

Production-Readiness Assessment and Consolidated Plan

Executive Summary

Current status: **~85% production ready** with enterprise-grade security, multi-tenancy, and solid assessment workflows in place. Remaining gaps are concentrated in advanced analytics and scoring, export/reporting completion, removal of mock implementations, and final production hardening. Addressing the items below will close the gap to 100% readiness.

Implementation Status (Consolidated)

Fully Implemented

- **Core user journey:** Landing → Registration → Email Verification → Account Type Selection → Pricing by account type → Stripe payment → Dual onboarding (Business vs Consultant) → Dual dashboards → SetupGate (email → payment → onboarding → dashboard).
- **Authentication & security:** Magic-link email verification with Resend primary and SendGrid fallback, JWT with refresh rotation, 2FA (TOTP, QR, backup codes), device fingerprinting, session management, rate limiting.
- **Multi-tenant RBAC:** Tenant isolation for Business and Consultant, role-based permissions including facility-level, client management CRUD for consultants, white-label branding.
- **Data infrastructure:** PostgreSQL + Drizzle, complete schema across tenants/users/licenses/facilities/assessments/client orgs, perpetual license management, cloud storage connectors (S3, Google Drive, OneDrive, Dropbox, Azure).
- **Additional platform features reported as complete:** Facility management, license management flows, assessment workflow creation and progress tracking with question filtering, evidence management, responsive UX/PWA/WCAG/i18n, consultant client workflows.

Partially Implemented

- **Assessment full workflow:** API routes, REC mapping, and dynamic question filtering exist; needs E2E validation and UI polish.
- **Exports & reporting:** Service structure present; needs full population of PDF/Excel/Word templates with live assessment data and white-label elements.
- **Team management:** RBAC basis exists; needs invitation flow and user management UI.
- **Analytics:** Widgets exist; needs real data integration and predictive insights.

- **Intake, Q&A, analytics depth, export completion:** Intake ~85% with validation gaps; Q&A ~75% with dependency handling; analytics ~70% with advanced algorithms pending; export ~60% template completion.

Mock/Placeholder or Incomplete Elements

- **Development/test artifacts:** Mock Stripe webhook, test account setup script, console email fallback in dev, test-user bypass in rate limiting; some dashboard metrics use placeholder calculations; test data generators.
 - **Advanced capabilities not yet real:** Advanced scoring algorithms, mock audit simulator, antivirus scanning mocked, portions of analytics dashboard use mock data, corrective-action tracking UI incomplete.
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Industry-Aligned Journey Verification

- **Aligned:** Pre-auth flow, account branching, Stripe payment, onboarding wizard (V1/V2 present), distinct Business/Consultant dashboards.
 - **Partial alignment:** Email verification automation helper, pricing filter checks by account type, SetupGate edge cases.
 - **Gaps:** Production Stripe keys in place of test mode, full rollout of advanced Onboarding V2 behind feature flag, expanded Consultant Client Portal features.
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Consolidated Phased Plan to Reach 100%

Phase 1 — Critical Production Safety

Remove or gate mock payment features; disable test-user bypasses; validate email failover chain; enforce strict Stripe webhook validation; audit and remove dev-only endpoints.

Phase 2 — Complete Assessment Workflow

Run E2E: Intake → REC mapping → Questions → Evidence → Scoring; validate dynamic question filtering; complete scoring engine with real R2v3 calculations; polish assessment UI; finalize evidence upload and organization.

Phase 3 — Export & Reporting

Finish PDF executive summary and technical audit; Excel gap analysis; Word detailed findings; integrate white-label branding; enable email delivery of reports.

Phase 4 — Team & Multi-User

Implement team invitations and management UI; facility-level assignment; consultant-client collaboration; activity logs and audit trails.

Phase 5 — Analytics & Insights

Wire real data into widgets; activate predictive insights; add benchmarks, historical trending, and consultant analytics.

Phase 6 — Production Hardening

Validate env vars and secrets; migration safety; monitoring and alerting; performance optimization; final security sweep.

Supplementary, file-specific execution notes: de-mock analytics and evidence services, implement advanced scoring service, complete export service templates, configure production Stripe route changes, toggle feature flags, and run full build + E2E/integration suites.

Production-Readiness Checklist (Unified)

Environment configuration

- Production Stripe keys
- DB connection strings
- JWT secrets
- Email service
- Cloud storage credentials

Security hardening

- Remove all test users
- Configure rate limiting
- Tighten CORS
- Security headers
- Audit logging

Performance

- DB indexes
- Caching strategy
- Bundle size optimization
- CDN for static assets

Monitoring & observability

- Health checks
- Error tracking
- Performance monitoring
- Alert rules

Final validation

- Build artifacts and run E2E + integration suites prior to release.
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Risk and Gap Focus (Actionable)

1. **Mock artifacts in the request and payment paths** risk revenue integrity; remove/gate immediately.
 2. **Advanced scoring and analytics** are required for credible insights; implement non-mock algorithms and live data pipelines.
 3. **Export/reporting** must output branded, data-complete deliverables; finish template population and delivery.
 4. **Team management UX** is needed to operationalize RBAC at scale; add invitations and management UI.
 5. **SetupGate edge cases and pricing filters** require verification to ensure consistent onboarding control.
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Current Readiness and Outlook

With the above phases executed, the application will close the remaining 15% gap to full production readiness. The architectural base is strong; the remaining work is focused, tractable, and largely concerns completing integrations, removing mock paths, and tightening production operations.

Source Documents

Consolidated from both uploaded documents.