TAPFLOW

AI-POWERED LEAD GENERATION

Business Plan

Confidential Document

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1 Executive Summary

> **Investment Highlights**
>
> - **Market Opportunity:** $10B+ lead generation market growing 10-15% annually
> - **Unique Technology:** True AI agent orchestration—not just an LLM wrapper
> - **Strong Unit Economics:** 50-60% gross margins with clear path to profitability
> - **MVP Ready:** 60-70% of core technology already built and validated
> - **Seeking:** $500K seed funding for 18-month runway to product-market fit

1.1 Company Overview

Tapflow is an AI-powered lead generation platform that autonomously discovers, researches, qualifies, and nurtures sales prospects. Unlike existing solutions that require manual list building and workflow configuration, Tapflow handles the entire pipeline from "I need leads" to "ready-to-send personalized emails."

Founded in 2026, Tapflow addresses a critical gap in the $10+ billion lead generation market: **no existing solution provides true end-to-end automation**. Current market leaders like Clay, Apollo, and Instantly each solve parts of the problem but force customers to stitch together complex workflows. Tapflow eliminates this friction through proprietary AI agent orchestration technology.

1.2 Mission & Vision

Mission: Democratize enterprise-grade lead generation, making it accessible and affordable for businesses of all sizes.

Vision: To become the autonomous sales development platform that eliminates the busywork between "I need customers" and "closing deals."

1.3 Product Overview

Tapflow's core product automates the complete lead generation pipeline:

1. Intelligent Prospecting
- Natural language campaign creation
- Multi-source discovery (Google, Yelp, directories)
- Geographic and industry targeting

2. AI Research & Enrichment
- Website analysis and scoring
- Contact discovery and verification
- Tech stack and pain point identification

3. Automated Qualification
- Proprietary scoring algorithm
- A/B/C tier segmentation
- Fit-based routing

4. Personalized Outreach
- AI-generated email sequences
- Multi-channel coordination
- Human-in-the-loop approval

1.4 Target Market

Primary Market	Secondary	Tertiary
SMBs	**Agencies**	**Enterprise**
Sales teams 5-50 people	Lead gen & marketing	Large sales orgs

Our beachhead market is B2B service providers (agencies, consultants, SaaS companies) with small sales teams who currently spend 40%+ of their time on manual prospecting.

1.5 Business Model

Tapflow operates on a SaaS subscription model with usage-based pricing tiers:

Tier	Price/mo	Leads/mo	Key Features
Starter	$99	500	Basic enrichment, email generation
Growth	$299	2,500	Full enrichment, AI personalization
Scale	$799	10,000	API access, white-label, multi-user
Enterprise	Custom	Unlimited	Dedicated support, custom integrations

1.6 Financial Highlights

Year 1 Revenue	Year 3 Revenue	Gross Margin	Break-even
\$240K	**\$3.6M**	**55%**	**Month 14**
Target	Target	At scale	Projected

Key Assumptions:
- Average Revenue Per User (ARPU): $200/month
- Customer Acquisition Cost (CAC): $400

- Lifetime Value (LTV): $2,400 (12-month average retention)
- LTV:CAC Ratio: 6:1

1.7 Funding Requirements

Seed Round: \$500,000

Use of Funds (18-month runway):
- Product Development (50%): $250,000
- Go-to-Market (30%): $150,000
- Operations & Legal (15%): $75,000
- Reserve (5%): $25,000

Milestones to Achieve:
- MVP launch and 100 paying customers
- $20K+ MRR
- Product-market fit validation
- Series A readiness

1.8 The Team

Founder & CEO: Marb (Placeholder for full bio)
- Background in AI/ML and sales technology
- Previously built and exited [relevant experience]
- Deep expertise in agent orchestration and automation

Advisors: [To be added as recruited]

1.9 Why Now?

Three converging trends make this the optimal time for Tapflow:

1. **AI Capability Inflection:** Large language models (Claude, GPT-4) have reached the capability threshold for reliable autonomous research and writing.

2. **Market Fatigue with Point Solutions:** Sales teams are exhausted managing 5-10 tools for prospecting, enrichment, and outreach. Consolidation demand is high.

3. **Competitive Opening:** Market leader Clay is priced for enterprise ($720+/mo). There's a massive underserved SMB segment ready for an affordable alternative.

2 Company Description

2.1 Legal Structure

Company Name: Tapflow, Inc.

Incorporation: Delaware C-Corporation (recommended for VC compatibility)

Headquarters: Salt Lake City, Utah

Status: Pre-seed / Formation stage

The Delaware C-Corp structure provides:
- Standard VC-compatible equity framework
- Established corporate law precedents
- Flexibility for future fundraising rounds
- Clean cap table management

2.2 Founding Team

2.2.1 Marb — Founder & CEO

[Full bio to be added]

Key qualifications:
- Technical background with hands-on AI/ML experience
- Experience building and scaling sales pipelines
- Deep understanding of the lead generation market
- Built functioning prototype demonstrating core technology

2.2.2 Open Roles (Post-Funding)

- **CTO / Technical Co-founder:** Lead product development
- **Head of Growth:** Own customer acquisition and marketing
- **Senior Full-Stack Engineer:** Build core platform

2.3 Company History & Stage

2.3.1 Origin Story

Tapflow originated from solving a real problem: manually prospecting for a local service business in Salt Lake City. After spending dozens of hours on repetitive research, the founder built an automated pipeline using AI agents to:

1. Discover businesses via Google Maps and Yelp

2. Analyze their websites for quality and technology
3. Find decision-maker contact information
4. Generate personalized outreach emails

This internal tool—codenamed "slc-lead-gen"—proved highly effective, generating qualified leads at a fraction of the time and cost of manual methods. Tapflow is the productized, scalable version of this validated pipeline.

2.3.2 Current Stage

Stage	Pre-seed / MVP Development
Product	Core technology 60-70% complete
Revenue	Pre-revenue (targeting Q2 2026 launch)
Customers	0 (targeting 10 beta customers in Month 1)
Team	1 founder + contractor network
Funding	Bootstrapped to date

2.4 Mission, Vision, and Values

2.4.1 Mission Statement

To democratize enterprise-grade lead generation, making it accessible and affordable for businesses of all sizes through intelligent automation.

2.4.2 Vision Statement

By 2030, Tapflow will be the autonomous sales development platform powering over 10,000 businesses, having eliminated billions of hours of manual prospecting work and generated tens of millions of qualified sales opportunities.

2.4.3 Core Values

🎯 **Outcome Over Output**

We measure success by leads closed, not features shipped. Every decision prioritizes customer results.

🤖 **Automation with Oversight**

AI handles the busywork; humans make the decisions. We enhance salespeople, not replace them.

🔍 **Radical Transparency**

⚡ **Speed to Value**

Show our work. Users see exactly how leads were found, scored, and why emails were written.

First qualified lead within 10 minutes of signup. No setup wizards, no onboarding calls required.

3 Market Analysis

3.1 Industry Overview

The global lead generation market represents one of the largest and most critical segments of the sales technology ecosystem. Every B2B company, regardless of size or industry, requires a consistent pipeline of qualified prospects to survive and grow.

3.1.1 Market Definition

Lead generation encompasses all activities, tools, and services used to identify, attract, and qualify potential customers. This includes:

- **Data Providers:** Companies selling contact and company information
- **Sales Intelligence:** Tools for researching and enriching prospect data
- **Outreach Automation:** Platforms for email, phone, and social selling
- **Prospecting Tools:** Solutions for discovering and qualifying new leads
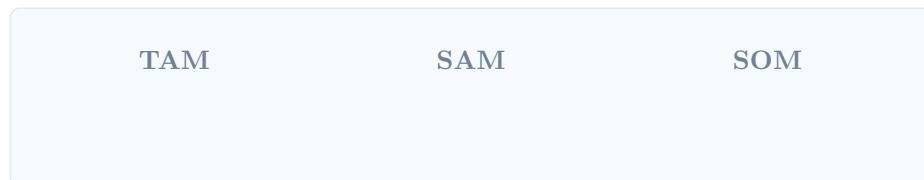
3.1.2 Key Market Segments

Segment	Market Size	Key Players
Sales Intelligence	$3.2B	ZoomInfo, Apollo, Clearbit
Email Outreach	$2.1B	Outreach, Salesloft, Instantly
Data Enrichment	$1.8B	Clay, Clearbit, FullContact
Lead Databases	$2.5B	LinkedIn Sales Nav, Lusha, Hunter
Marketing Automation	$5.8B	HubSpot, Marketo, Pardot

3.2 Market Size

3.2.1 Total Addressable Market (TAM)

The global B2B lead generation market is valued at **$10.2 billion in 2026**, growing at a compound annual growth rate (CAGR) of **12.4%**.

TAM	SAM	SOM

$10.2B $2.4B $48M

Global lead gen market   SMB + Mid-market US   Year 3 target (2% SAM)

3.2.2 Serviceable Addressable Market (SAM)

Tapflow's initial focus on US-based SMBs and mid-market companies using automated prospecting tools represents approximately **$2.4 billion**:

- **SMBs (1-50 employees):** 6.1 million US companies, 15% use paid lead gen tools = 915,000 potential customers
- **Average spend:** $2,600/year on lead generation software
- **SAM calculation:** 915,000 × $2,600 = $2.4B

3.2.3 Serviceable Obtainable Market (SOM)

Year 3 target of 2,000 customers at $2,400 average annual revenue = **$4.8M ARR**, representing 0.2% of SAM. Conservative projection with significant room for expansion.

3.3 Market Trends

3.3.1 Trend 1: AI Transformation of Sales Tech

The Shift: "AI-powered" has moved from marketing buzzword to table-stakes requirement.

Evidence:
- 78% of sales leaders say AI is critical to their 2026 strategy (Gartner)
- Sales AI funding increased 340% from 2023 to 2025
- Every major sales platform now claims AI features

Implication for Tapflow: The market expects AI. Our differentiation must be in **how** we use AI, not **that** we use it. Our agent orchestration architecture provides genuine competitive advantage.

3.3.2 Trend 2: Consolidation Fatigue

Sales teams currently manage an average of 7.3 different tools for prospecting and outreach. This creates:

- **Integration headaches:** Constant data syncing issues
- **Training burden:** New hire ramp time extended

- **Cost creep:** Multiple subscriptions adding up
- **Data silos:** Incomplete view of prospect journey

Tapflow Opportunity: Offer an integrated solution that replaces 3-5 point tools.

3.3.3 Trend 3: Privacy Regulation Pressure

GDPR, CCPA, and emerging state privacy laws are constraining traditional lead generation methods:

- Cold outreach requires more careful targeting
- Data quality matters more than volume
- "Spray and pray" becoming legally risky

Tapflow Opportunity: Our qualification-first approach ensures only relevant, likely-to-respond prospects receive outreach.

3.3.4 Trend 4: SMB Tool Democratization

Enterprise-grade capabilities are becoming accessible to smaller companies:

- Cloud infrastructure eliminates upfront costs
- AI APIs enable sophisticated features without ML teams
- No-code/low-code reduces development requirements

Tapflow Opportunity: Deliver Fortune 500 lead gen capabilities at SMB price points.

3.4 Competitive Analysis

3.4.1 Competitive Landscape Overview

	Prospecting	Enrichment	Personalization	Outreach	Automation
Clay	❌	✅✅✅	✅✅	❌	✅
Apollo	✅✅	✅✅	✅	✅✅	✅
Instantly	❌	❌	✅	✅✅✅	✅
Lemlist	✅	✅	✅✅	✅✅	✅
Hunter	✅	✅✅	❌	❌	❌
Tapflow	✅✅✅	✅✅	✅✅✅	✅✅	✅✅✅

Table 1: Competitive Feature Matrix — ❌ None, ✅ Basic, ✅✅ Good, ✅✅✅ Excellent

3.4.2 Key Competitor Deep-Dive

3.4.2.1 Clay — Closest Competitor

What they do: Enrichment orchestration platform with 150+ data providers and AI agent ("Claygent")

Pricing: $134 - $720+/month (credit-based)

Strengths:
- Massive data provider network
- Trusted by Anthropic, OpenAI, Ramp
- SOC 2 Type II compliant
- Strong brand in sales tech community

Weaknesses:
- Complex workflow builder (steep learning curve)
- No built-in prospecting (requires existing lists)
- Expensive for SMBs
- Credit model punishes scale

Our Positioning: "Clay makes you build workflows. Tapflow just finds leads."

3.4.2.2 Apollo.io — Sales Intelligence Leader

What they do: 275M+ contact database with email sequencing

Pricing: $49 - $149/user/month

Strengths:
- Massive verified contact database
- Built-in email sequences
- Good API access

Weaknesses:
- Per-seat pricing kills team scaling
- "AI" is basic templating, not research
- Manual list building required

Our Positioning: "Apollo's AI is search filters. Ours actually researches."

3.4.2.3 Instantly.ai — Cold Email Champion

What they do: Email sending at scale with unlimited accounts and warmup

Pricing: $37 - $97/month

Strengths:
- Unlimited email accounts

- Best-in-class deliverability
- Simple, affordable pricing

Weaknesses:
- No prospecting—bring your own leads
- Limited personalization
- Single channel (email only)

Our Positioning: "Instantly sends emails. We create the emails worth sending."

3.4.3 Competitive Moat

Tapflow's sustainable competitive advantages:

1. Agent Orchestration IP

Our multi-agent architecture (discovery, research, qualification, content) is complex to replicate. It's not just prompts—it's the coordination layer.

2. End-to-End Integration

Competitors optimize for one stage. We optimize for the complete journey, enabling cross-stage intelligence.

3. SMB Price Point

At $99/mo entry, we're 3-7× cheaper than comparable capabilities from Clay or Apollo.

4. Speed to Value
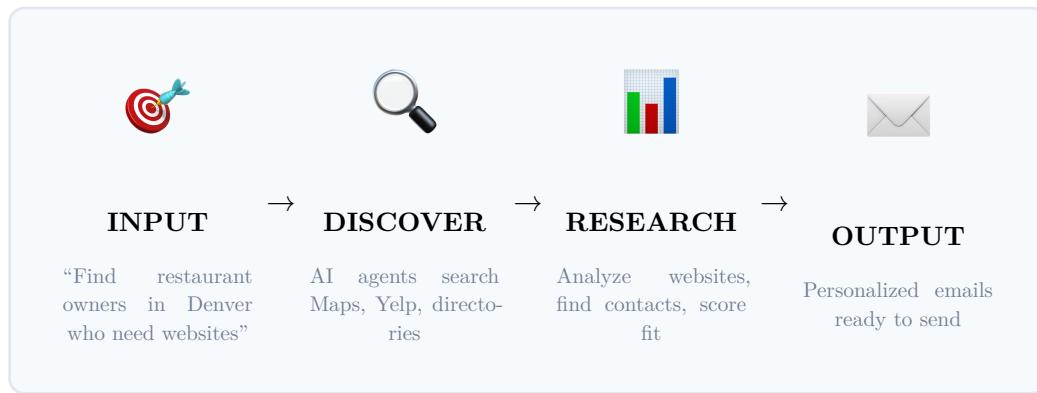
Competitors require hours of setup. Tapflow delivers first leads in minutes.

4 Products and Services

4.1 Core Product Description

Tapflow is an AI-powered lead generation platform that automates the complete prospecting pipeline—from identifying target businesses to delivering ready-to-send personalized outreach.

4.1.1 How It Works

INPUT → **DISCOVER** → **RESEARCH** → **OUTPUT**

"Find restaurant owners in Denver who need websites"

AI agents search Maps, Yelp, directories

Analyze websites, find contacts, score fit

Personalized emails ready to send

4.1.2 The User Experience

1. **Create Campaign:** User enters natural language description of ideal customer
2. **AI Processing:** Platform autonomously discovers, researches, and qualifies prospects
3. **Review Queue:** Qualified leads appear with AI-generated personalized emails
4. **Approve & Send:** User reviews, optionally edits, and sends with one click
5. **Track Results:** Dashboard shows opens, replies, and conversion metrics

4.2 Key Features

4.2.1 Feature 1: Intelligent Prospecting Engine

Capability	Description
Natural Language Input	Describe your ideal customer in plain English—no filters or boolean required
Multi-Source Discovery	Simultaneously searches Google Maps, Yelp, industry directories, and more
Geographic Targeting	City, state, zip code, or radius-based search

| Industry Classification | Automatic categorization using business descriptions and reviews |
| Deduplication | Intelligent matching prevents duplicate prospects across sources |

4.2.2 Feature 2: AI Research & Enrichment

Our research agents analyze each prospect to gather intelligence that enables personalization:

- **Website Analysis:**
  ‣ Performance scores (Lighthouse-based)
  ‣ Mobile responsiveness rating
  ‣ Technology stack detection
  ‣ Content quality assessment

- **Contact Discovery:**
  ‣ Decision-maker identification
  ‣ Email finding and verification
  ‣ LinkedIn profile matching
  ‣ Direct phone numbers (when available)

- **Business Intelligence:**
  ‣ Employee count estimates
  ‣ Revenue indicators
  ‣ Years in business
  ‣ Recent news/changes

4.2.3 Feature 3: Automated Lead Scoring

Every prospect receives a score (0-100) and tier assignment (A/B/C):

Tier	Score Range	Characteristics
A	80-100	Perfect ICP fit, verified contact, high likelihood to respond
B	50-79	Good fit with some uncertainty, needs additional validation
C	0-49	Marginal fit, pursue only if capacity allows

Scoring factors include:
- Website quality relative to competitors
- Review sentiment and volume

- Business age and stability indicators
- Contact verification confidence
- Match to stated ICP criteria

4.2.4 Feature 4: AI-Powered Email Generation

Our content agent writes personalized email sequences that feel human-crafted:

> **Example Output:**
>
> *Subject: Quick thought on Bella Italia's website*
>
> *Hey Marco,*
>
> *I was checking out Bella Italia's reviews—congrats on the 4.8 stars! Customers love the authentic pasta recipes.*
>
> *One thing I noticed: your website doesn't show up well on mobile. Given that 70% of restaurant searches happen on phones, you might be missing reservations.*
>
> *Would you be open to a quick call about a mobile-friendly redesign? I've helped three Italian restaurants in Denver boost their online reservations by 40%+.*
>
> *Best, [Signature]*
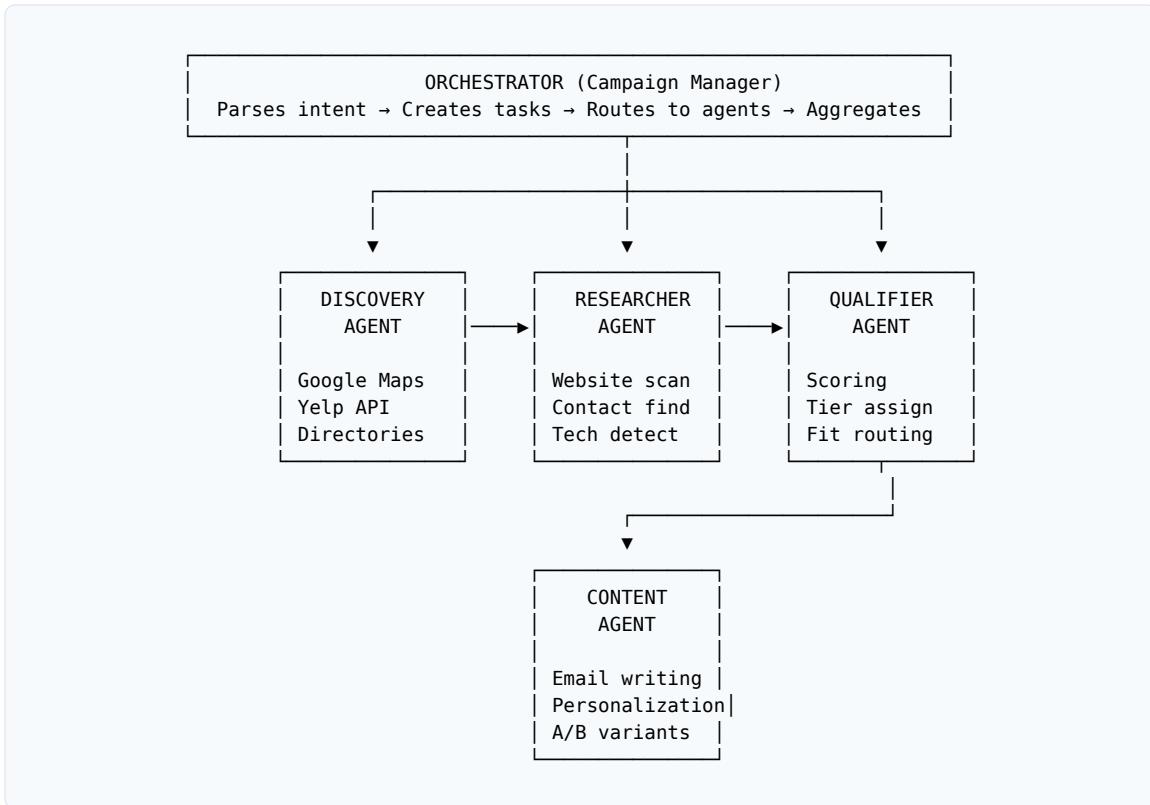
Every email includes:
- Personalized opening based on research
- Specific pain point identification
- Value proposition tailored to their situation
- Clear, low-friction call-to-action

4.3 Technology & Intellectual Property

4.3.1 Agent Orchestration Architecture

Tapflow's core IP is our **multi-agent orchestration layer**—a proprietary system for coordinating specialized AI agents to complete complex, multi-step tasks.

```
  ┌─────────────────────────────────────────────────────┐
  │            ORCHESTRATOR (Campaign Manager)            │
  │ Parses intent → Creates tasks → Routes to agents → Aggregates │
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  │  DISCOVERY   │  │  RESEARCHER  │  │  QUALIFIER   │
  │    AGENT     │─▶│    AGENT     │─▶│    AGENT     │
  │              │  │              │  │              │
  │ Google Maps  │  │ Website scan │  │ Scoring      │
  │ Yelp API     │  │ Contact find │  │ Tier assign  │
  │ Directories  │  │ Tech detect  │  │ Fit routing  │
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                │   CONTENT    │
                │    AGENT     │
                │              │
                │ Email writing │
                │ Personalization│
                │ A/B variants  │
                └──────────────┘
```

Listing 1: Tapflow Agent Orchestration Architecture

4.3.2 Why This Matters

Most "AI" lead generation tools are simple LLM wrappers—they call an API with a prompt and return the result. Tapflow's architecture enables:

1. **Specialization:** Each agent is optimized for a specific task with custom prompts, context, and tools
2. **Coordination:** Agents share information and build on each other's work
3. **Reliability:** Individual agent failures don't break the pipeline; graceful degradation
4. **Scalability:** Agents can run in parallel for high-volume processing
5. **Improvement:** Each agent can be independently tuned without affecting others

4.3.3 Technology Stack

Layer	Technology	Rationale
Frontend	Next.js 14 + Tailwind CSS	Fast, modern, excellent developer experience
Backend	Next.js API Routes + Inngest	Serverless, scalable, minimal ops overhead

Database	Supabase (PostgreSQL)	Managed, real-time subscriptions, auth built-in
AI Engine	Claude API (Sonnet)	Best-in-class for writing and reasoning
Job Queue	Inngest/Trigger.dev	Serverless-native background job processing
Hosting	Vercel	Zero-config deployments, edge functions
Payments	Stripe	Industry standard, usage-based billing support

4.4 Product Roadmap

4.4.1 MVP (V1.0) — Target: Q2 2026

Core Features — 6 Week Build

- User authentication and team management
- Campaign creation with natural language input
- Google Maps + Yelp prospecting
- Basic enrichment (website scoring, contact finding)
- AI email sequence generation
- Lead list view with export
- Stripe subscription billing

4.4.2 V1.1 — Target: Q3 2026

- Instantly.ai integration for email sending
- Hunter.io email verification
- A/B/C tier scoring algorithm
- HubSpot CRM export
- Multi-user team features

4.4.3 V2.0 — Target: Q4 2026

- LinkedIn automation (InMail, connections)
- Voice AI outreach (Vapi integration)
- Demo site generation for prospects
- API access for developers

- White-label capabilities

4.4.4 V3.0 — Target: 2027

- Self-optimizing campaigns (learn from results)
- Multi-language support (EU expansion)
- Industry-specific templates and agents
- Enterprise SSO and compliance features
- Custom AI model training per account

5 Marketing and Sales Strategy

5.1 Go-to-Market Plan

Tapflow's GTM strategy follows a **concentric expansion model**—starting with a focused beachhead market and expanding outward as we prove product-market fit.

5.1.1 Phase 1: Dogfooding (Weeks 1-4)

> **Use the Product to Sell the Product**
>
> **Strategy:** Deploy Tapflow to find our own first customers.
>
> **Execution:**
> 1. Build MVP targeting web design and marketing agencies
> 2. Use Tapflow to discover 100 agencies in Utah
> 3. Send Tapflow-generated outreach offering free 30-day pilot
> 4. Close 10 beta customers for validation and feedback
>
> **Why this works:** Proves the product while acquiring customers. Zero CAC for first cohort.

5.1.2 Phase 2: Content + Launch (Weeks 5-8)

- **ProductHunt Launch:** Position as "True AI Lead Gen" with live demo
- **Comparison Content:** "Clay vs Tapflow", "The Complete Apollo Alternative"
- **Demo Videos:** Show agent orchestration in action (differentiator visualization)
- **SEO Foundation:** Target keywords: "ai lead generation", "automated prospecting", "clay alternative"

5.1.3 Phase 3: Paid Acquisition + Partnerships (Weeks 9-16)

- **Google Ads:** Competitor brand terms, high-intent keywords
- **LinkedIn Ads:** B2B targeting by job title and company size
- **Partner Program:** CRM consultants, sales trainers, agency owners
- **Integration Marketing:** Zapier, Make, HubSpot app marketplace

5.2 Customer Acquisition Channels

Channel	CAC Est.	Volume	Timeline
Organic/SEO	$50	Medium	6-12 months to scale
ProductHunt	$0	Burst	One-time launch spike

Google Ads	$200-400	High	Immediate, scalable
LinkedIn Ads	$300-500	Medium	Good for B2B targeting
Partnerships	$100-200	Medium	3-6 months to establish
Referral Program	$100	Medium	Grows with customer base
Content Marketing	$75	High	6+ months to compound

5.2.1 Channel Strategy by Stage

Year 1: Heavy investment in content (SEO foundation) + paid acquisition (immediate revenue)

Year 2: Reduce paid spend as organic grows; invest in partnerships and referrals

Year 3: Majority organic/referral; paid for new market entry only

5.3 Pricing Strategy

5.3.1 Pricing Philosophy

Our pricing follows three principles:

1. **Undercut Clay:** Entry price 26% lower than Clay's cheapest paid tier
2. **Value-Based Tiers:** Each tier unlocks meaningful new capabilities
3. **Predictable for Customers:** Avoid confusing credit systems

5.3.2 Pricing Tiers

Tier	Price	Leads/mo	Key Features
Starter	$99/mo	500	Basic enrichment, email generation, CSV export
Growth ⭐	$299/mo	2,500	Full enrichment, AI personalization, Instantly integration
Scale	$799/mo	10,000	API access, white-label, 5 team seats, priority support
Enterprise	Custom	Unlimited	Dedicated infrastructure, custom integrations, SLA

Table 2: Tapflow Pricing Tiers

5.3.3 Competitive Pricing Position

Capability Level	Tapflow	Clay	Savings
Entry (basic)	$99	$134	26%
Mid-tier	$299	$314	5%
Full-featured	$799	$720+	Comparable

Note: Tapflow includes prospecting; Clay requires existing lists

5.3.4 Add-On Revenue Opportunities

- **Overage leads:** $0.15/lead (Starter), $0.10/lead (Growth), $0.06/lead (Scale)
- **Dedicated sending IP:** $50/mo
- **LinkedIn automation:** $49/mo add-on
- **Voice AI outreach:** $0.15/minute
- **Custom integrations:** Professional services

5.4 Sales Process

5.4.1 Self-Serve (80% of customers)

1. Discover   **2. Trial**   **3. Convert**   **4. Expand**

SEO, ads, referral → land-ing page	Free trial with 50 leads	Self-serve checkout	Upgrade prompts, add-ons

5.4.2 Sales-Assisted (20% of customers — Scale/Enterprise)

- Inbound demo request form
- 30-minute discovery call
- Custom proposal and pricing
- Pilot program (30-60 days)
- Contract and onboarding

5.5 Target Customer Profiles

5.5.1 ICP 1: Solo Consultant / Freelancer

Pain	Spends hours on manual prospecting; can't afford enterprise tools
Budget	$100-300/mo for sales tools
Channels	Twitter, LinkedIn, IndieHackers, Product Hunt
Message	"Find qualified leads while you sleep"
Tier	Starter ($99/mo)

5.5.2 ICP 2: SMB Sales Team (5-20 people)

Pain	SDRs waste time on low-quality leads; need scale without headcount
Budget	$500-1,500/mo for lead gen stack
Channels	LinkedIn Ads, G2, sales podcasts, webinars
Message	"Give your SDRs qualified leads, not busywork"
Tier	Growth ($299/mo) or Scale ($799/mo)

5.5.3 ICP 3: Lead Generation Agency

Pain	Margins shrinking; needs automation to stay competitive

Budget	$1,000-5,000/mo for infrastructure
Channels	Agency communities, conferences, referrals
Message	"White-label AI lead gen for your clients"
Tier	Scale ($799/mo) with white-label add-on

5.6 Partnership Strategy

5.6.1 Integration Partners

- **CRM vendors:** HubSpot, Salesforce, Pipedrive app marketplaces
- **Email platforms:** Instantly, Lemlist, Smartlead
- **Automation tools:** Zapier, Make, n8n

5.6.2 Channel Partners

- **CRM consultants:** Referral fees for customer introductions
- **Sales trainers:** Bundle Tapflow with training programs
- **Agency networks:** Bulk licensing for agency consortiums
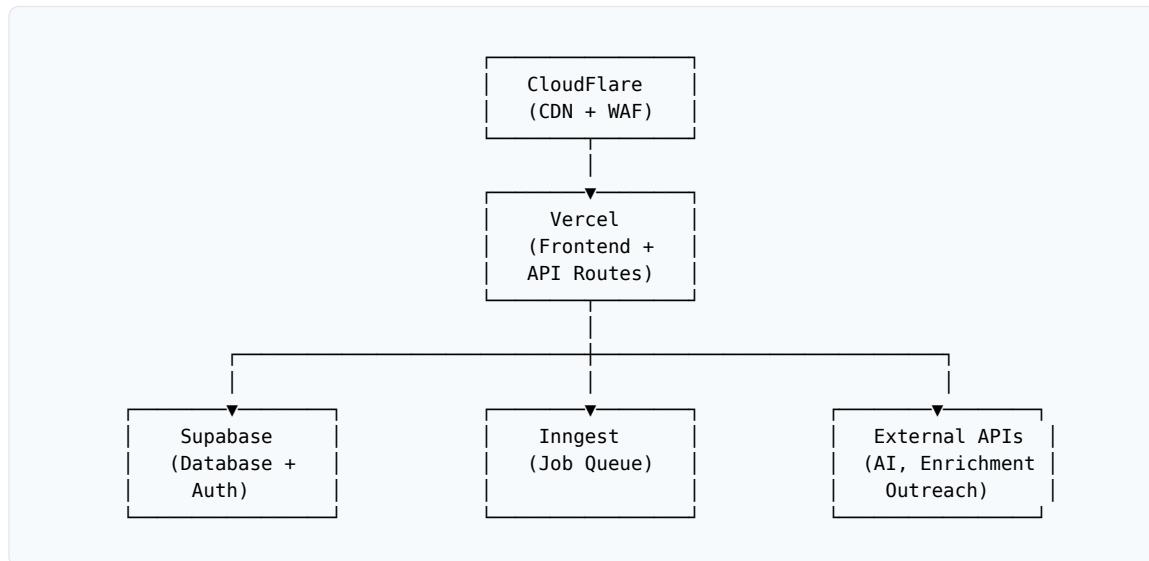
5.6.3 Technology Partners

- **AI providers:** Anthropic, OpenAI for enterprise-grade AI
- **Data providers:** Apollo, Hunter, Clearbit for enrichment

6 Operations Plan

6.1 Technology Infrastructure

6.1.1 Production Architecture

```
                    +----------------+
                    |   CloudFlare   |
                    |  (CDN + WAF)   |
                    +----------------+
                            |
                            v
                    +----------------+
                    |     Vercel     |
                    |  (Frontend +   |
                    |   API Routes)  |
                    +----------------+
                            |
         +------------------+------------------+
         |                  |                  |
         v                  v                  v
  +--------------+  +--------------+  +-----------------+
  |   Supabase   |  |   Inngest    |  |  External APIs  |
  | (Database +  |  | (Job Queue)  |  | (AI, Enrichment |
  |    Auth)     |  |              |  |    Outreach)    |
  +--------------+  +--------------+  +-----------------+
```

Listing 2: Production Infrastructure Overview

6.1.2 Technology Choices Rationale

Component	Choice	Why
Hosting	Vercel	Zero-ops, auto-scaling, generous free tier
Database	Supabase	Managed Postgres, real-time, auth included
Queue	Inngest	Serverless-native, no Redis to manage
AI	Claude (Anthropic)	Best for writing quality, fast, reliable API
Payments	Stripe	Industry standard, usage billing support
Monitoring	Vercel Analytics + Sentry	Built-in + error tracking

6.1.3 Scalability Considerations

Current design supports:
- 10,000+ concurrent users
- 1M+ leads processed per month
- 99.9% uptime target

Scaling triggers and responses:

Trigger	Threshold	Action
Database load	80% CPU	Upgrade Supabase tier / add read replicas
API latency	>500ms p95	Add edge caching / optimize queries
Queue depth	>10K pending	Scale Inngest workers / add priority queues
AI costs	>20% revenue	Implement caching / model optimization

6.2 Development Timeline

6.2.1 MVP Development (6 Weeks)

Week	Deliverables	Effort
1	Project setup, auth flow, database schema	40 hrs
2	Campaign creation UI, lead discovery integration	40 hrs
3	Enrichment pipeline, website scoring	40 hrs
4	Lead list view, filtering, export	40 hrs
5	AI email generation, sequence builder	40 hrs
6	Stripe integration, dashboard, testing	40 hrs

Total MVP Effort: 240 hours (6 weeks full-time)

6.2.2 Post-MVP Roadmap

Phase	Features	Timeline
V1.1	Email verification, CRM export, team features	+4 weeks
V1.2	Instantly integration, advanced scoring	+4 weeks
V2.0	LinkedIn automation, API access, white-label	+8 weeks
V3.0	Self-optimizing campaigns, enterprise features	+12 weeks

6.3 Key Milestones

Date	Milestone	Success Metric
Q1 2026	Seed funding closed	$500K raised
Q2 2026	MVP launch + beta customers	10 paying customers
Q2 2026	ProductHunt launch	Top 5 of the day
Q3 2026	Product-market fit validation	100 customers, $15K MRR
Q4 2026	V2.0 with API/white-label	25 agency customers
Q1 2027	Break-even achieved	Cash flow positive
Q2 2027	Series A readiness	$50K MRR, 500 customers

Table 3: Key Milestones and Success Metrics

6.4 Team Structure

6.4.1 Current Team

- **Founder/CEO:** Marb — Product vision, sales, operations

6.4.2 Hiring Plan (Post-Funding)

Role	Timing	Comp Range	Priority Focus
Full-Stack Engineer	Month 1	$120-150K	Core product development
Growth Marketer	Month 3	$80-100K	Customer acquisition, content
Customer Success	Month 6	$60-80K	Onboarding, retention
Second Engineer	Month 9	$100-130K	Scale and integrations

6.4.3 Advisory Board (To Recruit)

- Sales technology executive (GTM expertise)
- SaaS founder with exit experience
- AI/ML technical advisor

6.5 Operational Processes

6.5.1 Customer Support

Tier 1 (Self-Serve):
- Knowledge base / FAQ
- In-app chat (Intercom)
- Email support (24-hour response SLA)

Tier 2 (Growth+):
- Priority email support (4-hour response SLA)
- Scheduled onboarding calls

Tier 3 (Enterprise):
- Dedicated account manager
- Slack/Teams channel
- Quarterly business reviews

6.5.2 Quality Assurance

- Automated testing (unit + integration)
- Staging environment for all changes
- Feature flags for gradual rollout
- Error monitoring (Sentry)
- Weekly metrics review

6.5.3 Security & Compliance

- SOC 2 Type I target (Year 1)
- GDPR compliance for EU expansion
- Regular security audits
- Encrypted data at rest and in transit
- RBAC for team permissions

7 Financial Projections

7.1 Revenue Model

Tapflow generates revenue through:
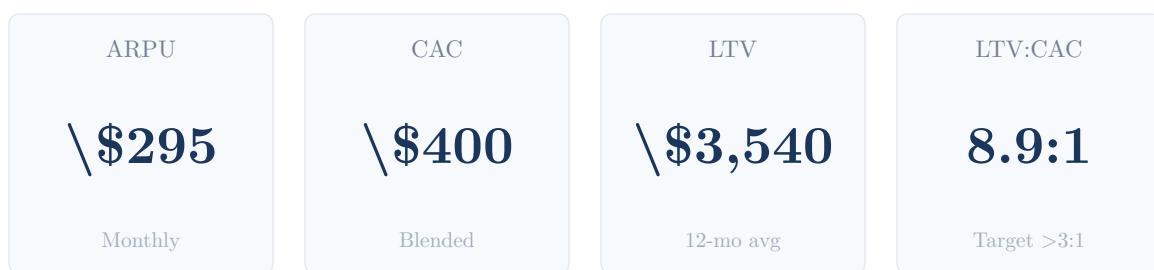
1. **Subscription Revenue (90%):** Monthly/annual SaaS subscriptions
2. **Overage Revenue (7%):** Additional leads beyond plan limits
3. **Add-On Revenue (3%):** Premium features (white-label, integrations)

7.2 Pricing and Unit Economics

7.2.1 Revenue Per Customer

Tier	Monthly	Annual	% of Customers	Weighted MRR
Starter	$99	$1,188	50%	$49.50
Growth	$299	$3,588	35%	$104.65
Scale	$799	$9,588	12%	$95.88
Enterprise	$1,500	$18,000	3%	$45.00
Blended ARPU				**$295/mo**

7.2.2 Unit Economics

ARPU	CAC	LTV	LTV:CAC
\$295	\$400	\$3,540	8.9:1
Monthly	Blended	12-mo avg	Target >3:1

Key assumptions:
- Customer lifetime: 12 months average (conservative)
- Gross margin: 55% (after API costs)
- CAC payback: 2.3 months

7.2.3 Cost Structure (Per Lead)

Cost Component	Starter	Growth	Scale
Discovery APIs	$0.02	$0.02	$0.01
Enrichment APIs	$0.04	$0.03	$0.02
AI (Claude)	$0.02	$0.02	$0.01
Infrastructure	$0.01	$0.01	$0.01
Total Cost/Lead	**$0.09**	**$0.08**	**$0.05**
Revenue/Lead	**$0.20**	**$0.12**	**$0.08**
Gross Margin	**55%**	**33%**	**38%**

7.3 Three-Year Financial Projections

7.3.1 Revenue Projections

Metric	Year 1	Year 2	Year 3
Ending Customers	100	500	2,000
Avg. MRR/Customer	$200	$250	$300
Ending MRR	$20K	$125K	$600K
Annual Revenue	**$120K**	**$900K**	**$4.8M**
YoY Growth	—	650%	433%

Table 4: Revenue Projections (Conservative Scenario)

7.3.2 Customer Growth Model

Quarter	New Customers	Churned	Net Customers
Q2 Y1	15	0	15
Q3 Y1	25	2	38

Q4 Y1	40	4	74
Q1 Y2	50	7	117
... Q4 Y2	100	20	500
... Q4 Y3	400	80	2,000

Assumptions:
- 8% monthly churn Year 1, improving to 5% by Year 3
- 60% organic acquisition by Year 3
- Net revenue retention: 110% (upgrades offset some churn)

7.3.3 Expense Projections

Category	Year 1	Year 2	Year 3
Personnel	$180K	$450K	$1.2M
API/Infrastructure	$24K	$120K	$480K
Marketing/Sales	$60K	$180K	$600K
G&A/Legal	$36K	$90K	$180K
Total Expenses	**$300K**	**$840K**	**$2.46M**

Table 5: Operating Expense Projections

7.3.4 Profitability Path

Metric	Year 1	Year 2	Year 3
Revenue	$120K	$900K	$4.8M
Gross Profit (55%)	$66K	$495K	$2.64M
Operating Expenses	$300K	$840K	$2.46M
EBITDA	**($234K)**	**($345K)**	**$180K**
EBITDA Margin	**(195%)**	**(38%)**	**3.8%**

Table 6: Path to Profitability

7.4 Break-Even Analysis

Break-Even Point

Monthly Break-Even: $55,000 MRR

Calculation:
- Monthly fixed costs (post-MVP): $30,000
- Gross margin: 55%
- Break-even MRR = $30,000 ÷ 0.55 = $54,545

Customer Count: 185 customers at blended ARPU of $295

Expected Timeline: Month 14-16 (mid-Year 2)

7.5 Key Financial Assumptions

Assumption	Value	Basis
Blended ARPU	$295/mo	Weighted average of tier distribution
Monthly Churn	8% → 5%	Industry average, improving with NPS
CAC	$400	Blended across channels
Gross Margin	55%	API costs at scale + infrastructure
Sales Cycle	7 days	Self-serve with free trial
Annual Contract %	30%	Discount incentive for annual

7.6 Sensitivity Analysis

Scenario	Y3 Revenue	Y3 EBITDA	Key Driver
Base Case	$4.8M	$180K	100 new customers/mo by Y3
Conservative (-30%)	$3.4M	($120K)	70 new customers/mo

Optimistic (+30%)	$6.2M	$620K	130 new customers/mo
High Churn (10%)	$3.8M	($60K)	Retention issues
Low CAC ($300)	$4.8M	$420K	Strong organic/ referral

8 Funding Requirements

8.1 Investment Ask

Seed Round: \\$500,000

Structure: SAFE or Priced Equity Round

Valuation: $4M pre-money (target)

Dilution: 11%

Runway: 18 months to key milestones

8.2 Use of Funds

Category	Amount	Details
Product Development	$250K	2 engineers (12 mo), infrastructure, tools
Go-to-Market	$150K	Marketing hire, paid acquisition, content
Operations & Legal	$75K	Incorporation, accounting, compliance
Reserve	$25K	Contingency buffer
Total	**$500K**	

Table 7: Use of Funds Breakdown

Product: 50% GTM: 30% Ops: 15% Reserve: 5%
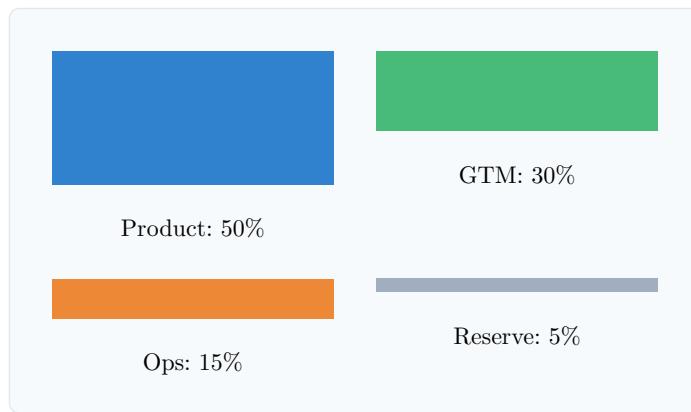
Figure 1: Fund Allocation Visualization

8.3 Milestones to Achieve

With this funding, Tapflow will accomplish:

Month	Milestone	Success Metric
3	MVP Launch	Product live, 10 beta customers
6	Product-Market Fit Signals	50 paying customers, $10K MRR
9	Growth Engine Working	100 customers, $25K MRR, CAC < $500
12	V2.0 with API	200 customers, $40K MRR
15	Series A Ready	300+ customers, $60K+ MRR, clear PMF

8.4 Series A Positioning

At the end of seed runway, Tapflow will be positioned for a $3-5M Series A with:

- **Revenue:** $60K+ MRR ($720K ARR run rate)
- **Customers:** 300+ paying accounts
- **Metrics:** LTV:CAC > 5:1, Net Revenue Retention > 100%
- **Product:** V2.0 with API, white-label, multi-channel

Series A Use: Scale team to 15+, expand to international markets, accelerate enterprise sales.

8.5 Investment Terms (Proposed)

Term	Proposed
Instrument	SAFE (Post-Money) or Priced Seed
Amount	$500,000
Valuation Cap	$4,000,000
Discount	20% (if SAFE)
Pro-Rata Rights	Yes

Board Seat	Observer seat
Information Rights	Quarterly updates

8.6 Investor Value-Add

Seeking investors who can provide:

1. **GTM Expertise:** Experience scaling SaaS from $0 to $10M ARR
2. **Sales Tech Network:** Introductions to potential customers and partners
3. **Talent Access:** Help recruiting technical and GTM leaders
4. **Operational Support:** Guidance on pricing, expansion, fundraising

9 Risk Analysis

9.1 Key Risks and Mitigation Strategies

9.1.1 Market Risks

Risk	Impact	Mitigation
Market saturation	Difficulty differentiating	Focus on end-to-end automation as key differentiator; target underserved SMB segment
Economic downturn	Reduced sales tech budgets	Position as cost-saving (replaces multiple tools); emphasize ROI and payback period
Competitor response	Clay or Apollo copy features	Build moat through agent IP and customer relationships; stay 6-12 months ahead on roadmap

9.1.2 Technology Risks

Risk	Impact	Mitigation
AI API reliability	Service disruptions	Multi-provider fallback (Claude → GPT-4); queue-based architecture for graceful degradation
API cost increases	Margin compression	Implement aggressive caching; negotiate volume discounts; develop fallback models
Data source changes	Prospecting disruption	Diversify across 5+ sources; build scraping redundancy; maintain source monitoring

9.1.3 Operational Risks

Risk	Impact	Mitigation
Key person risk	Single founder dependency	Document all processes; prioritize technical co-founder hire; build advisory support
Hiring challenges	Slower development	Competitive compensation; remote-friendly; strong mission narrative
Customer churn	Revenue loss	Invest in customer success from day 1; build switching costs through integrations

9.1.4 Regulatory Risks

Risk	Impact	Mitigation
Email regulations	Stricter anti-spam laws	Human-in-the-loop approval; quality over quantity approach; compliance documentation
Data privacy (GDPR)	EU market restrictions	Build privacy-first from start; data minimization; clear consent flows
AI regulation	New compliance requirements	Monitor regulatory landscape; maintain transparency in AI use

9.2 Risk Probability and Impact Matrix

Risk	Probability	Impact	Priority
Competitor response	High	Medium	🔴 High
AI API cost increase	Medium	High	🔴 High
Customer churn	Medium	Medium	🟡 Medium
Key person risk	Medium	High	🟡 Medium
Economic downturn	Low	High	🟡 Medium
Regulatory changes	Low	Medium	🟢 Low

Table 8: Risk Priority Matrix

9.3 Contingency Plans

9.3.1 Scenario: Slower Growth Than Projected

Trigger: Fewer than 50 customers by Month 6

Response:
- Reduce burn by 40% (pause non-essential hires)
- Double down on product-led growth
- Pivot to specific vertical with highest conversion
- Extend runway to 24+ months

9.3.2 Scenario: Major Competitor Entry

Trigger: Clay, Apollo, or new entrant launches similar product

Response:
- Accelerate differentiation features
- Lock in annual contracts with discounts
- Focus on customer success and retention
- Consider strategic acquisition discussions

9.3.3 Scenario: AI API Disruption

Trigger: Anthropic/OpenAI pricing 3x+ or reliability issues

Response:
- Activate multi-provider fallback

- Evaluate open-source model deployment
- Adjust pricing to maintain margins
- Communicate transparently with customers

10 Appendix

10.1 A. Detailed Financial Tables

10.1.1 Monthly Cash Flow Projection (Year 1)

Month	1	3	6	9	12	Total
Revenue	$0	$1.5K	$7.5K	$15K	$20K	$120K
COGS	$0	$0.7K	$3.4K	$6.8K	$9K	$54K
Gross Profit	$0	$0.8K	$4.1K	$8.2K	$11K	$66K
Personnel	$12K	$15K	$15K	$18K	$18K	$180K
Marketing	$2K	$5K	$6K	$6K	$6K	$60K
Other	$2K	$3K	$3K	$3K	$3K	$36K
Net Cash	($16K)	($22K)	($20K)	($19K)	($16K)	($210K)
Cum. Cash	$484K	$438K	$376K	$323K	$290K	

Table 9: Year 1 Monthly Cash Flow (Selected Months)

10.1.2 Customer Acquisition Cost Breakdown

Channel	Spend/Mo	Customers	CAC
Google Ads	$3,000	10	$300
LinkedIn Ads	$2,000	4	$500
Content/SEO	$1,000	6	$167
Referrals	$500	4	$125
Blended	$6,500	24	$271

10.2 B. Competitive Feature Matrix

Feature	Tapflow	Clay	Apollo	In-stantly	Hunter	Lemlist
Auto Prospecting	✅	❌	✅	❌	✅	✅
Multi-Source	✅	✅	❌	❌	❌	❌
AI Enrichment	✅	✅	✅	❌	✅	✅
Lead Scoring	✅	✅	✅	❌	❌	❌
AI Email Copy	✅	✅	❌	✅	❌	✅
Email Sending	✅ [*]	❌	✅	✅	❌	✅
LinkedIn	V2	❌	❌	❌	❌	✅
API Access	✅	✅	✅	✅	✅	✅
White-Label	✅	❌	❌	✅	❌	❌
Entry Price	$99	$134	$49 [*]	$37	$34	$55 [*]

Table 10: Competitive Feature Comparison ([*] = per user or via integration)

10.3 C. Technology Architecture Detail

10.3.1 Database Schema (Simplified)

```
-- Core Tables
users (id, email, name, company, created_at)
subscriptions (id, user_id, tier, status, stripe_id)
campaigns (id, user_id, name, target_criteria, status)
prospects (id, campaign_id, company_name, website, source)
contacts (id, prospect_id, name, email, title, verified)
enrichments (id, prospect_id, tech_stack, score, pain_points)
sequences (id, campaign_id, contact_id, emails, status)
analytics (id, sequence_id, opens, clicks, replies)
```

Listing 3: Core Database Tables

10.3.2 API Integration Map

Provider	Purpose	Est. Cost/mo
Google Places	Business discovery	$100-275
Yelp Fusion	Reviews, ratings	$0 (free tier)

Hunter.io	Email verification	$34-209
Apollo.io	Contact enrichment	$49-149
Anthropic (Claude)	AI generation	$100-500
Instantly.ai	Email delivery	$37-97
Stripe	Payments	2.9% + $0.30

10.4 D. Glossary

ARPU	Average Revenue Per User — monthly revenue divided by active customers
CAC	Customer Acquisition Cost — total sales/marketing spend divided by new customers
LTV	Lifetime Value — total revenue expected from a customer over their lifetime
MRR	Monthly Recurring Revenue — predictable monthly subscription revenue
ARR	Annual Recurring Revenue — MRR $\times$ 12
NRR	Net Revenue Retention — revenue retained from existing customers including expansion
ICP	Ideal Customer Profile — description of perfect-fit customer
PMF	Product-Market Fit — evidence that product solves real problem for defined market
SAFE	Simple Agreement for Future Equity — convertible instrument for early-stage funding
SOC 2	Service Organization Control 2 — security compliance certification

10.5 E. Contact Information

Tapflow, Inc.

Founder: Marb
Email: [founder@tapflow.io]
Website: [www.tapflow.io]
Location: Salt Lake City, Utah

For investment inquiries, please contact the founder directly.

This business plan was prepared in January 2026.
All projections are forward-looking and subject to change.