suppliers**: Low. EDU-Copilot uses widely available technologies (e.g., cloud platforms, open-source AI), minimizing supplier dependency.
- **Threat of Substitutes**: Moderate. Human advisors and static planning tools remain, but none match EDU-Copilot's round-the-clock, AI-driven personalization.
- **Industry Rivalry**: High. The space includes multiple competitors, though most fail to integrate academic and career advising into a cohesive, user-friendly experience.

Competitive Landscape

Competitor	Strengths	Limitations
Advisor.AI	University-focused integrations	No direct-to-student access
Ellucian DegreeWorks	SIS integration, established brand	Poor user interface, lacks AI personalization
Stellic	Degree audit tools	Minimal career path planning and limited AI features

Positioning and Differentiation

EDU-Copilot positions itself as a hybrid solution, serving both direct-to-student needs and institutional integration requirements. Unlike single-purpose competitors, EDU-Copilot provides holistic support: academic tracking, skills-based career planning, and actionable insights for both students and administrators.

By intentionally targeting the "middle ground" referenced in the Input 1 interview, EDU-Copilot ensures broad appeal while delivering targeted, high-value features that competitors overlook.

Potential Partners

To enhance our offering and scale impact, we are exploring partnerships with:

- **Learning Management Systems (LMS)**: e.g., Canvas, Blackboard – for curriculum and grade integration.
- **Career Platforms**: e.g., Handshake – to link course paths with job opportunities.
- **Skills Data Providers**: for enriching career recommendation algorithms.

These collaborations will deepen EDU-Copilot's ecosystem, improve institutional adoption, and further validate the platform's position as a best-in-class advising solution.

Marketing Plan

EDU-Copilot's market strategy is centered on reaching and connecting with three distinct but interconnected audiences: students, colleges and universities, and advertiser/employer customers. Through an evidence-based strategy, segmented media, and well-crafted messages, EDU-Copilot will be a top contender in AI-powered academic and career guidance. The strategy targets benefits over features and attracts top-down (institutional adoption) and bottom-up (student-to-student) adoption for maximum growth and sustained impact.

Reaching Students (B2C)

EDU-Copilot's B2C approach is centered around enrolling students using a freemium web-based platform that also acts as the primary acquisition funnel. The model enables students to have immediate value through academic planning tools, AI-based document parsing, and scholarship identification, while also providing a smooth upgrade path to a paid subscription. Our vision is to create a large, active user base that will naturally translate into paying users and act as a viral growth driver.

To reach students where they already live, we will invest in targeted digital advertising across platforms like TikTok and Instagram, leveraging search and display ads structured around critical student pain points, such as uncertainty about course planning, scholarship availability, and lack of direction around careers. Concurrently, we will also introduce a robust content marketing campaign comprising SEO-friendly blog posts, YouTube tutorials, and guides that generate organic traffic, as well as establish EDU-Copilot as the industry's voice of authority.

At the same time, EDU-Copilot will activate grassroots action with a campus ambassador program. Student ambassadors will deploy awareness with peer-to-peer reach, table events, and social media updates. To leverage word-of-mouth further, we will also have an integrated referral program that rewards users that refer the platform. One of the major differences in our approach is product-led growth, particularly from our AI-driven document parsing feature on first-time onboarding, which immediately highlights the intelligence and strength of the platform and invites share-the-love viral action.

Our messaging will be centered around empowerment and potential, with slogans like "Navigate college confidently" and "Plan your academics and career seamlessly." Our freemium will provide essential tools like academic planning and minimal scholarships, and our $10/month premium unlocks additional advanced AI features, deeper career alignment, and ad-free experience. Signups will be self-service in nature, supported by in-app guidance that will encourage students to upgrade when they reach points of highest value realization.

Engaging Institutions (B2B)

For institutions, EDU-Copilot will be a catalyst partner that enables scalable, data-driven advising. Most institutions are under tremendous pressure to improve student retention,

satisfaction, and graduation rates but face acute advisor shortages and operational inefficiencies. According to NACADA, the average student-to-advisor ratio is as high as 1,000:1, leaving thousands of students without adequate access. EDU-Copilot fills this gap with AI-powered, always-available support that supplements human advising and scales institutional reach.

Our outreach to the universities will be account-based marketing. We will directly engage decision-makers such as Deans, CIOs, and VPs of Student Success through personalized emails, LinkedIn campaigns, and one-on-one meetings. Conference participation at EDUCAUSE and NACADA will enhance our visibility and reputation, affording us valuable opportunities for lead generation and building relationships. In addition, we'll develop thought leadership content (webinars, white papers, and case studies) that speak to important institutional priorities and showcase the strength of EDU-Copilot to drive top-of-mind metrics.

Pilot projects will be a central component of our institutional selling approach. Systematic pilots will allow prospective clients to pilot the platform in a controlled setting, monitor quantifiable results, and demonstrate the value of the platform prior to mass acceptance. We'll also pursue EdTech consultant collaborations and integration company partnerships to further technical implementation and expand institutional reach.

The colleges' value proposition is clear: improved student outcomes, improved advising, and measurable ROI. Our pricing will be tiered by full-time enrollment and feature set, with optional implementation fees and contract discounts for multi-year agreements. The sales cycle is expected to be 6 to 18 months and will require experienced sales personnel familiar with the procurement processes in higher education.

Monetizing with Advertisers & Employer Partners

To ethically monetize the freemium student base and create new value streams, EDU-Copilot will establish strategic alliances with advertisers and employers. Advertisers will be able to reach highly targeted and engaged students through non-intrusive, contextually-sensitive placements across the site. We envision having a self-serve ad portal for smaller advertisers and direct sales for larger brand partnerships.

Employer partnerships will focus on linking bridging students to career opportunities aligned with their course trajectories. Through probable API connections with tools such as Handshake or LinkedIn, and by permission of students, EDU-Copilot will give employers access to already actively planning students, resulting in more highly aligned, high-quality hiring.

Activities in this space for business development will involve direct solicitation, media kit distribution, and templated proposal generation for sponsors and hiring sites. Our pricing models will involve standard digital ad rates (CPM/CPC), premium placements, and variable partnership models such as revenue sharing or referral fees.

Competitive Positioning

EDU-Copilot plays a different game in the technology advising space. Unlike our competitors, such as Advisor.AI and Stellic, who have either exclusive university focus or less-than-complete career integration, EDU-Copilot has a single, complete end-to-end experience for students and institutions. This middle-market positioning, backed by research in the space and interviews in the market, serves the purpose of widespread accessibility with the high-impact personalization the competition is unable to deliver.

Our combined strategy also positions us with a competitive advantage in the development of partnerships. By partnering with LMS vendors such as Canvas or Blackboard, career platforms such as Handshake, and skills data partners, we have the ability to create a highly integrated ecosystem that further enhances platform utility and stickiness.

The Opportunity

The state of the US higher Education Ed Tech market, coupled with recent advanced breakthroughs in AI give EDU-Copilot a generous opportunity at this current time. Traditional advising processes are often inefficient and fragmented, leading to student frustration, inefficient course selections, and significant cost to the universities themselves. EDU-Copilot addresses this by providing an innovative, AI-powered, scalable solution designed to enhance student outcomes significantly while offering universities a more efficient way to support their student body. By combining LLM capabilities with key university data and direct student input, we streamline academic and career planning, making personalized guidance accessible and effective.

The need for a solution like EDU-Copilot is shown through clear market indicators, and known student pain areas. Students report gaps in essential advising functions, struggling to navigate complex degree requirements and connect their studies to future careers. Advisor caseloads remain untenably high at most institutions, which prevents the personalization students seek within advising. Furthermore, students face challenges in knowing where they should be searching for relevant financial aid. EDU-Copilot provides the solution for this, aiming to streamline the path to success through college and connect it to professional life. We empower students by centralizing their academic journey providing contextual, real-time insights and support. With this we address the common student frustration of needing information or advice that isn't readily available in one place. Institutions simultaneously benefit by gaining a tool to improve important metrics like retention and completion rates, while also providing more in depth student information. This clear alignment with student wants and needs and institutional goals, suggests favorable market conditions in the thriving and expansive US EdTech market.

There is a tipping point due to technological progress that especially with AI. Recent advances support more trustworthy, nuanced and conversational AI experiences, beyond simple automation to truly helpful assistance. We built EDU-Copilot leveraging these advances in technology – advanced natural language processing and the ability to parse unstructured documents (such as transcripts and requirement sheets) that students upload – to dissect and

understand transcripts, requirement sheets. Using complex graph based implementations our AI can successfully plan complex course pathways with ease. Student information is stored in a structured and encrypted manner, which allows for substantial accuracy across our model. This enables lightning speed personalization and a too good to be true user experience – both of which are absolutely necessary for adoption in our direct to student model. It's this technology advantage which allows us to package and customize functionality (academics, career, scholarships) with the depth of personalization that we do that gives us the edge.

To present an honest picture of EDU-Copilot, we've performed a SWOT analysis.

Strengths:

- Intelligent AI Core: Knowledgeable AI for tailored suggestions, professional pathing, scholarship comparison and unique document parsing to get you started fast.
- Comprehensive Student Success Focus: The only solution that combines academic planning, career, and scholarship search; all in a student centered environment.
- Improved Learning Experience: Designed for easy use and access: activated immediately, no installation required, instant access available across devices.
- Scalability & Potential Effectiveness: Provides scalable solution for manual advising methods and has potential to lower institutional costs of advising load while increasing student retention. Uses AI for core processing, aiming to work more efficiently as the user base increases.
- Direct Student Channel: B2C freemium - Direct User Acquisition, Feedback and Data Insights.
- Diversified Business Model: Revenue streams that cater to multiple segments of the industry can adjust easily to market conditions and have multiple entry points for monetization.
- Integrated Career Planning: Built-in tools connect academic achievement with career preparation and exploration.

Weaknesses:

- New Market Entrant: High cost and time to develop recognition of brand, credibility and user base (student & institutional).
- User Adoption Barriers: Requires successful strategies for student (Freemium uptake & conversion) and institutional (inertia, budget cycles) adoption.
- Partnership Development - Partner (univ, employers' platforms) endorsement/investment demand significance of value and traction.
- Potential Effect on Human Interaction: - Belief that AI tools could reduce stimulating contact with a valuable human advisor must be carefully managed by branding as supplemental tool.
- Platform Stability & Scalability: Stability is key in maintaining security, performance and reliability as users and feature complexity increase.
- Managing complexity: Efficiently dealing with operational and strategic challenges related to a multi-sided business model.

Opportunities:

- Large & Growing Market: Large addressable market in US higher education EdTech, and growing institutional demand for AI solutions.
- Documented Pain Points: Painful student and institutional needs support strong market pull.
- AI Development: With the AI development, we except the similar trajectory of improvements as AI techniques becomes reliable, feature rich, and cost-effective over the time.
- Strategic Relationships: Opportunities to partner with universities, leading career platforms (ex. Handshake, LinkedIn), employers and financial aid organizations.
- Differentiation in a Crowded Market: Ability to differentiate product in a marketplace clamoring for the "next best thing" due to the crowded field where most are merely one aspect of student success and not a truly integrated whole.

Threats:

- Competition – Present and Future: Incumbent SIS vendors are continuing to add features and other AI-focused startups are in play/possibly more mature.
- Institutional Budget Constraints & Sales Cycles: Due to universities' procurement processes and budget, they sometimes la for a long time.
- AI Trust & Data Governance: Trust about AI recommendations and the ethical handling of sensitive student data, including uploaded documents, is essential to develop and maintain.
- Regulatory Environment: Adherence to data privacy laws (e.g., FERPA) is critical and may change.
- New Entrant Risk: While high technical barriers (or complexity with AI and integrations) exist, market size allure could encourage new competition to your space.

Finally, EDU-Copilot is built to serve a clear and high-impact opportunity that is the result of continuing struggles for higher education advising, reinforced by market and technology trends. Although negotiating competitive dynamics, institutional intricacies, and the curveballs of scaling a tech business demand thoughtful leadership, our product vision, comprehensive feature set, and disciplined AI strategy place us in a good spot. By being relentlessly value-driven for both students and schools, by trusting our way to success with stable performance built on a base of being ethical in everything we do, and by executing effectively across our multi-stream model, we believe that EDU-Copilot can claim a meaningful market share and become the must-have tool for student success.

Operations Plan

Technology & Infrastructure

Our company is based on a state-of-the-art technology stack that enables scalability, security, and a user-friendly experience. Central to this platform is an AI-driven advising engine, which utilizes both academic and labor market data to offer students actionable advice on everything from academic planning to pathways to careers, as well as building skills. This engine is trained by using a mix of supervised machine learning methods and NLP models. It processes big data — including everything from degree audits and academic records to labor market data and job postings — and produces customized, real-time advice. The product is cloud-based, secure, and easily deployed with no IT involvement, and is secured in the cloud so users have easy access 24/7 and can ensure compliance with standards such as SOC 2, FERPA, and GDPR. We make use of scalable server back-ends of popular cloud service providers (e.g., AWS or Google Cloud Platform) to achieve high availability, redundant storage of data, and to enable performance boosts. Security is of utmost importance to us: user data is encrypted when transmitted to and from our servers, as well as at rest, and granular access controls are enforced at all levels of the architecture.

One of the key distinctions of our system is that it can be readily integrated with the existing university databases and the LMS. Through APIs and secure authentication methods (e.g., OAuth 2.0, SAML), we enable institutions to plug their data into our platform. This integration makes it possible to sync academic records, course availability, student progress, and more in real time — which in turn allows the advising engine to provide hyper-relevant and personalized advice. These integrations both facilitate the offer for institutional partners and decrease the amount of manual work that administrative staff and advisors need to perform. Additionally, we invest in continuing to build out our robust data warehouse that integrates academic, employment, and behavioral analytics. This single source of truth enables internal reporting, performance benchmarking, and ensures continuous improvement of the AI models. Data engineering and DevOps cooperate for seamless pipeline management, system soundness, and platform reliability. We also have monitoring and automatic alerts in place for performance issues and downtime. We use container orchestration technologies such as Kubernetes to manage our application deployment and maintain resiliency, and have continuous backups, as well as disaster recovery contingencies. These product enhancements are not only intended to ensure the protection of user data but also to provide a streamlined and reliable experience for students, advisors, and institutions.

Key Activities AI Model Development and Optimization

OUR USP

The engine of our AI is driven by its performance and context estimation. Our dedicated team of data scientists, machine learning engineers, and domain experts build and improve sophisticated algorithms that we use to predict academic outcomes, recommend course sequences, and match student profiles to high-demand career tracks. This involves:

- Retraining models with the evolution of the dataset
- Optimization of hyperparameters and features to increase predictability
- Applicability to real-world tests, university sets (anonymized)

- Frequent additions pertinent to changes in the academic calendar, new job trends, and shifts in skills requirements
- Using user interaction data to enhance recommendations based on reinforcement learning algorithms
- Working on developing explainability modules to show users and admins how a recommendation was made and why it was recommended.

Cooperating with Universities and Companies

Strategic cooperation is important for both content enrichment and user acquisition. We focus on:

- Establishing long-term relationships with universities to integrate their databases and for campus-wide promotion of the platform.
- Providing co-branded services to career services, advising centers, and academic departments
- Working with employers to determine job-ready skills, receive internship and job data, and perhaps onboard them as sponsors or hiring partners
- Attending academic and industrial-based conferences to promote brand identity and mutually beneficial collaboration opportunities.
- Launching advisory councils of camps including university partners, employers, and alumni to help steer product development
- Rolling out product updates based on user feedback

We are nimble and follow an agile process to stay ahead of user feedback and platform analytics. This includes:

- Scheduled design sprints for UX/UI enhancements throughout the year
- Gathering feedback via in-app surveys, focus groups, and user interviews
- Studying usage behavior as well as hotspots to find opportunities for optimization
- Introducing a CI/CD pipeline which would help to roll out new features faster
- Giving stakeholders roadmaps and changelogs for a little transparency and participation if possible
- Keeping an open issue tracker for everyone to see planned/working on changes.

Team Structure & Workflow

To be able to carry out these operations and focus areas with excellence, we have organized our operations group into four primary areas: Engineering, Data Science, Product Development, and Partnership Relations. The teams are cross-functional so that they align with user experience, technical capability, and market need. With weekly scrums, milestone reviews, and collaborative planning that occurs to keep initiatives on track and in line with company objectives. We're also backed by a dedicated customer support and implementation team that supports institutions in onboarding, training, and ongoing support. This helps every customer get a tailored, responsive experience with our platform, and to get the most value from us.

Conclusion

Combining world-leading AI technology with secure, scalable infrastructure and an unwavering commitment to collaboration with academic and industry partners, our operations plan ensures the company is equipped for sustainable growth and a positive global impact. We are not only committed to revolutionizing the industry through the creation of innovative career-centered software but also to disrupting the way students think about education and employment in a world that is ever-changing. We work to maintain an approach that is nimble, dynamic, iterative, and industry-agnostic to continue to keep our platform on the bleeding edge of edtech and career development.

Finance Overview

The following section describes our financial plan for the first three years of our business and assumes that the venture receives the investment requested. It outlines our sources of revenue, cost structure and assumptions, as well as our plan for generating profit and fulfilling our financial needs, described in detail in the attached Financial Model spreadsheet. Our business is targeted at building a large community of users and active accounts, expanding and then scaling it right from the start to allow for rapid growth and the rapid establishment of a market position based on our platform, while minimizing costs and ensuring that it leads to long-term growth and profitability.

Revenue Model and Projections: EDU-Copilot uses a White Space Revenue model to seize value in the higher education space:

- **B2C Subscriptions:** Students use the essential functionality for free (freemium) and pay if they want more advanced functionality ($120/year or $10/month). This stream is forecasted upon capturing large numbers of freemium users acquired through digital marketing, at a very conservative number of impressions converting to paid subscribers, of 0.12%.
- **B2B University Licenses:** Universities purchase annual licenses for an average of $100,000 per institution. According to our sales pipeline build up and 20% lead conversion rate, we expect to close approx 2.4 deals in Year 1 (revenue starting in Month 12) with the accumulated volume of the deals increasing by 10-15% each year.
- **Advertising Revenue:** We anticipate monetizing our freemium user base through targeted advertising and forecast revenue based on an approximate $0.01 per impression ($10 CPM) across expanding site traffic and engagement. Expected monthly traffic is 833,333 impressions to start. This also serves as a mechanism to encourage students to subscribe to the premium model.

- **B2B Employer Partnerships:** Sales target of 1 employment search partnership transaction in the first year (Revenue starts Month 12) at $25,000 per transaction with 15% volume growth realized annually once student user base scales. Those would be the Handshakes, the Courseras, the Udemy, (and others) who can promote their platform on our site.

From these streams, our financial model demonstrates top-line revenue expansion, initiating predominantly from B2C subscription and advertising revenue in Year 1, and subsequently stacking additional B2B revenue from university and employer relationships in Year 2. The income statement details monthly revenues that ramp up significantly during the 36 months covered in this model.

Cost Structure: Our business model includes a number of early stage investment and tier between variables costs that grow with use of the service and fixed overhead costs:

- **Start up Costs:** We need approximately $460,000 in initial start up capital. The majority of this is budgeted for Initial AI Model Development ($300,000), Initial IT Infrastructure & Server Setup ($75,000), IT Support/Service Setup ($40,000), Legal & Administrative Setup ($25,000) and Office/Operational Setup ($20,000). This early investment is crucial for us to begin developing our core technology and operations.
- **Cost of Goods Sold (COGS) / Variable Costs:** These are the costs that are associated directly with servicing and supporting users:
  - Cloud & IT Infrastructure – From $50,000 per year ($4,167/month) and up based on user growth vs. initial number of users and cost.
  - Data Gathering & Processing: Approximate cost is $30,000/year (or $2,500 per month).
  - Licensing Fees (AI API Costs): Priced a bit aggressively at an assumed $0.75/freemium user/month and $1.50/paid user/month. This would assume strong use of very cheap LLMs (Deepseek or whatever variant) and rigorous optimization and usage limitation in the freemium service level. Controlling this cost is critical to achieving targeted gross margins.
  - User Support Costs: $15,000 per year ($1,250/month) to begin which will likely increase with user growth (modeled as fixed by default).
- **Operating Expenses (OpEx):** These include costs of day-to-day operations for the company, such as:
  - Overall Marketing & Customer Acquisition: Budgeted at Year 1 = $160K ($13333/month to begin with), focused on B2C digital advertising,($100K/yr) and B2B sales/networking ($60K/yr) This total marketing budget is projected to scale logarithmically in the sales increase, to model the expected declining marginal acquisition cost as brand penetration increases over time.
  - Platform Build & Support: $50k per annum ($4,167 per month) for continued product development, R&D investment, feature developments, ongoing platform maintenance and health.

- ○ General & Administrative Overheads (G&A): From $50,000 per annum ($4,167 per month) including rent, utilities, insurance etc – likely to increase steadily as team size expands.
- ○ Payroll: We are hiring 7 full-time individuals for our initial team (CEO/CTO/Head of Sales/Marketing Lead/Student Success Guide/Full Stack Dev/Product Manager) and budgeting for 50 part-time Student Ambassadors. Monthly payroll (salaries + 20% benefits) assuming that personnel cost about $900,000 per year based on proposed personnel plan. We expect to add people as we expand (headcount growth assumption needs to be adjusted in future).

Profitability and Key Metrics: We model gross margins expanding over time, due to faster revenue growth than scaling of COGS. According to these assumptions the income statement predicts EDU-Copilot to reach the operational break-even (positive EBIT) at the end of Month 12. The total "Realized All Time Profit" (including initial startup costs) turns positive at month 26.

Cumulative Realized Profit Over Time (Includes Startup Costs)
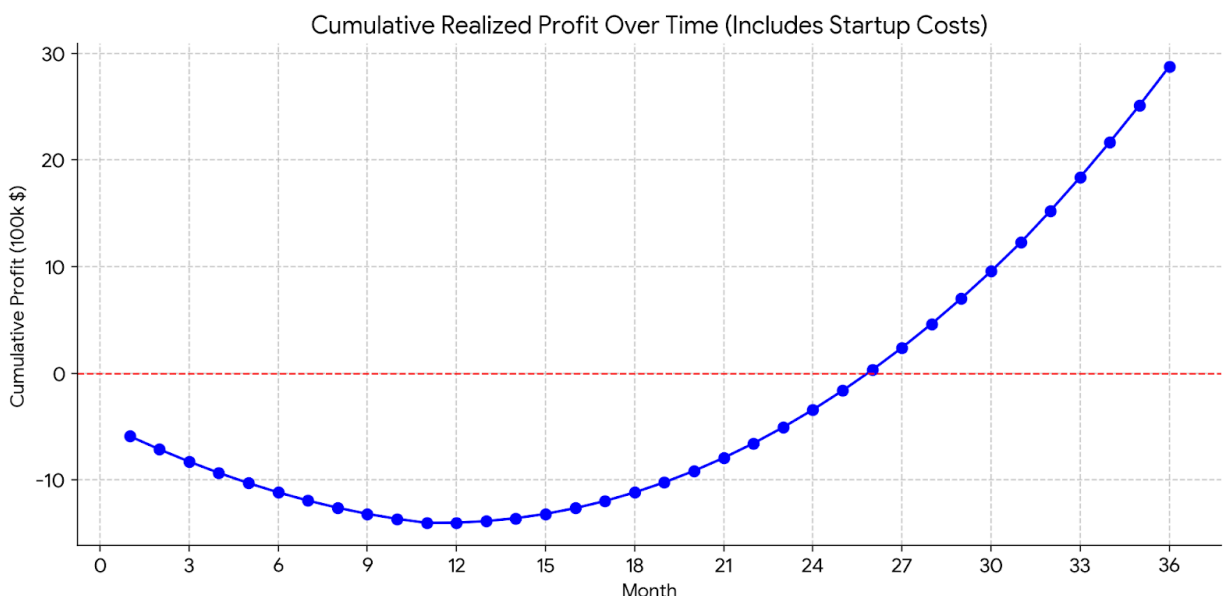
We are focusing on strong unit economics:

- **Customer Acquisition Cost (CAC):** For B2C, given the overall Year 1 Marketing and Acquisition budget ($100k digital marketing, $60k sales), and projected paid conversions (12,000, ie 10M impressions * 2% sign up * 6% paid), the implied B2C CAC is $12.00. For B2B, with a $5,000 cost per lead and 20% conversion the B2B CAC is $25,000 per university.
- **Customer Lifetime Value (LTV):** Our B2C LTV goal is $480, calculated as the $120 annual subscription fee multiplied by the assumed average paid subscriber retention of 4 years. For B2B universities, how an ACV of $100k, and expected multi-year relationships, the LTV is much larger.

Key Assumptions Summary: Our financial projections are based on, and will depend upon the following assumptions that are subject to regular monitoring and validation:

- Reaching a B2C freemium-to-paid conversion 6% (Lack of access for free users spurring subscription rate).
- Keeping AI API costs at around $1.5/user/month to enable such wonderful workflows through tech selection/optimization.
- Converting 20% of qualified university leads to $100k ACV customers within target timelines.
- Logarithmic change for efficient growth of marketing spend.
- Staffing needs could be met at forecasted Payroll Budget.

Funding Requirements: In order to finance the upfront $460k in startup costs, and to cover a level of operating loss expected for the ~21 months to hitting positive EBIT (with the cumulative total of the highest level of loss exceeding $1.4MM at Month 11 as provided in the detailed model), EDU-Copilot is looking to raise $2.0MM Pre-Seed funding. This capital is essential to:

- complete the stages of platform development and AI tweaking.
- Implement our Year 1 marketing and sales plan to acquire users and win our first B2B clients.
- Grow the core team, with an emphasis on engineering and sales/marketing.
- It's also wise to give enough operating runway (18-24 months) to hit key milestones such as profitability and meaningful market traction.

We are convinced that venture capital is the best source of funding, it provides more than money. We hope to get the strategic help and network necessary to understand and grow through the complicated and changing world of EdTech to reach our ambitious growth expectations. The investment will enable EDU-Copilot to seize the market opportunity we have identified and become the category leader in AI student success.

Team

- **Sebastian Conway-Burt CEO & Visionar**y: As CEO of **EDU-Copilot**, with a Mathematics degree from CU Boulder, I lead the strategic vision, business development, and execution of our AI-powered academic advising platform. My main focus is ensuring seamless integration with universities and direct value for students. My role focuses on driving innovation, building key partnerships, and scaling our solution to revolutionize student success and career planning.
- **Ethan Meli CTO & AI Lead:** As a Computer Science student at CU Boulder with minors in French and Business, I bring a strong blend of technical expertise and business insight to EDU-Copilot. With extensive experience in AI model development and optimization, I lead the design of our AI algorithms that deliver personalized academic

advising at scale. Supported by a team of industry advisors, our ability to integrate advanced AI solutions ensures that EDU-Copilot stands out by providing tailored, data-driven guidance 24/7, giving us a significant competitive edge in the edtech market.
- **Thomas Notarainni Business Development & University Relations:** I drive partnerships, market expansion, and innovation for our company. My economics degree helps me analyze market demand, optimize pricing, and assess cost-benefit scenarios for EDU-Copilot. I also leverage university partnerships for research, funding, and product testing while identifying economic incentives. Additionally, I use economic impact assessments to influence policies that support sustainability and product adoption.
- **Emily Byars Student Success Guide:** Providing insight on student needs and using these insights to manage student success on the platform, which allows us to continue to evolve the AI tool to better suit student demands.

Conclusion

EDU-Copilot transforms academic and career advising by providing AI-driven, personal, and cost-effective solutions for students, universities, and employers. By combining personalized recommendations, data-driven insights, and university integration, we aim to revolutionize student success and career readiness. The demand for digital advising tools is growing, and EDU-Copilot is well-positioned to capture this emerging market opportunity.

Appendices

a) [Business Model Canvas](#)

b) Interview Summaries

Market Interviews

Q: If you could start college over, what academic differences would you make?
A: Take part in FGX - business travel (cost money for why not to do it and didn't think to be worth)
A: Would've taken easier gen eds in the first couple years. Wouldn't have started as biology major, would've made sure he didn't decrease gpa with difficult classes that ended up being

irrelevant to major. Would want to use advisor and college resources more, under utilized with academics and careers as well.

A: Probably none since he didn't have a choice. Dual emphasis made it tough for course choices and typically last choice based on credit hours.

Q: Do you feel like your advisor has a personal connection with you?
A: Not at all. However, his master's advisor is a lot better.
A: Not at all. Only talk when required, and not because of a connection. Helpful but not personal connection.
A: Yes. Has a good idea of what's going on in academic life.

Q: How often do you meet with your advisor?
A: Someone new every time, never the same person
A: Once a semester.
A: Four times a year.

Q: How easy is it to meet with your advisor?
A: Booking itself is easy but very far in advance
A: Fairly easy, only difficult when everyone is trying to get their requirement done. Business difficulty with base classes and declaring a major. Easy otherwise wise calendar and zoom.
A: Usually booked out. Window to be open for drop in hours but usually needs two to three weeks out to book something.

Q: How do you know a meeting went well?
A: Knows what classes he's supposed to take
A: Tell what classes to take to stay on track with graduating. When they build an excel spreadsheet with a course schedule. General check ins with GPA and recommendations for future career advice.
A: Making sure classes were in line for graduating in three years. Would get an updated spreadsheet that was helpful, understanding what needs to be done by a certain time to stay on track.

Q: What are the biggest challenges you face during academic or career planning?
A: Career on his own, getting classes available, credit system makes it difficult until you have a lot
A: Little difficulty as the schedule is pretty planned out for business majors. Balancing gen eds with major coursework since the load can quickly become overwhelming.
A: Kind of threw the schedule together and things fell into place with university. Had an outside network for jobs. Timing of classes, having early morning classes because of low priority on selecting classes (less credits).

Industry Interview

Q: What was your first year like at Input 1?

A: Had to do everything, while his brother was developing the initial software. Decided to do software from there as that was the best option there. Partly choice and circumstance. 3rd or 5th employee.

Q: Why choose this as a career?
A: Always spent a lot of time on computers - doing coding.

Q: What was the most difficult aspect of starting a business in the software space?
A: Their specific software wasn't compliant with every state. Have an auditor to fix, but the real issue was never addressed. Look at the big picture (business requirement) and what's necessary to accomplish it. The more that's there the more you need to understand.

Q: What would you do differently if you could do it all over again?
A: Tunnel vision at beginning. Can broaden and adapt what a client wants to be marketable for more people. Don't fit to just one particular user, eliminating potential client base. Checking what else is out there, something more generic rather than specialized. Generic loan for customers as core, and then specialize from there. Knowing other technologies out there. Example of database system, knowing what the right one is to choose as to not become deprecated. Got lucky in the language they chose, however.

Q: If you could give a new founder one piece of advice, what would it be?
A: Toughest part is understanding the market (for software business). If something is too specific, limiting, too generic, too many competitors.Trying to find some middle ground, there needs to be a need but not too much competition.

Q: How was the organization of the software initially?
A: No testing environments, just making changes in real time. Would add things as they came up. Had to be the BA, dev, and QA.

c) Financial Statement
🗴 EDU-Copilot Financial Statement.xlsx

d) Sources
https://www.technavio.com/report/edtech-market-industry-analysis (edtech market evaluation)
Technavio Market Analysis
https://my-ibisworld-com.colorado.idm.oclc.org/us/en/industry/61/at-a-glance (money spent on education services in US)
Generative AI in Digital Education
AI Market Analysis and Segmented Forecast

(https://www.dailycamera.com/2019/06/03/cu-boulder-committee-recommends-adding-advisors-to-boost-student-success/) .