

# KDM & ASSOCIATES

## CONSORTIUM PLATFORM

Complete Build Brief & Implementation Plan



**Document Version:** 1.0

**Date:** January 17, 2026

**Project Status:** Planning & Development Phase

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# EXECUTIVE SUMMARY

The KDM Consortium Platform is a comprehensive B2B government contracting enablement SaaS designed to bridge the gap between small-to-medium enterprises (SMEs) and federal/defense procurement opportunities. This platform serves as a multi-tenant consortium hub connecting 6 vertical partners to serve 477+ clients, with 148 actively engaged in DoD contracting.

## Core Mission

- **Proof Pack System:** Convert scattered compliance documents into buyer-ready evidence packages
- **Warm Introductions Engine:** Facilitate qualified introductions to DoD/OEM decision makers
- **Consortium Coordination:** Unified platform preventing service overlap across 6 vertical partners
- **Revenue Conversion:** Track intro → meeting → RFQ → award funnel

## Current State

- **Platform Status:** 20% feature completion against requirements
- **Existing Infrastructure:** Event management, Stripe payments (full + partial), basic portal
- **Legacy Website:** kdm-assoc.com requires full migration and integration
- **Client Database:** 477 clients (148 DoD contractors) currently in JotForm/spreadsheets

**Total Investment Required: \$151K-225K over 12 months across 5 phases**

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# 1. BUSINESS CONTEXT & MARKET POSITION

## Project Type

**Multi-Tenant B2B SaaS Platform - Government Contracting Consortium Hub**

## Target Audiences

### Primary Users (SMEs):

- 477 small businesses seeking government contracts
- 148 DoD contractors (Defense lane)
- Manufacturing firms (Battery/EV, general manufacturing)
- CMMC certification candidates
- Critical minerals suppliers

### Buyers/Decision Makers:

- DoD agencies, prime contractors, OEMs
- Government procurement officers
- Prime contractor supplier diversity teams
- Commercial OEM procurement (Battery/EV, Biopharma)

## Competitive Differentiators

- **Dual-Lane Approach:** Government + Commercial (Battery/EV, Biopharma) lanes
- **Gated Introductions:** Only pack-ready SMEs get buyer access
- **Consortium Coordination:** 6 verticals with lane management to prevent overlap
- **Evidence-Based:** Portable proof packs vs. scattered documents
- **Conversion Focus:** Track intro → meeting → RFQ → award metrics

## 2. CONSORTIUM STRUCTURE

### Vertical Partners & Responsibilities

Partner	Vertical	Key Services	Target Market
V+ Strategic Value Plus	Manufacturing	Supplier readiness, capacity building	38 corporations, Battery/EV
American Defense Alliance	Defense	Defense contracting, prime relationships	DOD contractors
E3S	CMMC	CMMC training, assessment, certification	CMMC Level 1/2 candidates
LogiCore	Media	Content creation, PR, multimedia	All verticals (cross-cutting)
KDM-NMSDC	Critical Minerals	Supply chain, opportunity zones	Critical minerals suppliers
nDemand Consulting	Gov Contracting	Proposal development, compliance	Federal contractors

### Coordination Mechanisms

- **Service Overlap Prevention:** Vertical lane management with clear boundaries and automated lead routing
- **Revenue Share Framework:** Contribution tracking with multi-touch attribution model
- **Structured Handoffs:** Protocol for multi-vertical clients with escalation path
- **Performance Tracking:** Partner scorecards with quarterly settlements

### 3. TECHNICAL ARCHITECTURE

#### Current Technology Stack

**Frontend:** Next.js 16.0.7 (App Router), React 19.2.0, Tailwind CSS 4, shadcn/ui

**Backend:** Firebase Firestore (NoSQL), Firebase Auth, Next.js serverless APIs

**Payments:** Stripe (implemented), PayPal (planned)

**Hosting:** Vercel with auto-scaling

**Email:** SendGrid/Resend for transactional emails

#### Scalability Assessment

Component	Status	Action Required
Architecture	■ Excellent	Serverless auto-scales
Database	■ Good	Add indexes for queries
File Storage	■ Critical	Implement Firebase Storage
Analytics	■ Critical	Add GA4 + Mixpanel
Marketing Automation	■ Critical	Integrate Go High Level

## 4. FEATURE REQUIREMENTS OVERVIEW

The platform encompasses 15 major feature categories. Below is a comprehensive status overview:

Feature Category	Priority	Status	Phase
Lead Management & CRM	CRITICAL	■ Missing	Phase 1
Proof Pack System	CRITICAL	■ Missing	Phase 2
Introductions Engine	CRITICAL	■ Missing	Phase 3
Event Management	HIGH	■ 20%	Phase 0
Payment Systems	MEDIUM	■ Stripe	Complete
Marketing Automation	HIGH	■ Missing	Phase 3
CMMC Cohort Mgmt	HIGH	■ Missing	Phase 2
Analytics Dashboard	HIGH	■ Missing	Phase 1
Content Management	MEDIUM	■ Missing	Phase 1
Training Platform	MEDIUM	■ Missing	Phase 4

## 5. CRITICAL FEATURE GAPS

**CRITICAL:** The following three features represent the platform's core differentiators and are currently not implemented:

### Lead Management & CRM

**Why Critical:** Foundation for all client interactions and tracking

**Business Impact:** Cannot manage 477 clients or track conversion funnel without this

**Key Components:**

- Client database with segmentation by vertical/capability
- Lead tracking and handoff between partners
- Client journey mapping from discovery to award
- JotForm integration for data migration
- Multi-touch attribution for revenue share

### Proof Pack System

**Why Critical:** Core value proposition - 'Proof Pack + Warm Introductions'

**Business Impact:** Cannot deliver evidence-based buyer-ready packages

**Key Components:**

- Evidence Vault for versioned documents with expiration tracking
- Lane assessments (Government/Commercial)
- Gap analysis with 30/60/90-day remediation plans
- Pack Health scoring (0-100) and gating mechanism
- Secure document sharing with NDA controls
- QA review workflow before publishing

### Introductions Engine

**Why Critical:** Second core differentiator - qualified buyer introductions

**Business Impact:** Cannot facilitate warm introductions or track conversions

**Key Components:**

- Buyer-supplier matching algorithm

- Target decision maker database (DoD, OEMs, Primes)
- Intro Brief generation (1-page + secure pack link)
- Meeting scheduling and tracking
- Conversion metrics (intro → meeting → RFQ → award)
- Relationship stewardship protocols

## 6. WEBSITE MIGRATION STRATEGY

### Current State: kdm-assoc.com

- Homepage with hero section, 6 service categories, and key metrics
- News/blog articles (~50-100 posts)
- Event listings and registration
- About/Team pages with partner information
- Contact forms (JotForm integration)
- Existing domain authority and SEO value

### 6-Week Migration Plan

#### Week 1: Pre-Migration Audit

- Content inventory - catalog all pages, articles, media
- SEO preservation - export metadata and analytics baseline
- Data export in structured format
- URL mapping for 301 redirects

#### Weeks 2-3: Frontend Integration

- New route structure with consortium branding
- Co-branded vertical landing pages (6 partners)
- Responsive design implementation
- Component library setup

#### Week 4: Data Migration

- Migrate all articles to Firestore
- Upload media assets to Firebase Storage
- Update internal links and references
- Preserve SEO metadata

#### Week 5: Integration & Enhancement

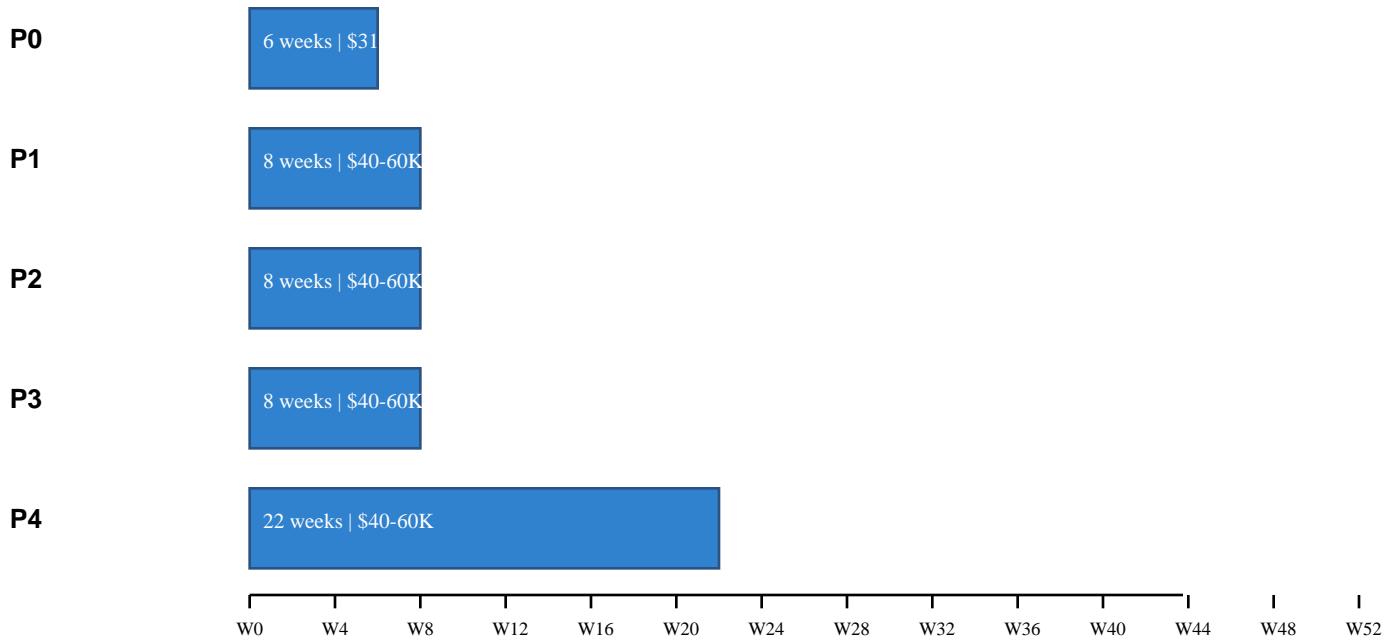
- Replace JotForm with integrated lead capture
- Update homepage with consortium branding
- Create CMS for ongoing content updates
- Test all forms and integrations

#### Week 6: Testing & Launch

- 301 redirects verification
- Mobile responsiveness testing
- Performance optimization (Lighthouse >90)
- DNS cutover and post-launch monitoring

## 7. IMPLEMENTATION ROADMAP & TIMELINE

The complete platform build is structured across 5 phases over 52 weeks:



### Phase 0: Website Migration

Duration: Weeks 1-6 | Budget: \$31K-45K

#### Key Deliverables:

- Migrated kdm-assoc.com website
- Co-branded vertical landing pages
- Integrated lead capture forms
- SEO preservation complete

### Phase 1: Core Platform Features

Duration: Weeks 7-14 | Budget: \$40K-60K

#### Key Deliverables:

- CRM & Lead Management MVP
- Content Management System
- Unified Admin Dashboard

- Analytics Infrastructure (GA4, Mixpanel)

## Phase 2: Core Value Delivery

Duration: Weeks 15-22 | Budget: \$40K-60K

### Key Deliverables:

- Proof Pack System MVP
- CMMC Cohort Management
- Document versioning and expiration
- Gap analysis tools

## Phase 3: Growth Engine

Duration: Weeks 23-30 | Budget: \$40K-60K

### Key Deliverables:

- Marketing Automation Integration (Go High Level)
- Introductions Engine MVP
- Buyer matching algorithm
- Conversion tracking dashboard

## Phase 4: Advanced Features

Duration: Weeks 31-52 | Budget: \$40K-60K

### Key Deliverables:

- Training & Certification Platform
- Governance & Compliance System
- Advanced Proof Pack features
- Revenue share automation

## 8. USER JOURNEYS & WORKFLOWS

### SME Journey: From Discovery to Contract Award

- 1. Discovery:** Website visit, event attendance, partner referral
- 2. Lead Capture:** Form submission with initial qualification
- 3. Initial Assessment:** Lane selection (Gov/Commercial), capability questionnaire
- 4. Gap Analysis:** Identify missing evidence and compliance requirements
- 5. Remediation Plan:** 30/60/90-day roadmap with milestones
- 6. Evidence Upload:** Document categorization into Evidence Vault
- 7. Pack Health Scoring:** 0-100 calculation based on completeness
- 8. QA Review:** Partner review and approval before publishing
- 9. Pack Publishing:** Secure link generation with NDA controls
- 10. Buyer Matching:** Algorithm identifies relevant decision makers
- 11. Intro Brief:** 1-page PDF with pack link sent to buyer
- 12. Introduction Sent:** Email to buyer with SME credentials
- 13. Meeting Scheduled:** Calendly integration for coordination
- 14. Conversion Tracking:** Meeting → RFQ → Award progression

### CMMC Cohort Journey

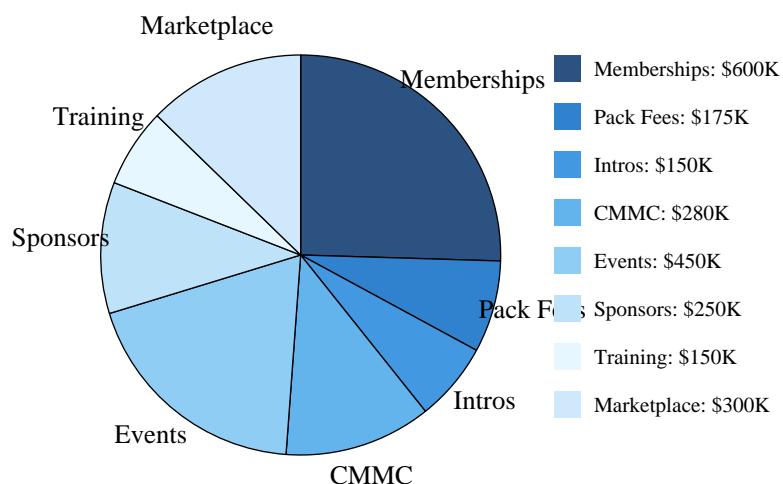
- Discovery → Webinar or landing page
- Enrollment → Registration and payment processing
- Initial Assessment → SPRS score analysis and gap identification
- Week 1-12 Curriculum → Weekly modules and assignments
- Policy Development → Templates, review, and implementation
- Progress Tracking → Deliverable submissions and feedback
- Certification Readiness → Final assessment and preparation
- Certificate Issuance → Digital certificate with verification

## 9. REVENUE MODEL & PROJECTIONS

### Membership Tiers

Tier	Price	Target Features
Free	\$0/month	Website content, newsletter access
DIY	\$99/month	Self-service tools, templates, basic support
DWY	\$499/month	Guided implementation, group coaching, assessments
DFY	\$1,999/month	Full-service, dedicated account manager, priority intros

### Revenue Streams Breakdown



### Year 2 Revenue Projections:

- **Membership Subscriptions:** \$600K/year (100 members × \$500 avg)
- **Pack Publishing Fees:** \$175K/year (50 packs × \$3,500)
- **Introductions Access:** \$150K/year (200 intros × \$750)
- **CMMC Cohort Enrollment:** \$280K/year (80 participants × \$3,500)
- **Event Registrations:** \$450K/year (600 attendees × \$750)
- **Event Sponsorships:** \$250K/year (20 sponsors avg \$12.5K)
- **Training Courses:** \$150K/year (200 enrollments × \$750)
- **Marketplace Services:** \$300K/year (30 engagements × \$10K)

**Total Projected Annual Revenue (Year 2): \$2,355,000**

## 10. BUDGET & RESOURCE REQUIREMENTS

### Development Budget by Phase

Component	Phase 0	Phase 1	Phase 2-4	Year 1 Total
Website Migration	\$31K-45K	-	-	\$31K-45K
Core Platform	-	\$40K-60K	-	\$40K-60K
Advanced Features	-	-	\$80K-120K	\$80K-120K
Development Team	\$23K-34K	\$31K-46K	\$93K-139K	\$147K-219K
Infrastructure	\$2K-3K	\$3K-4K	\$5K-8K	\$10K-15K
Marketing/Launch	\$5K-8K	\$5K-7K	\$10K-15K	\$20K-30K
Contingency (15%)	\$5K-7K	\$8K-12K	\$25K-38K	\$38K-57K
<b>Phase Total</b>	<b>\$66K-97K</b>	<b>\$87K-129K</b>	<b>\$213K-320K</b>	<b>\$366K-546K</b>

### Development Team Requirements

Role	Commitment	Annual Cost
Full-Stack Developer	Full-time	\$80K-120K
UI/UX Designer	Part-time (50%)	\$40K-60K
DevOps Engineer	Part-time (40%)	\$30K-45K
QA Tester	Part-time (40%)	\$35K-50K
<b>Total Team Cost</b>		<b>\$185K-275K</b>

### Third-Party Services (Annual)

- Vercel Pro: \$240
- Firebase Blaze Plan: \$1,200-3,600
- SendGrid Email: \$1,200-3,600
- Go High Level: \$3,600-6,000
- Mixpanel Analytics: \$0-3,600
- Other Tools & Services: \$3,000-10,000

**Total Third-Party Services: \$9,240-27,000/year**

## 11. RISK ASSESSMENT & MITIGATION

### Consortium Partner Alignment - Risk Level: HIGH

**Risk:** 6 partners with different priorities and timelines may create conflicts

**Mitigation:** Clear MOU, weekly sync meetings, monthly steering committee, defined escalation path

### Scope Creep - Risk Level: HIGH

**Risk:** 15 feature categories with ambitious requirements could expand beyond budget

**Mitigation:** Phased roadmap with MVP-first approach, strict change control process, weekly scope reviews

### Data Migration Complexity - Risk Level: HIGH

**Risk:** 477 clients from JotForm/spreadsheets may have data quality issues

**Mitigation:** Automated import with validation, manual review process, backup of legacy systems

### User Adoption - Risk Level: MEDIUM

**Risk:** SMEs and partners may resist new workflows and platform changes

**Mitigation:** User-centered design, comprehensive training program, gradual rollout with early adopters

### Technical Complexity - Risk Level: MEDIUM

**Risk:** Proof Pack and Introductions Engine are novel features with no existing templates

**Mitigation:** MVP approach, prototyping phase, extra time allocation, technical spike investigations

### SEO Impact - Risk Level: MEDIUM

**Risk:** Website migration could temporarily hurt search rankings

**Mitigation:** 301 redirects, sitemap submission, monitoring during transition, backup of all content

## 12. SUCCESS METRICS & KPIs

### North Star Metric: SMEs Converted to Contracts (intro → meeting → RFQ → award)

Target: 50 awards in Year 1, 150 awards in Year 2

### Key Performance Indicators

Metric	Year 1 Target	Year 2 Target	Measurement
New Leads	600	1,200	Monthly tracking
Conversion to Customer	72	180	Lead → Qualified → Customer
Proof Packs Published	50	120	Pack Health >70
Introductions Made	240	480	Intro → Meeting conversion
Contracts Awarded	50	150	RFQ → Award
CMMC Certifications	45	90	Completion → Certification
Event Attendance	600	1,200	Registrations → Attendance
Annual Revenue	\$1.2M	\$2.4M	All revenue streams
Customer LTV	>\$10K	>\$15K	Lifetime value
Churn Rate	<15%	<10%	Monthly retention

### Leading Indicator Funnels

#### Lead Generation Funnel:

- New Leads: 50/month (600/year)
- Lead-to-Qualified: 40% conversion (240/year)
- Qualified-to-Customer: 30% conversion (72/year)

#### Proof Pack Funnel:

- Time to First Pack: <30 days average
- Pack Health >70: Target 70% of published packs
- Intro-Eligible within 60 days: 60% target

#### Introductions Funnel:

- Intros per Month: 20 (240/year)
- Intro → Meeting: 40% conversion (96 meetings)
- Meeting → RFQ: 25% conversion (24 RFQs)
- RFQ → Award: 50% conversion (12 awards)

## 13. NEXT STEPS & RECOMMENDATIONS

### Immediate Actions (Week 1-2)

- **Stakeholder Alignment:** Schedule consortium partner kickoff meeting to review and approve brief
- **Team Assembly:** Begin recruiting full-stack developer and UI/UX designer
- **Technical Preparation:** Set up development environment, Firebase project, Vercel deployment
- **Content Audit:** Begin cataloging kdm-assoc.com content for migration
- **Budget Approval:** Secure funding approval for Phase 0 (\$31K-45K)

### Phase 0 Preparation (Week 3-4)

- **URL Mapping:** Complete comprehensive URL redirect mapping for SEO preservation
- **Design System:** Finalize consortium branding and design system
- **Data Export:** Export all existing data from JotForm and spreadsheets
- **Partner Branding:** Collect co-branding assets from all 6 vertical partners
- **Development Sprint 0:** Set up CI/CD pipeline, testing framework, monitoring

### Critical Success Factors

- **Partner Buy-In:** All 6 consortium partners must commit to timeline and resource allocation
- **Dedicated Resources:** Full-time developer availability is critical for timeline adherence
- **Phased Approach:** Resist temptation to skip MVPs; each phase builds on previous success
- **User Testing:** Involve real SMEs and partners in testing from Phase 1 onward
- **Change Management:** Comprehensive training and communication plan for platform adoption
- **Performance Monitoring:** Weekly progress reviews with clear milestone tracking

**Recommendation:** Proceed with Phase 0 (Website Migration) immediately while finalizing consortium partner agreements and assembling the development team. This allows for parallel progress on infrastructure while building organizational alignment.

## CONCLUSION

The KDM Consortium Platform represents a significant opportunity to transform government contracting enablement through a unified, evidence-based approach. With a clear roadmap, defined budget, and phased

implementation strategy, this platform can deliver substantial value to 477+ small businesses while coordinating 6 vertical partners.

Success depends on three critical components: (1) CRM & Lead Management to track all client interactions, (2) Proof Pack System to deliver evidence-based buyer packages, and (3) Introductions Engine to facilitate warm connections with decision makers. These features represent the platform's core differentiators and must be prioritized.

With a total investment of \$151K-225K over 12 months and projected Year 2 revenue of \$2.4M, this platform offers strong ROI potential while serving the critical mission of helping small businesses access government contracting opportunities.

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Keith Moore, CEO  
KDM & Associates

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Date