

**Idea and client selection phase**

Before the business plan can be completed, the AI agent carries out the idea and client screening steps:

1. **Extracting the essence of an idea**:
   * The AI analyses the transcript of the conversation or the questionnaire.
2. **Assessment of scientificity (Frascati test)**:
   * The AI checks whether the idea meets the criteria for R&D activities. https://www.oecd.org/en/publications/implementing-the-oecd-frascati-manual\_d686818d-en.html
   * If necessary, suggest how to transform the idea into an appropriate R&D context.
3. **Analysis of newness in the market**:
   * Checks for the existence of similar products using the patent, scientific article and market data databases .
   * If the market is saturated, ways of differentiating are suggested.
4. **Eligibility check of the client (and partner if any)**:
   * SME eligibility is checked in terms of shareholder structure, turnover, number of employees (data from the company, rekvizitai.lt, the system may offer to buy SME declaration from the registry centre and upload it).
   * If there is missing data, the AI agent asks for additional information or documents (profit and loss account, balance sheet, SME declaration).

Only after these steps have been completed, the process of completing the business plan is started.

**✅ Detailed path to completing a business plan (based on Inostarto template)**

**Purpose: The** AI agent automatically populates the entire document based on input, data retrieval and user interaction.

**📋 Recommended sequence for completing a business plan for the AI tool**

| **No.** | **Completes the point** | **Why first / who it helps** |
| --- | --- | --- |
| **1** | **4.4. National and international research** | This is the basis for re-examining the idea according to the Frascati Manual, formulating the scientific problem, hypotheses and applications (4.3 and 3.1). |
| **2** | **4.3 Justification of R&D activities**(4.3.1-4.3.5) | Based on the 4.4 studies, the following are developed: problem, hypothesis, uncertainties, systematic . |
| **3** | **3.1.1 Description of the product, innovativeness** | Using knowledge from from 4.3 (what problems it solves, what technical solutions). |
| **4** | **3.1.2 Level of novelty** | Determined by analysis 4.4 and 3.1.1 on the Oslo Manual scale. The AI agent must justify that the idea is novel at the global level. |
| **5** | **3.1.3 R&D priority and themes** | Assignment to a previously analysed area (4.4, 4.3, 3.1). \*MTEPI priorities and their implementation themes were approved by the Resolution of the Government of the Republic of Lithuania No. 835 of 17 August 2022 "On the Approval of the Concept of Scientific Research and Experimental Development and Innovation (Smart Specialisation)[" https://e-seimas.lrs.lt/portal/legalAct/lt/TAP/b70a8a20e6f511ec896de0b71e988500?jfwid=84nbea4rd](https://e-seimas.lrs.lt/portal/legalAct/lt/TAP/b70a8a20e6f511ec896de0b71e988500?jfwid=84nbea4rd) |
| **6** | **3.1.4 Research directions** | Classification used under 3.1.1 → is chosen in accordance with the Order of the Ministry of Education, Science and Sport of the Republic of Lithuania No V-93 of 6 February 2019 "On the Approval of the Classifications of Scientific Fields and Art Fields[". https://e-seimas.lrs.lt/portal/legalAct/lt/TAD/064e79a22a4f11e9a505bd13c24940c9/ZJMNxsaspI](https://e-seimas.lrs.lt/portal/legalAct/lt/TAD/064e79a22a4f11e9a505bd13c24940c9/ZJMNxsaspI%C2%A0) |
| **7** | **3.1.5 Keywords** | Derived from 3.1.1, 4.4 + 4.3 NLP processing. |
| **8** | **4.5. R&D Activity Plan (RAP)** | Formulate based on 4.3 (how uncertainties will be addressed, hypotheses tested, etc.) + 4.4 (literature) + 4.2 (people). 4.5 and 4.2 are filled in iteratively based on each other's information. The AI agent describes what tasks need to be performed and how many hours will be required to perform them |
| 8.2. | **Completion of Annex 1A** | The AI agent determines which professionals' salaries to use based on the project activity and takes the hourly rate from https://osp.stat.gov.lt/statistiniu-rodikliu-analize#/Jeigu The company employs its own staff according to their direct duties, e.g. computer programmers, the applicant uploads the payroll for the last 6 months for these staff. The AI agent calculates the average. Employer's taxes of 1.77% are added to the indicator, and the holiday rate is 8.63%. Lithuanian bank projected growth in Wages https://www.lb.lt/lt/naujausios-ekonomikos-prognozes  The client uploads commercial offers for services, materials and equipment to on . The AI Agent evaluates which services , materials, equipment are classified as Research activities and which are classified as Experimental Development activities. The agent shall fill in the excel table accordingly.  Takes hours from 4.5 and allocates. |
| **9** | **4.2. Project team** | The AI agent, based on Activity 4.5, will work out what posts will be needed for each activity: what will be done, at what times and how many working hours will be needed. The client will be able to mark which posts are existing and which are planned. The client will also be able to choose how many new employees it plans to recruit for the project. |
| **10** | **4.6. Patenting** | Evaluated after analysis of innovativeness (3.1.1) and literature (4.4). The client indicates whether it intends to invest in patenting. |
| **11** | **4.7. Market readiness of the product** | The customer indicates whether they need these activities. **Market readiness of the product** - understood as the innovative activities carried out after the completion of the R&D activities of the project and before the start of the production of the developed product, which are necessary to prepare the product for sale, e.g. testing and standardisation of the developed product, design of the production capacity, preparation of user instructions, etc. The development of the product design, acquisition of production equipment or tools are not eligible activities. |
| **12** | **4.8. Risks** | Based on the sequence of activities in 4.5 and the uncertainties in 4.3. |
| **13** | **4.1. Project location** | A stand-alone item that can be completed at any time when the address is known. The AI agent assesses the company's place of registration (rekvizitai.lt) and/or business activity (contacts on the company's website). If the activity is carried out in the right territory, it is filled in automatically, if not - the AI agent informs the client and asks what address to write. The AI agent asks whether the activity is carried out in own premises or in rented premises. If rented, it informs that a rental agreement and an extract from the Real Estate Registry Centre with the registered rental agreement will be required. |
| **14** | **4.9. Partnerships** | First, the AI agent asks whether the project will be implemented with a partner during the company's screening phase. If it will be implemented with a partner, the partner is subject to the same screening as the applicant. The client has to define the boundaries of what the applicant will do and what the partner will do. This will also be the basis for the completion of point 4.2, which will list the staff of the applicant and, separately, the partner. This point justifies the necessity and benefits of the partnership. |
| **15** | **5.1. Market analysis** | A market study is needed (possibly in parallel with 4.4). |
| **16** | **5.2. Competitors** | From the same sources as 5.1, in addition to 3.1.1 the innovation analysis is used. |
| **17** | **5.3. Kainodara** | The AI agent suggests possible pricing to the client, but the client has to confirm or enter his/her own. Based on competitor information (5.2) and product specifics (3.1.1). |
| **18** | **5.4. Commercialisation potential** | Summarises 4.5 (TPL at the beginning of the project, TPL at the end of the project). Evaluates the 4.5 activities to be carried out. \*The level of technological readiness of the product shall be indicated in accordance with the Description of the Recommended Classification of the Stages of Research and Experimental Development, approved by the Resolution of the Government of the Republic of Lithuania No 650 of 6 June 2012 <https://e-seimas.lrs.lt/portal/legalAct/lt/TAD/TAIS.426659/asr> |
| **19** | **2. Description of the legal entity**(2.1-2.3) | Actual data used for SME verification (can be filled in earlier). |
| **20** | **6. Resources (1A)** | It shall be described in terms of the need for equipment, premises, materials, etc. identified in Activity 4.5 and the resources available to the enterprise. In most cases, this item will be empty because of the administrative burden of including existing equipment or renting premises and because of the depreciation of equipment, which is usually depreciated or has a very low carrying amount. |
| **21** | **7. Financial Plan** (Excel "Financial Plan") | The AI agent evaluates the inventory to determine whether the achievement of revenue is treated as a commitment and whether priority points are given for a higher revenue/project value ratio. If points are given, the most optimistic option is taken. If there is a commitment to achieve the revenue/project value ratio, the client must confirm. |
| **22** | **1. Summary** | The last one is written when all the information has been gathered. |
| **23** | **8. Sources of literature** | Generated automatically from the content of 4.4. |
| **24** | **9. Annexes** | Includes automatically generated documents (CVs, tables, graphs). |

I haven’t forwarded it yet, but I can answer:

All the forms are usually filled out by the agency when they receive the documents from the client (input file).

Artūras wants an agent (or multiple agents) that can fill out the forms, notify if something is missing, and additionally – evaluate whether the idea is good or bad and indicate which documents are still needed.

Also, the agency doesn’t always receive all the information through official documents – sometimes it comes via email or SMS.

Regarding the sequence, I think Aurimas prepared a workflow document. Let me check.