**Project Zephix: Business Plan & MVP Roadmap**

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**1. Executive Summary**

**The Opportunity**

The current market for project and portfolio management (PPM) software, despite being crowded with major players like Asana, Monday.com, and Microsoft Project, suffers from a universal, fundamental flaw. These tools are flexible but not intelligent. They are passive systems that require project managers to perform thousands of manual, time-consuming, and error-prone tasks. This "administrative scavenger hunt" costs companies billions in wasted productivity and leads to significant project delays and failures.

**Our Solution: The "Intelligent Co-pilot"**

Project Zephix is a new paradigm in project management. We are building an **Intelligent Co-pilot** for project and program managers. Our platform leverages generative AI to transform the entire project lifecycle. Our "Human-First" approach ensures the project manager is always in control, using our AI to guide decisions, automate administrative work, and provide predictive insights.

**The Mission**

Our mission is to give project managers their time back, transforming their role from administrative data clerk to strategic leader by automating the tedious work of planning and reporting.

**2. Phase 0: Pre-Flight Checklist (Duration: 1 Week)**

**Objective:** To establish the legal foundation of our partnership before creating valuable intellectual property. This is the single most critical step to protect both founders and the future company.

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| **Task ID** | **Task Name** | **Key Deliverable** | **Status** |
| **0.1** | **Execute Founders' Agreement** | A signed agreement covering equity split, roles, vesting, and a clause assigning all created IP to our future company. This is a non-negotiable first step. | **To Do** |

**3. Phase 1: Validation & Demo Development (Duration: 7 Weeks)**

**Objective:** To build a functional demo prototype while simultaneously validating our core business assumptions with real market feedback.

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| **Task ID** | **Task Name** | **Key Deliverable** | **Owner(s)** | **Status** |
| **1.1** | **Define Demo Scope & Specs** | A concise document outlining the exact features and user flow of the demo. | Me | **To Do** |
| **1.2** | **Build Functional Demo** | A working, clickable prototype that demonstrates the core "BRD-to-Plan" workflow. | Me | **To Do** |
| **1.3** | Develop Lean Business Canvas | One-page summary of our business model. | Shared | **To Do** |
| **1.4** | Define Ideal Customer Profile (ICP) | Detailed document defining our first target user and buyer. | You | **To Do** |
| **1.5** | Create Structured Interview Script | A questionnaire for validation interviews. | You | **To Do** |
| **1.6** | Conduct Market Validation Interviews | Synthesized notes from at least 10-15 interviews, using the demo where appropriate. | You | **To Do** |
| **1.7** | Deep Competitive Analysis | A matrix comparing features/pricing of 15 competitors. | Me | **To Do** |
| **1.8** | Secure Brand Assets | Confirmed company name and purchased domain. | Me | **To Do** |

**4. Phase 2: Legal Formalization & Go-to-Market Prep (Duration: 4 Weeks)**

**Objective:** To create the legal entity and marketing foundation necessary to engage with the public, using the demo and validation data to build momentum.

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| **Task ID** | **Task Name** | **Key Deliverable** |
| **2.1** | Incorporate the Company | Certificate of Incorporation (Delaware C-Corporation). This can now proceed with confidence. |
| **2.2** | Open Business Bank Account | An active business checking account under the new company's name and EIN. |
| **2.3** | Develop "Minimum Viable Brand" | A simple logo, color palette, and one-paragraph brand voice guide. |
| **2.4** | Build "Coming Soon" Landing Page | A live webpage featuring a video of our demo and an email capture form for a beta waitlist. |
| **2.5** | Formalize "Expert Council" | Signed NDAs & Advisor Agreements with the 2-4 trusted PMs who will be our first alpha testers. |

**5. Phase 3: MVP Development & Alpha Launch (Duration: 12 Weeks)**

**Objective:** To expand the demo into a full MVP and launch it to our "Expert Council" to gather critical feedback and our first case study.

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| **Task ID** | **Task Name** | **Key Deliverable** |
| **3.1** | Define MVP Technical Specs | A detailed PRD for the development team, expanding on the validated demo features. |
| **3.2** | **Execute Pilot Program** | Complete the "Zephix vs. Monday.com" A/B test on a live project. |
| **3.3** | Onboard Alpha Testers | The "Expert Council" is onboarded with access to the MVP. |
| **3.4** | Establish Feedback Loop System | A private Slack channel or similar tool for collecting feedback. |
| **3.5** | Begin Initial Content Marketing | The first 3-5 blog posts are published, focusing on the *problem*. |
| **3.6** | Draft Version 1 of Investor Pitch Deck | An initial 10-slide deck featuring results from the Pilot Program. |

**6. High-Level Technical Architecture & Design**

**Objective:** To outline the foundational technical strategy for building a scalable, secure, and intelligent platform.

**Guiding Principles**

* **Scalability:** The architecture must support growth from a handful of alpha testers to thousands of enterprise users without a complete redesign.
* **Security:** Security is not an afterthought. The system will be designed with enterprise-grade security from day one.
* **Modularity:** The system will be built as a series of interconnected services.

**Core Architecture**

We will adopt a **Cloud-Native, Microservices Architecture** on a major cloud platform like **AWS** or GCP.

**Technology Stack (Initial Proposal)**

* **Frontend:** **React**
* **Backend Microservices:** **Python** (for AI/ML) and **Node.js** (for real-time I/O).
* **Database:** A multi-database approach using **PostgreSQL** for relational data and a **NoSQL** database for unstructured data.
* **Infrastructure:** **Docker** and **Kubernetes**.

**AI Model Strategy**

We will use an **AI Orchestration Layer** to manage multiple **Specialized, Fine-Tuned Models** that are enhanced with **Retrieval-Augmented Generation (RAG)** for accuracy and credibility.

**Data Management & Security**

The architecture will be designed for **Data Isolation**, **End-to-End Encryption**, and strict **Role-Based Access Control (RBAC)** to be compliant with SOC 2 / ISO 20001 standards.

**7. Intellectual Property (IP) Protection Strategy**

**Core Principle:** Our most valuable asset is our unique, end-to-end workflow. We will protect this workflow methodically before exposing it to a wider audience.

**The Sequential IP Plan:**

1. **Internal Validation First:** We will complete our internal Pilot Program to confirm the value and refine the core workflow.
2. **File a Provisional Patent Application (PPA):** Upon successful internal validation, we will immediately engage an IP lawyer to file a PPA. This gives us "patent pending" status for 12 months.
3. **Launch Secure Beta Program:** **Only after the PPA is filed**, we will expand testing to a wider group of project managers, all under strict NDAs.
4. **File Full Utility Patent:** Using feedback from the beta program, we will file the full, non-provisional patent before the 12-month PPA window expires.

**8. Pilot Program & Validation Framework**

**Objective:** To generate undeniable, data-driven proof of Zephix's value proposition by running a live project in parallel on our platform and a leading competitor's platform.

**The "Zephix vs. Monday.com" Scorecard**

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| --- | --- | --- |
| **Category** | **Metric** | **How to Measure** |
| **Output (Effort)** | **Planning & Setup Time** | Log total person-hours required to take a BRD to a fully detailed project plan in each system. |
|  | **Weekly Admin Time** | Log weekly hours spent on reporting, dashboard updates, and other administrative overhead in each tool. |
| **Delivery Quality** | **Plan Compreprehensiveness** | Score each initial plan on a 10-point scale based on the inclusion of risks, dependencies, budget, etc. |
|  | **Missed Risk/Dependency Log** | Document every critical risk or dependency the Zephix AI flagged that was missed in the manual planning process. |
| **Stress Level (UX)** | **Weekly Confidence Score** | A simple 1-10 survey: "How confident are you in the status of your project?" |
|  | **Cognitive Load Score** | A simple 1-10 survey: "How much mental energy did you spend 'fighting your tool' this week?" |

**9. Conclusion & Immediate Next Steps**

This updated plan prioritizes the creation of a tangible demo to accelerate validation while ensuring our partnership and intellectual property are protected from day one.

**Our immediate, singular next step is Task 0.1: To execute a Founders' Agreement.** This formalizes our partnership and allows us to begin building the demo with legal clarity and alignment.