NeoX

Go-to-Market Strategy & Market Analysis Italy

Strategic Roadmap for Market Launch & Scaling

Prepared for: NeoX Energy / Dyname S.r.l. Management
Prepared by: IMR Media (Strategic Consulting)
Date: February 6, 2026

NeoX Energy

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Confidential

About IMR Media:

IMR Media is a strategic consulting firm focused on digital business models and go-to-market strategies for tech companies. We combine technological expertise with deep market understanding and support NeoX as a strategic partner in its market launch.

Executive Summary

NeoX Energy is the digital SaaS platform by **Dyname S.r.l.** (San Vendemiano, Treviso), built on over 20 years of energy consulting experience. The platform transforms traditional energy consulting into a scalable digital product for the Italian SME market.

Strategic Context & Competitive Advantages

Our analysis identifies **three structural competitive advantages** that differentiate NeoX from pure tech startups and established energy providers:

1. Dyname's Sales Network = Unfair Advantage

With 20+ years of market presence, Dyname has **direct access to hundreds of Italian SMEs** with established trust relationships. While competitors like Enerbrain or Enel X must cold-acquire, NeoX has a **warm pipeline from day 1**.

Implication: The first 100-200 customers come from Dyname's existing customer base – with conversion rates of 15-25% (vs. 2-5% in cold outreach). **Customer Acquisition Cost (CAC) for this cohort: <€100** (vs. €500-1,200 in the market).

2. Technological Differentiation: Automated Invoice Data Extraction

NeoX utilizes a proprietary **Invoice Data Extraction API** that automatically reads and structures energy bills – independent of format or energy provider. While competitors rely on manual data entry or hardware installation, NeoX enables:

- **Onboarding in <5 minutes** (Upload → Analysis → Insights)
- **No technical integration** required (vs. Enerbrain's IoT installation)
- **Historical analysis** from existing invoices (12+ months immediately available)

Implication: The API dramatically lowers the entry barrier and enables **freemium scaling** without manual onboarding costs. The technology is unique in the Italian market and could in the future also be **marketed as a standalone product for other energy management platforms** (white-label opportunity).

3. Hybrid Positioning: SaaS + Consulting

Unlike pure software solutions, NeoX offers **technology-enabled consulting** – the combination of Dyname's energy expertise and digital platform. This addresses the **critical adoption barrier** of Italian SMEs: skepticism toward "software-only" without human support.

Dyname's consultant network (including Julian Faupel as strategic advisor) brings **direct customer access and trust transfer** – an asset that pure tech startups must build over years.

Market Opportunity & Pain Points

Metric	Value	Source	Significance for NeoX
SMEs Italy (>9 employees)	~221,000	ISTAT, Economyup	**Core target group**
With energy audit	33% (~73,000)	Censis/Edison	67% = **Greenfield**
IT energy price premium vs. EU	+30%	Eurostat, Confindustria	**Existential pain point**
Electricity price Italy	116 €/MWh	GME, Statista	vs. 87 €/MWh (DE), 61 €/MWh (FR)
Regulatory pressure	CSRD 2025-2028	EU Directive	**Compliance demand** growing
Digitalization SMEs	70% basic digital	EC Digital Decade	**SaaS-ready majority**

Concrete example: An Italian SME with €200,000 annual electricity costs pays **€44,000 more** than a French counterpart. Even 10% savings through NeoX = €20,000 p.a. → **ROI in <2 months** at €199/month subscription price.

The window for first-mover advantage is closing:

- Enerbrain (Series B, €10M+) expanding aggressively
- International players (Engie, Wattics) could attack Italy
- Enel X could start price war (SaaS free with electricity contracts)

Recommendation: Rapid scaling in 2026 critical to secure defensible market share.

1. Market Analysis: Italy – Energy SaaS for SMEs

1.1 Market Size & Segmentation

SME Universe Italy

Segment	Number	Characteristics	NeoX Relevance
Micro-enterprises (<10 emp)	~4.2M	95% of all companies	⚠ Too small, low LTV
Small (10-49 emp)	~180,000	First digitalization steps	✓ **Sweet spot**
Medium (50-249 emp)	~40,000	Professionalized structures	✓✓ **Premium segment**
Large (250+ emp)	~4,000	Enterprise solutions	⚠ Complex, long sales cycle

Total Addressable Market (TAM): 220,000 SMEs (small + medium)
Serviceable Addressable Market (SAM): ~150,000 (energy-intensive industries)
Serviceable Obtainable Market (SOM, Year 1): 400 customers (0.18% market share)

Prioritization by Energy Intensity

Industry	SME Count	Avg Energy Costs/Year	Pain Level	Prioritization
Manufacturing/Industry	~77,000	€150,000 - €500,000	🔥🔥🔥	**1st Priority**
Retail/GDO	~40,000	€80,000 - €200,000	🔥🔥🔥	**1st Priority**
Hospitality/Gastronomy	~26,000	€50,000 - €150,000	🔥🔥	**2nd Priority**
Office/Services	~55,000	€20,000 - €60,000	🔥	3rd Priority
Logistics	~22,000	€100,000 - €300,000	🔥🔥	**2nd Priority**

Strategic implication: Focus on Manufacturing + Retail in Phase 1 (highest pain + greatest savings potential = best ROI story).

1.2 Regulatory Drivers = Demand Catalysts

Corporate Sustainability Reporting Directive (CSRD)

Timeline & Impact:

Phase	Period	Affected Companies	Impact on NeoX
Wave 1	From 2025	>500 employees	Suppliers of these companies need ESG data
Wave 2	From 2026	>250 employees	**~5,000 Italian SMEs** directly affected
Wave 3	From 2028	Listed SMEs	Additional ~2,000 companies

CSRD Requirements for SMEs:

- **Scope 1+2 Emissions** (direct + indirect from electricity/heat) → NeoX feature "Carbon Footprint"
- **Energy consumption & efficiency** → NeoX core function
- **External auditability** → Audit trail necessary in NeoX

Opportunity: Position NeoX as "CSRD Compliance Tool" → addresses acute demand in 2026-2028.

Recommendation: Develop automated CSRD report generation as Enterprise feature (premium pricing possible).

Energy Efficiency Directive (EED) – Italian Implementation

Status quo:

- **Large companies:** Energy audit every 4 years mandatory (since 2015)
- **SMEs:** Not yet mandatory, but EU Commission discussing extension
- **Alternative:** ISO 50001 certification = audit exemption

Forecast: By 2027, energy-intensive SMEs (>10 GWh/year) will likely be audit-obligated.

Implication for NeoX:

- Audit preparation as use case (historical consumption data structured)
- Integration with audit software/service providers
- Positioning: "Audit-ready in 48h instead of 4 weeks manual data preparation"

Transizione 5.0 (2024-2026) – Subsidies for Energy Efficiency Software

Program details:

- **Target group:** SMEs investing in energy efficiency + digitalization
- **Subsidy:** Up to 45% tax credit on qualified investments
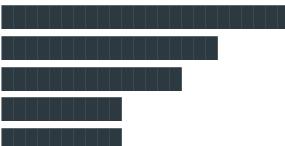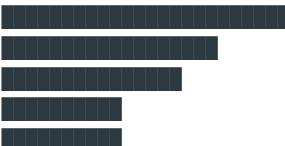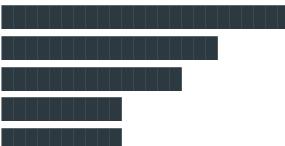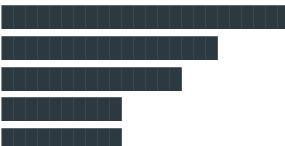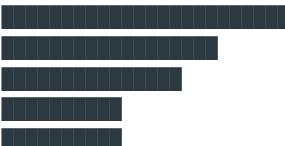- **Qualification:** Software must demonstrably enable energy savings

NeoX opportunity:

- Get certified as eligible solution
- Sales argument: "€2,388/year subscription costs → only €1,310 after subsidy"
- Marketing: Step-by-step guide "How to use Transizione 5.0 for NeoX"

Critical: Start process for certification as eligible solution (Q1 2026).

1.3 Energy Prices: The Existential Pain Point

International Comparison (2024/2025 Average)

```
Italy:     ████████████████████  116 €/MWh (+29% vs. EU)
EU avg:    ███████████████       90 €/MWh
Germany:   ██████████████        87 €/MWh (-25% vs. IT)
France:    ██████████            61 €/MWh (-47% vs. IT)
Spain:     ██████████            65 €/MWh (-44% vs. IT)
```

Why does Italy pay more?

1. **Import dependency:** 85% of energy imported (vs. 40% Germany)
2. **Gas dominance:** 55% electricity generation from gas (more expensive than coal/nuclear)
3. **Grid costs:** High infrastructure costs, especially South-North connection
4. **Low renewables:** Only 35% renewable (vs. 50% Spain)

Concrete pain for SMEs:

SME Size	Avg Electricity Costs/Year (IT)	Extra Costs vs. France	NeoX Savings Potential (10%)
Small (10-49 emp)	€50,000	€18,500	**€5,000/year**
Medium (50-249 emp)	€200,000	€74,000	**€20,000/year**
Large (250+ emp)	€800,000	€296,000	**€80,000/year**

Messaging implication: ROI communication must show **concrete euro amounts**, not just percentages. "€20,000 annual savings" beats "10% reduction".

1.4 Competitive Landscape

Direct Competitors (Italy)

Enerbrain (Turin) – Primary Competitor
Profile:

- **Founded:** 2015
- **Funding:** Series B, ~€10-15M
- **Focus:** HVAC optimization (heating, ventilation, climate) via IoT

- **Business model:** Hardware installation + SaaS monitoring
- **Customers:** Michelin, Carrefour, Banco BPM, Comune di Torino, Benetton

Value proposition:

- 12-30% HVAC cost reduction
- ROI in 6-24 months
- Plug-and-play IoT (eSense sensors, eNode actuators)

Strengths:

- ✅ Measurable savings through hardware control
- ✅ Big-name references (Enterprise focus)
- ✅ Venture-backed (scaling capital available)

Weaknesses:

- ✖ **High upfront costs** (hardware installation: €5,000-€15,000)
- ✖ HVAC only, no holistic energy consulting
- ✖ No bill-upload feature (manual data entry)
- ✖ Limited to buildings with HVAC systems (not for manufacturing with machine loads)

NeoX differentiation:

- **Software-only → €0 installation** (vs. Enerbrain €10k+)
- **Holistic:** All energy forms (electricity, gas, heat), not just HVAC
- **Faster start:** 5 min onboarding vs. weeks installation
- **SME-focused:** Enerbrain targets Enterprise (>500 emp)

Enel X Energy Management System – National Champion

Profile:

- Part of Enel (largest Italian energy provider)
- Platform for energy monitoring + demand response
- Target group: Commercial + Industrial (primarily Enel existing customers)

Strengths:

- ✅ **Brand trust:** Enel = market leader, known brand
- ✅ Cross-selling: Electricity contract + SaaS bundled
- ✅ Large sales organization

Weaknesses:

- ✖ **Conflict of interest:** Enel earns from electricity sales → skepticism about optimization advice
- ✖ Generic enterprise platform (not SME-specific)
- ✖ Slow innovation (corporate structure, no startup agility)

NeoX differentiation:

- **Independence = trust:** "We don't sell electricity, only transparency"
- **SME UX:** Simple dashboards vs. enterprise complexity
- **Personal consulting:** Dyname advisors vs. Enel call center

Edison Energia (CoCo App) – Consumer-focused

Profile:

- Second-largest energy provider Italy
- "CoCo" = digital app for consumption monitoring
- Target group: Private customers + small businesses (<10 emp)

Weaknesses:

- ✖ Primarily B2C, not professional SME tool
- ✖ No ESG reporting, no audit integration
- ✖ Limited features (only monitoring, no optimization recommendations)

NeoX differentiation: No direct competition (different target group).

International Players (Threat for 2027+)

Company	Origin	Status	Threat Level
Schneider Electric (EcoStruxure)	FR	Global, Enterprise focus	◉ Medium
Siemens (Energy Manager)	DE	B2B, but complex	◉ Medium
Engie	FR	Southern Europe expansion	◉ **High** (similar profile)
Wattics	IE	SaaS pure-play, agile	◉ **High** (similar positioning)

Risk mitigation: Rapid scaling in Italy 2026 = build defensible market share before international players localize.

SWOT Analysis: NeoX

Strengths

Strength	Impact	Reasoning
Dyname customer base	◉◉◉	**Most critical asset:** Warm pipeline, day-1 revenue possible
Invoice Extraction API	◉◉◉	**Technological barrier:** Unique in Italy, 5-min onboarding
Hybrid model (SaaS + Consulting)	◉◉	Addresses Italian preference for "human support"
Independence	◉◉	No conflict of interest (vs. Enel/Edison) → higher credibility
Fast market entry	◉	No hardware dependency (vs. Enerbrain) = faster scaling

Weaknesses

Weakness	Impact	Mitigation
Brand awareness	◉◉	NeoX new, Dyname only regional → **Inbound marketing + PR** needed
No freemium (current)	◉◉	High entry barrier → **Freemium launch Priority 1**
Sales capacity	◉	Currently dependent on Dyname advisors → **Dedicated sales hire** in Q2
Feature parity	◉	Real-time monitoring less mature than Enerbrain → **Roadmap focus**

Opportunities

Opportunity	Impact	Time Window	Action
CSRD wave	◉◉◉	2025-2028	**Prioritize ESG features**, CSRD-ready by Q2
Transizione 5.0	◉◉	Until end 2026	**Certification as eligible solution**
Energy prices remain high	◉◉	Structural	**Sharpen ROI messaging** (concrete € savings)
Partner network	◉◉	Ongoing	**Activate tax advisor channel** (CSRD compliance)
API white-label	◉	2027+	**Sell Invoice API to other platforms** (new revenue stream)

Threats

Risk	Impact	Probability	Mitigation
Enerbrain software-only tier	◉◉	Medium	**Quickly gain market share**, exploit Dyname network

Enel X price dumping		Medium	**Independence argument**, niche segments (non-Enel customers)
International expansion		Medium	**Local compliance expertise** as barrier, rapid scaling
CSRD delay		High (already "stop-the-clock")	**Primary value prop = cost savings**, not compliance

2. Go-to-Market Strategy: Dyname Network as Core

2.1 Strategy Overview: Three-Phase Approach

Analysis shows: **Dyname's sales network is the decisive success factor** for rapid market penetration. Our recommendation radically prioritizes this asset:

```
Phase 1 (Q1 2026)        Phase 2 (Q2-Q3)          Phase 3 (Q4+)
DYNAME ACTIVATION        FREEMIUM SCALING         ENTERPRISE + EXPANSION
|                        |                        |
├─ 50-100 customers      ├─ 300 customers         ├─ 400+ customers
├─ Existing customer pool├─ Inbound marketing     ├─ Outbound sales
├─ CAC <€100             ├─ Freemium conversion   ├─ Enterprise features
└─ Collect testimonials  └─ Partner network       └─ International pilots
```

Rationale: Cold outreach in Italy is expensive (CAC €500-1,200) and slow. Dyname's customer base offers **immediate access to qualified leads with existing trust**.

2.2 Phase 1: Dyname Existing Customer Activation (Critical!)

Objectives (Q1 2026)

Metric	Target	Benchmark	Source
New customers	50-100	-	-
Conversion rate	15-25%	2-5% (Cold outreach)	SaaS industry standard
CAC	<€100	€500-1,200	FirstPageSage B2B SaaS Report
MRR	€10,000-€20,000	-	-
Time-to-first-customer	<2 weeks	3-6 months (Startups)	-

Strategic Approach

1. Customer Segmentation & Prioritization

Analyze Dyname customer base by:

- **Energy consumption** (higher = greater savings potential = better ROI story)
- **Industry** (Manufacturing, Retail first)
- **Relationship strength** (long-term customers = higher trust)
- **Company size** (50-250 emp = sweet spot for Professional tier)

Prioritization matrix:

```
High │ A: HOT LEADS         │ B: QUICK WINS
     │ - Energy-intensive   │ - Medium-sized
     │ - Long relationship  │ - High relationship strength
     │ → Personal call      │ → Email + follow-up
Rel- │──────────────────────┼──────────────────────
atio │ C: NURTURE           │ D: LATER
nship│ - Low consumption    │ - New/weak relationship
     │ - Good relationship  │ → Phase 2 marketing
Low  │ → Webinar invitation │
     └──────────────────────┴──────────────────────
        Low        Energy Consumption        High
```

Recommendation: Focus on Segment A+B in Q1 (top 100 customers).

2. Sales Playbook for Dyname Advisors

Critical success factor: Dyname advisors must be **trained and incentivized** to sell NeoX.

Challenges:

- ⚠ Advisors are used to selling consulting projects (€5,000-€50,000), not SaaS subscriptions (€2,388/year)

- ⚠ Fear: "Does NeoX replace my consulting?" (Answer: No, NeoX = tool for advisors)
- ⚠ Time commitment: Advisors don't want to do "software demos"

Solution approach: Hybrid positioning

Framing for advisors: "NeoX is your digital tool to serve customers **continuously** and generate **recurring revenue**."

Incentive structure:

- **One-time bonus:** €200 per acquired NeoX customer
- **Recurring:** 5% of MRR as long as customer remains active (lifetime)
- **Target bonus:** €5,000 extra for 20+ customers by end Q1

Sales script (30-sec pitch for advisors to existing customers):

> "Mr. [Name], you've known us for [X] years as your energy advisor. We've now developed a digital platform – **NeoX** – that gives you **24/7 transparency** over your energy costs.
>
> Instead of talking to us only once a year, you see **every day** where you're wasting money. And we can react **proactively** to anomalies before they become expensive.
>
> Would you like us to upload your latest bill and show you **in 5 minutes** what's possible?"

Demo process (during call):

1. **Upload invoice** (customer sends PDF via email/WhatsApp)
2. **API extracts data** (live, within 30-60 sec)
3. **Dashboard shows:** Consumption trend, cost comparison vs. previous year, anomalies
4. **Closing:** "This is your status quo. With NeoX you see this every day + get alerts. €199/month, first 3 months free for existing customers."

3. Existing Customer Incentive Program

Offer for Dyname customers:

- ✅ **3 months free** (value: €597)
- ✅ **20% permanent discount** (€159/month instead of €199)
- ✅ **Priority support** (direct line to Dyname advisor)
- ✅ **Free initial analysis** (12 months historical data, normally €500)

Why so generous?

- **Strategic rationale:** These customers are testimonial providers + reference cases for Phase 2
- **CAC calculation:** Even with 80% discount in first year, CAC remains <€200 (vs. €500+ for cold leads)
- **LTV focus:** 3 years retention à €1,908/year (after discount) = €5,724 LTV → ROI 28x

4. Timeline & Execution

Week 1-2: Preparation

- ☐ Identify + segment top 100 Dyname customers
- ☐ Finalize sales playbook (incl. script, demo guide)
- ☐ Advisor training (2h workshop: product demo + sales techniques)
- ☐ Communicate incentive program (kickoff meeting)

Week 3-8: Outreach wave

- ☐ Segment A (25 hot leads): Personal call from known advisor
- ☐ Segment B (75 quick wins): Email from advisor + follow-up call
- ☐ Demo bookings: Target 50 demos in 6 weeks
- ☐ Conversion tracking: CRM integration (HubSpot/Pipedrive recommended)

Week 9-12: Feedback & iteration

- ☐ First 20-30 customers onboarded
- ☐ Collect product feedback (what's missing? what's annoying?)
- ☐ Collect testimonials (video interviews for Phase 2)
- ☐ Churn analysis (who cancels after trial? why?)

Expected conversion funnel:

```
100 Contacted Dyname customers
↓ 50% book demo = 50 demos
↓ 30% start trial = 15-25 trials
↓ 60% convert to paid = 10-15 paying customers per 100 contacted

→ With 200 contacted customers: 20-30 paying customers
→ With 500 (entire Dyname base): 50-75 customers possible
```

Success Metrics & KPIs (weekly)

Metric	Week 4	Week 8	Week 12
Contacted customers	50	150	200
Demo bookings	15	50	70
Trial starts	8	25	35
Paying customers	3	15	25
MRR	€600	€3,000	€5,000

Red flags (pivot triggers):

- Demo booking rate <30% → **Revise script/offer**
- Trial-to-paid <40% → **Product onboarding problem** (too complex? missing features?)
- Churn >5% in first 3 months → **Value delivery problem**

2.3 Phase 2: Freemium Scaling + Inbound (Q2-Q3)

Goal: Become more independent from Dyname network through **self-service acquisition**.

Freemium Strategy (CRITICAL for Scaling)

Why Freemium?

Benchmarks from SaaS industry:

- Freemium increases sign-ups by **300-500%** (vs. paid-only)
- Conversion Free→Paid: 2-5% (low-touch), 15-25% (high-touch with consulting)
- **Product-led growth:** Users test themselves, no sales demo needed

NeoX-specific advantages:

- **Invoice Extraction API = perfect for freemium:** 1 invoice upload → immediate value (no manual work)
- **Viral effect:** SME decision-makers share "look what I found" in networks
- **Lead gen:** Email addresses for nurture campaigns

Freemium Tier Definition

```
┌─────────────────────────────────────────────┐
│ FREE                                         │
├─────────────────────────────────────────────┤
│ ✓ 1 location                                 │
│ ✓ Bill upload + automatic extraction         │
│ ✓ 12-month trend analysis (historical)       │
│ ✓ Basic dashboard (kWh, € costs, comparison) │
│ ✓ 1 report/month (PDF download)              │
│ ✗ No real-time monitoring                    │
│ ✗ No alerts                                  │
│ ✗ No carbon footprint                        │
│ ✗ Community support only (FAQ)               │
└─────────────────────────────────────────────┘


PROFESSIONAL (€199/month)
┌─────────────────────────────────────────────┐
│ ✓ Up to 5 locations                          │
```

```
| ✓ Real-time monitoring (15-min intervals)    |
| ✓ Anomaly alerts (SMS/email)                 |
| ✓ Carbon footprint (Scope 1+2)               |
| ✓ Unlimited reports                          |
| ✓ Quarterly consulting session (1h, Dyname)  |
| ✓ Export for audits                          |
| ✓ Email support (48h response)               |

ENTERPRISE (€499/month + custom)
├─────────────────────────────────────────────┐
| ✓ Unlimited locations                        |
| ✓ CSRD-compliant ESG reports                 |
| ✓ API integration (ERP, accounting)          |
| ✓ Dedicated account manager                  |
| ✓ Monthly strategy calls                     |
| ✓ White-label option                         |
| ✓ Priority support (4h response)             |
```

Upgrade triggers (automated prompts):

- After 3 bill uploads: "Upgrade for automatic uploads (API integration)"

- On anomaly detection: "You would have seen this anomaly 2 weeks earlier with Pro (real-time)"

- At report limit: "You've reached your report limit. Upgrade for unlimited reports"

Conversion Funnel (Free → Paid)

Strategy: High-touch for promising free users

```
10,000 Free sign-ups
↓ 30% upload at least 1 invoice = 3,000 active users
↓ 10% show "high intent" (3+ uploads, open reports regularly) = 300 leads
↓ Outbound email from sales: "We see you're using NeoX intensively. Book call?"
↓ 50% book call = 150 calls
↓ 30% convert = 45 new Pro customers/month

Plus: 2% self-service conversion (without call) = 60 additional
→ Total: ~100 new customers/month with 10k free users
```

Technical implementation (recommendation for tech partner):

- **User tiers in DB:** Free/Pro/Enterprise flag

- **Feature gating:** Middleware checks tier before feature access

- **Usage tracking:** Log events like "bill-upload", "report-download", "dashboard-view"

- **Automated emails:** Trigger on certain events (e.g., "3rd upload → upsell email")

Inbound Marketing: SEO + Content

Goal: 5,000 organic website visitors/month by end Q3

SEO Strategy

Keyword opportunities (Italy):

Keyword (IT)	Monthly Searches	Difficulty	Search Intent	Priority
"gestione energia PMI"	480	Medium	Commercial	🔥🔥🔥
"ridurre costi energia azienda"	320	Medium	Transactional	🔥🔥🔥
"CSRD obblighi Italia"	720	Low	Informational	🔥🔥
"software monitoraggio consumi"	290	Low	Commercial	🔥🔥🔥
"Transizione 5.0 energia"	890	Low	Informational	🔥🔥
"diagnosi energetica online"	210	Low	Transactional	🔥🔥
"carbon footprint calcolo"	410	Medium	Informational	🔥

Content plan (Q2-Q3):

Month 1-2: Foundation

- Pillar page: "Guida completa al gestione energetica per PMI italiane" (5,000+ words)
- 8 cluster articles (see below)
- ROI calculator embedded (interactive tool)
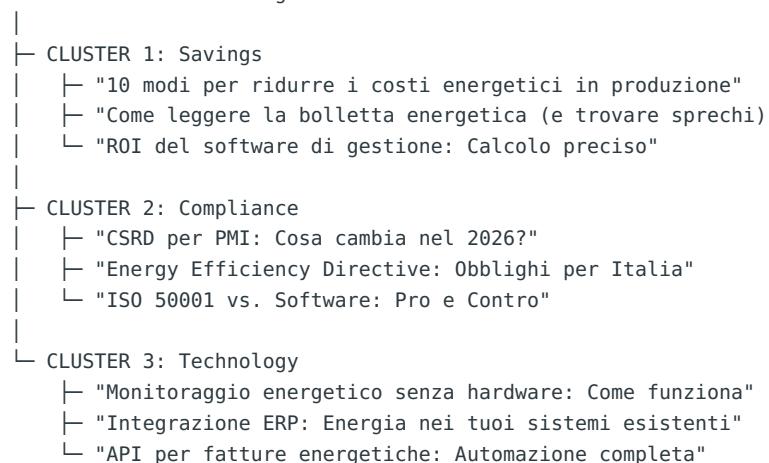
Month 3-4: CSRD focus

- "CSRD per PMI: Guida pratica (2026 Update)"
- "Come calcolare Scope 1 e 2 emissioni"
- "Software vs. Consulente: Cosa serve per CSRD?"
- Case study: "Come [Anonymous Company] ha preparato il CSRD report in 2 settimane"

Month 5-6: Transizione 5.0

- "Transizione 5.0: Guida ai incentivi per software energetica"
- "NeoX come investimento detraibile: Passo per passo"
- Webinar: "Finanziare la digitalizzazione energetica" (100+ participants target)

Content cluster structure:

```
PILLAR: "Gestione Energia PMI — La Guida"
│
├─ CLUSTER 1: Savings
│   ├─ "10 modi per ridurre i costi energetici in produzione"
│   ├─ "Come leggere la bolletta energetica (e trovare sprechi)"
│   └─ "ROI del software di gestione: Calcolo preciso"
│
├─ CLUSTER 2: Compliance
│   ├─ "CSRD per PMI: Cosa cambia nel 2026?"
│   ├─ "Energy Efficiency Directive: Obblighi per Italia"
│   └─ "ISO 50001 vs. Software: Pro e Contro"
│
└─ CLUSTER 3: Technology
    ├─ "Monitoraggio energetico senza hardware: Come funziona"
    ├─ "Integrazione ERP: Energia nei tuoi sistemi esistenti"
    └─ "API per fatture energetiche: Automazione completa"
```

SEO technical:

- **Interlinking:** Every cluster article links to pillar page
- **Structured data:** FAQ schema, HowTo schema for better snippets
- **Local SEO:** Google My Business for Dyname (reviews = trust signal)

LinkedIn Marketing

Goal: 1,000 company followers, 50 leads/month via LinkedIn

Personal branding (Dyname CEO + Julian Faupel):

Weekly content rhythm:

- **Monday:** Market insight ("Energy prices in Italy up X% – what SMEs can do")
- **Wednesday:** Customer success story (anonymized or with permission)
- **Friday:** Regulatory update or trend analysis

LinkedIn Ads (€2,000/month budget):

- **Audience:** CFOs, CEOs, SMEs 50-500 emp, Italy, Industries: Manufacturing, Retail
- **Ad format:** Sponsored content (case study) + lead-gen form
- **Offer:** "Free energy analysis – upload your bill"
- **Expectation:** 20-30 leads/month @ €70-100 CPL

Partner Network (Channel Strategy)

Goal: 20 active partners by end Q3, 10 customers/partner/year = 200 additional customers

Partner types & value proposition:

Partner Type	SME Contacts Count	Value Prop for Partner	Incentive
Energy consultants (freelance)	50-200	Recurring revenue, white-label reports	20% lifetime
Commercialisti (tax advisors)	100-500	CSRD compliance tool for clients	15% + co-branding
Industry associations (Confindustria, CNA)	10,000+	Member benefit	Framework agreement, 10% for members
IT system integrators	50-200	Add-on to digitalization projects	25% (higher sales effort)

Partner onboarding process:

1. **Outreach:** Email + LinkedIn (start from Julian's network)
2. **Pitch deck:** 10 slides (market opportunity, NeoX value prop, commission model, case studies)
3. **Kickoff call:** 1h demo + sales training
4. **Partner portal:** Google Sheet for referral tracking (MVP), later CRM integration
5. **Monthly partner calls:** Product updates, best-practice sharing

Partner marketing kit:

- Co-branded one-pager (PDF)
- Email templates for partner outreach
- Video testimonials (partners can show in pitches)

2.4 Phase 3: Enterprise Segment + Platform Scaling (Q4)

Goal: Win premium customers (€500+ MRR), solidify product-led growth

Enterprise Segmentation

Target group:

- Medium-sized companies (100-500 emp)
- Multi-site operations (retail chains, hotel groups)
- Manufacturing with complex energy flows

Enterprise needs (vs. SME):

- ✅ **Multi-site dashboard:** Central overview of all locations
- ✅ **API integration:** ERP, SCADA, accounting software
- ✅ **CSRD-compliant reports:** Automatically generated, audit-ready
- ✅ **Dedicated account manager:** Regular strategy calls
- ✅ **White-label:** For corporate groups (own branding)

Enterprise pricing:

- **Base:** €499/month (unlimited locations)
- **Add-ons:**
  - API integration: +€200/month
  - CSRD reports: +€150/month
  - Dedicated AM: +€300/month
- **Typical enterprise deal:** €800-1,200/month

Sales motion:

- **Outbound:** Account-based marketing (ABM) to top 100 energy consumers
- **Sales cycle:** 3-6 months (vs. 2-4 weeks for SME)
- **Team:** 2 BDRs (Business Development Reps) from Q3, 1 Account Executive from Q4

Platform Extensions (Product Roadmap)

Q3-Q4 development priorities:

Feature	Business Impact	Technical Complexity	Priority
Mobile app (iOS/Android)	Facility managers can check alerts on the go	Medium	🐾🐾
CSRD auto-reports	Enterprise deal-breaker, premium pricing	High	🐾🐾🐾
ERP integration (SAP, Zucchetti)	Enterprise requirement	High	🐾🐾
Predictive analytics (AI-powered)	Differentiator vs. Enerbrain	High	🐾
Multi-energy view (electricity + gas + heat)	Holistic view	Medium	🐾🐾

Recommendation: CSRD auto-reports = highest priority (addresses acute 2026 demand + justifies premium pricing).

Technical implementation (partner opportunity):

- **Expand Invoice API:** Currently electricity, expand to gas/heat
- **CSRD template engine:** Automatic generation according to ESRS standards
- **API gateway:** For ERP integrations (middleware architecture)

3. Pricing Strategy & Unit Economics

3.1 Recommended Pricing Model

Rationale: Tiered + Freemium

Benchmark analysis:

Competitor	Model	Pricing	Pro/Con
Enerbrain	Hardware + SaaS	€10k+ installation + €X/month	High barrier, but lock-in
EnergyCAP (US)	Per meter/year	$X/meter (variable)	Hard to calculate for SMEs
Enel X	Bundled	Part of electricity contract	"Free" (but conflict of interest)

NeoX differentiation: Transparent tiered model without hardware costs

Recommended price structure

```
FREE
- €0/month
- 1 location, basic analytics
- Goal: Lead gen, viral growth

PROFESSIONAL (Core product)
- €199/month (€2,388/year with annual subscription, 15% discount)
- Up to 5 locations, real-time, alerts, carbon footprint
- Quarterly consulting (1h Dyname expert)
- Goal: Main revenue driver (80% of customers)

ENTERPRISE
- €499/month + custom add-ons
- Unlimited locations, CSRD reports, API, dedicated AM
- Goal: 10-15% of customers, but 30-40% of revenue
```

Add-on pricing (Enterprise):

- API integration: +€200/month
- CSRD-compliant reports: +€150/month
- Additional consulting hours: €150/h

3.2 Unit Economics

Customer Lifetime Value (LTV)

Assumptions:

- **Average MRR:** €220 (mix of Pro + Enterprise)
- **Churn rate:** 4% monthly (after stabilization)
- **Average retention:** 25 months

LTV calculation:

```
LTV = MRR × Average retention
LTV = €220 × 25 = €5,500
```

LTV by channel:

- **Dyname existing customers:** €6,000 (lower churn, 30 months retention)
- **Freemium conversion:** €4,500 (higher churn, 20 months)
- **Partner referrals:** €5,800 (similar to Dyname)
- **Cold inbound:** €4,200 (highest churn, 19 months)

Customer Acquisition Cost (CAC)

Channel	CAC	LTV	LTV:CAC Ratio	Payback Period
Dyname existing customers	€80	€6,000	**75:1**	<1 month
Freemium → Pro	€120	€4,500	**37.5:1**	~1 month
Partner referrals	€150	€5,800	**38.7:1**	~1 month
SEO/inbound	€250	€4,500	**18:1**	2 months
LinkedIn ads	€400	€4,200	**10.5:1**	3 months
Cold outbound (hypothetical)	€800	€4,200	**5.2:1**	6 months

Insights:

- ☑ **Dyname channel is exceptionally profitable** (75:1 is exceptional, SaaS standard = 3:1)
- ☑ All channels are profitable (LTV:CAC >3:1)
- ⚠ Avoid cold outbound (low efficiency)

Strategic implication: Maximum exploitation of Dyname channel is critical for financial efficiency.

3.3 Revenue Projection (Year 1)

Conservative Case

```
Q1: 50 customers × €220 MRR = €11,000 MRR (€132k ARR run-rate)
Q2: +100 = 150 total × €220 = €33,000 MRR
Q3: +150 = 300 total × €220 = €66,000 MRR
Q4: +100 = 400 total × €220 = €88,000 MRR (€1,056M ARR)
```
Year-1 revenue: ~€600,000 (weighted average, as customers start at different times)

Optimistic Case (with aggressive execution)

```
Q1: 100 customers × €220 = €22,000 MRR
Q2: +150 = 250 × €220 = €55,000 MRR
Q3: +200 = 450 × €220 = €99,000 MRR
Q4: +150 = 600 × €220 = €132,000 MRR (€1,584M ARR)
```
Year-1 revenue: ~€900,000

Critical assumptions:

- Dyname customer base = 500 companies, 20% conversion = 100 customers
- Freemium generates 10,000 sign-ups by year-end, 2% convert = 200 customers
- Partner channel brings 100 customers (10 partners × 10 customers/partner)

4. Technology Stack & API Strategy

4.1 Invoice Data Extraction API = Differentiator

Technology Overview

The **Invoice Data Extraction API** is the technological core of NeoX and provides a **structural competitive advantage** over all Italian competitors.

Current state:

- **Format-agnostic:** Works with PDFs from all Italian energy providers (Enel, Edison, A2A, Eni, etc.)
- **Data extraction:** Consumption (kWh), costs (€), periods, tariffs, grid fees, taxes
- **Speed:** 30-60 seconds per invoice
- **Accuracy:** >95% (estimated, should be validated)

Competitive comparison:

Provider	Onboarding Method	Time-to-Insight	Hardware
NeoX	Bill upload (PDF)	**5 minutes**	✘ No
Enerbrain	IoT installation	2-4 weeks	✓ Yes (€5k+)
Enel X	Manual data entry	1-2 hours	⚠ Optional
Edison	App-based, manual	30-60 min	✘ No

Value proposition for customers:

- "From invoice to insights in 5 minutes – no technician, no installation, no integration"
- "12 months historical analysis immediately available" (vs. Enerbrain: only from installation)

API as Standalone Product (White-Label Opportunity)

Strategic consideration: The API could **also be sold to other platforms** facing similar challenges (invoice processing).

Potential customers for white-label API:

1. **Other energy management platforms** (outside Italy or in niche segments)
2. **Energy brokers/comparison portals** (need structured data for tariff comparisons)
3. **Tax consulting software** (automatic extraction for operating cost billing)
4. **Facility management software** (building operating cost tracking)

Revenue model (hypothetical):

- **Pay-per-API-call:** €0.20-€0.50 per extracted invoice
- **SaaS license:** €500-€2,000/month for unlimited calls
- **Custom integration:** €5,000-€20,000 one-time + license

Potential: With 10 white-label customers à €1,000/month = €10,000 MRR additional (without NeoX customers).

Recommendation:

- **Short-term (2026):** Focus on NeoX (no API sales to competitors)
- **Medium-term (2027):** After market leadership in Italy → white-label to **non-competing** segments (e.g., DACH energy brokers)
- **Long-term:** API as standalone business unit (like Stripe/Twilio)

4.2 Platform Architecture (Recommendations for Tech Partner)

Scalability = Critical

Expected growth:

- **Q1:** 50 paying + 200 freemium = 250 users

- **Q4:** 400 paying + 3,000 freemium = 3,400 users
- **Year 2:** 1,500 paying + 15,000 freemium = 16,500 users

API call volume:

- Average 3 invoices/customer/month (electricity, gas, possibly heat)
- 3,400 users × 3 = ~10,000 API calls/month (Q4)
- Year 2: ~50,000 calls/month

Infrastructure recommendation:

- **Cloud-native:** AWS/GCP (serverless for API = auto-scaling)
- **Database:** PostgreSQL (relational for structured energy data) + Redis (caching)
- **File storage:** S3-compatible for PDF invoices (compliance: keep 10 years)
- **Monitoring:** Datadog/New Relic (performance tracking critical for UX)

Integrations Roadmap

Phase 1 (Q1-Q2): Core functionality

- ☑ Invoice Extraction API (running)
- ☑ Dashboard (real-time + historical)
- ☑ Alerts (email/SMS)

Phase 2 (Q3): Premium features

- ☐ **ERP integration:** Zucchetti, SAP (via REST API)
- ☐ **Accounting integration:** DATEV, Xero (automatic export)
- ☐ **Mobile app:** React Native (iOS + Android)

Phase 3 (Q4): Enterprise + compliance

- ☐ **CSRD report generator:** Template engine according to ESRS standards
- ☐ **API gateway:** For enterprise customers (own data analyses)
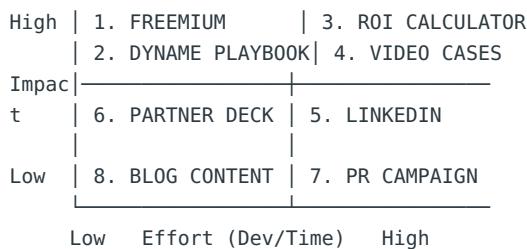- ☐ **Audit trail:** Compliance logging (who changed what when)

5. Operational Roadmap & Quick Wins

5.1 Next 30 Days (CRITICAL Phase)

Week	Focus	Deliverables	Owner	Status Check
1	Foundation	• Freemium tier specification • Dyname customer list segmented • Sales playbook draft	NeoX Mgmt + Tech Partner	Friday review
2	Launch prep	• Freemium technically live • Advisor training (2h workshop) • ROI calculator website integration	Tech Partner + Marketing	Monday review
3	Outreach start	• 50 Dyname customers contacted • 15 demos booked • LinkedIn content plan started	Sales (Dyname advisors)	Wednesday review
4	Momentum	• First 5 paying customers • 3 video testimonial interviews • Partner deck finalized	Sales + Marketing	Friday review

Critical path: Week 1-2 are **blockers for everything else**. Without freemium + sales playbook, Phase 1 cannot start.

5.2 Quick Wins (Impact vs. Effort)

```
High | 1. FREEMIUM     | 3. ROI CALCULATOR
     | 2. DYNAME PLAYBOOK| 4. VIDEO CASES
Impac|—————————————————|—————————————————
t    | 6. PARTNER DECK | 5. LINKEDIN
     |                 |
Low  | 8. BLOG CONTENT | 7. PR CAMPAIGN
     └—————————————————┴—————————————————

     Low   Effort (Dev/Time)   High
```
Prioritization:

1. **Freemium** (2 weeks dev) → Unlocks scaling
2. **Dyname playbook** (3 days) → Activates first revenue stream
3. **ROI calculator** (1 week) → Website conversion +30%
4. **Video cases** (2 weeks) → Social proof for Phase 2
5. **LinkedIn plan** (1 day) → Ongoing lead gen
6. **Partner deck** (1 week) → Channel diversification
7. **PR campaign** (3 weeks) → Brand awareness (later OK)
8. **Blog content** (ongoing) → SEO long game

5.3 90-Day Milestones

Milestone	Target	Measurement	Responsible
M1: First 10 customers	Proof-of-concept, testimonials	10 paying customers	Sales (Dyname)
M2: Freemium live	Scaling foundation	500 free sign-ups	Tech + Marketing
M3: Partner network	Channel diversification	5 active partners	Partnerships (Julian)
M4: Content presence	SEO foundation	10 articles live, 1,000 organic visitors	Marketing
M5: €10k MRR	Revenue milestone	50 customers à €200 MRR	Entire team

Red flag triggers (pivot necessity):

- By day 30: No 5 customers from Dyname → **Revise sales playbook** or **question pricing**
- By day 60: Freemium <200 sign-ups → **Increase marketing budget** or **adjust value prop**
- By day 90: Churn >10% → **Product problem** (onboarding too complex? missing features?)

6. Risks & Mitigation

6.1 Market Risks

Risk	Probability	Impact	Early Warning Signals	Mitigation
CSRD delay (EU "stop-the-clock" extended)	High	Medium	EU Parliament resolutions	**Primary value prop = cost savings**, not compliance. Adjust messaging.
Energy prices drop	Medium	High	Wholesale prices <90 €/MWh	Even with lower prices: **transparency + optimization** remain valuable. ESG trend independent.
Recession in Italy	Medium	High	GDP growth <0%	**Freemium** maintains engagement. In crises, **cost reduction becomes more important**, not less.

6.2 Competitive Risks

Risk	Probability	Impact	Early Warning Signals	Mitigation
Enerbrain launches software-only	Medium	High	Product announcements, pricing changes	**Rapid scaling 2026** = defensible market share. **Dyname network** as barrier (Enerbrain doesn't have this).
Enel X makes SaaS free	Low-Medium	High	Press releases, customer feedback	**Strengthen independence argument**: "Trust electricity seller with optimization?" **Prioritize niche segments** (non-Enel customers).
International expansion (Engie, Wattics)	Medium	Medium	LinkedIn job postings (Italy), local partnerships	**Local compliance expertise** as barrier (Italian CSRD implementation). **Quickly secure first-mover advantage**.

6.3 Operational Risks

Risk	Probability	Impact	Early Warning Signals	Mitigation
API scaling problems	Medium	High	Latency >5 sec, error rate >5%	**Load tests from day 1**. Cloud infrastructure (auto-scaling). **Monitoring dashboard** (Datadog).
Dyname advisor resistance	Medium	High	Low demo booking rates, negative feedback	**Incentivization** (bonus + recurring). **Framing:** NeoX = tool **for** advisors, not **instead of** advisors.
High freemium churn	High	Low	>90% inactive after 30 days	**Acceptable** – freemium is lead-gen tool. Focus on **high-intent users** (3+ uploads) for paid conversion.
Feature parity with Enerbrain	Low	Medium	Customer churn to Enerbrain, feature requests for HVAC control	**Differentiation:** NeoX = software-only, holistic. **Enerbrain = hardware HVAC focus**. Don't compete directly, address different use cases.

7. Success Measurement & KPIs

7.1 North Star Metric

Annual Recurring Revenue (ARR) – Target: **€1M by end 2026**

Rationale: ARR reflects sustainable growth (not just one-time revenue) and is the primary metric for SaaS valuations.

7.2 Dashboard Metrics (Monthly)

Acquisition (New Customers)

Metric	Q1 Target	Q2 Target	Q3 Target	Q4 Target	Tracking
New paying customers	50	100	150	100	CRM
Freemium sign-ups	200	1,500	3,000	5,000	Product analytics
Website traffic (organic)	500	2,000	5,000	10,000	Google Analytics
Demo bookings	30	80	120	100	CRM

Activation (Onboarding)

Metric	Target	Benchmark	Tracking
Freemium → 1st bill upload	>40%	30-50% (SaaS)	Product analytics
Demo → trial start	>50%	40-60%	CRM
Trial → paid conversion	>60%	25-40% (high-touch)	CRM

Revenue

Metric	Q1	Q2	Q3	Q4
MRR	€10k	€30k	€66k	€88k
ARR (run-rate)	€120k	€360k	€792k	€1,056M
Average MRR/customer	€200	€210	€220	€220

Retention

Metric	Target	Industry Benchmark	Tracking
Monthly churn	<5%	3-7% (B2B SaaS)	Cohort analysis
Net revenue retention	>95%	90-110%	Finance dashboard
NPS (Net Promoter Score)	>50	30-50 (B2B)	Quarterly survey

Efficiency

Metric	Target	Benchmark	Tracking
CAC (blended)	<€300	€500-800 (IT B2B)	Marketing + sales costs / new customers
LTV:CAC ratio	>5:1	3:1 (healthy)	LTV calculation / CAC
CAC payback period	<4 months	6-12 months	Months until customer paid back CAC

7.3 Leading Indicators (Weekly)

These metrics signal problems/successes BEFORE lag metrics:

- **Demo booking rate** (Contacted leads → demo): Should remain >30%
- **Trial activation** (Trial start → 1st bill upload): Should be >60%
- **LinkedIn engagement rate**: Likes+comments per post (target: >3%)
- **Freemium-→-demo rate**: High-intent users booking demo (target: >15%)
- **Churn early warning signals**: Users who haven't logged in 2+ weeks (re-engagement campaign)

8. Summary & Action Recommendations

8.1 Key Insights

✅ Structural advantages are exceptionally strong

1. **Dyname network** = 500+ warm leads with CAC <€100 (vs. €500-1,200 in market)
2. **Invoice Extraction API** = technological differentiation, unique in Italy
3. **Hybrid positioning** = addresses Italian preference for "human + machine"

This combination doesn't exist with any competitor.

⚡ Market timing is critical

- **2026 = window for first-mover:** CSRD wave starts, energy prices remain high
- **2027+ = competitive pressure increases:** International players could attack Italy
- **Recommendation:** Aggressive scaling in 2026 necessary to secure defensible market share

🎯 Execution risk is primarily internal

- **Biggest risk:** Dyname sales network not fully exploited (if advisors aren't activated)
- **Second biggest risk:** Too slow product development (freemium, CSRD features)
- **Market risks** (CSRD delay, competition) are **manageable** if execution is right

8.2 Strategic Action Recommendations

Priority 1: MAXIMALLY exploit Dyname network (Q1)

Action:

- 100% focus on activation of first 100-200 existing customers
- Advisor training + incentivization as critical success factor
- Target: 50-100 paying customers from Dyname pool by end Q1

Rationale: This channel has 75:1 LTV:CAC ratio – exceptionally profitable. **Every non-converted Dyname customer is lost opportunity** (other channels are 10x more expensive).

Owner: Sales lead (Dyname CEO?) + Julian Faupel (advisor coordination)

Priority 2: Freemium launch as scaling foundation (Week 1-2)

Action:

- Technical implementation: User tiers, feature gating, automated upsell prompts
- Marketing campaign: "Free energy analysis in 5 minutes"
- Conversion optimization: High-touch outreach to most active free users

Rationale: Without freemium, scaling remains limited to Dyname network + paid marketing. Freemium = **300-500% more leads** at lower CAC.

Owner: Tech partner (development) + Marketing (launch campaign)

Priority 3: Content marketing for inbound lead gen (Q2-Q3)

Action:

- SEO strategy: 16+ articles on compliance (CSRD, Transizione 5.0) + cost savings
- LinkedIn presence: Dyname CEO + Julian as thought leaders
- ROI calculator + interactive tools for website conversion

Rationale: Inbound marketing has **lower CAC long-term** (€250 vs. €400-800 for paid ads) and builds **brand authority**.

Owner: Marketing lead + content freelancer (if needed)

Priority 4: Partner network as channel diversification (Q2-Q3)

Action:

- 20 partner pilots (tax advisors, energy consultants, IT system integrators)

- Partner incentive: 15-25% recurring commission
- Partner enablement: Deck, email templates, monthly calls

Rationale: Partners have **their own customer relationships** and can sell NeoX as add-on. **Scales sales without headcount**.

Owner: Julian Faupel (uses existing consultant networks)

Priority 5: CSRD features for enterprise segment (Q3-Q4)

Action:

- Automated CSRD report generation (according to ESRS standards)
- Enterprise pricing: €500-1,200/month for premium features
- Outbound sales to top 100 energy consumers in Italy

Rationale: Enterprise customers bring **3-5x higher MRR** and have **lower churn**. CSRD compliance is acute need 2026-2028.

Owner: Product lead (feature roadmap) + sales lead (enterprise outbound)

8.3 Investment Recommendations

Team Building (12-Month Horizon)

Role	Timing	Rationale	Cost (estimated)
Dedicated sales manager	Q2	Relieve Dyname advisors, focus on closing	€50k-70k/year
Marketing manager	Q2	Content, SEO, paid ads, partner marketing	€45k-60k/year
Customer success manager (part-time)	Q3	Churn reduction, upselling	€25k-35k/year (part-time)
2x BDRs (Business Development Reps)	Q4	Enterprise outbound, demo bookings	€40k-50k/year each

Total Year-1 headcount investment: ~€200k-250k

Marketing Budget

Channel	Q1	Q2	Q3	Q4	Total
LinkedIn ads	€2k	€3k	€4k	€5k	€14k
Google ads	-	€2k	€3k	€4k	€9k
Content creation	€3k	€4k	€4k	€4k	€15k
Events/PR	€1k	€3k	€5k	€5k	€14k
Total	**€6k**	**€12k**	**€16k**	**€18k**	**€52k**

Tech Development (Partner Scope)

Recommended features (prioritized by business impact):

Feature	Business Value	Dev Effort	Timeline	Cost (estimated)
Freemium tier	🔥🔥🔥 Critical	2 weeks	Q1	€8k-12k
Mobile app	🔥🔥 High	8-12 weeks	Q3	€40k-60k
CSRD auto-reports	🔥🔥🔥 Critical (Enterprise)	6-8 weeks	Q3	€30k-50k
ERP integration	🔥🔥 High (Enterprise)	6-10 weeks	Q3-Q4	€35k-55k
API gateway (for white-label)	🔥 Medium (future)	4-6 weeks	Q4+	€20k-30k

Total Year-1 dev investment: ~€130k-200k (depending on prioritization)

8.4 Success Metrics (12-Month Goals)

Category	Conservative	Realistic	Optimistic
Paying customers	250	400	600
Freemium users	2,000	3,500	10,000
ARR	€600k	€1M	€1.5M
Monthly churn	<6%	<4%	<3%
CAC (blended)	<€400	<€300	<€200
NPS	>40	>50	>60

The €1M ARR goal is achievable with:

- ☑ Successful Dyname activation (100+ customers from existing base)
- ☑ Freemium launch + conversion optimization (200+ from freemium)
- ☑ Partner network building (100+ from partners)
- ☑ Low churn (<5%)

8.5 Next Steps (Immediate Actions)

Week 1 (Immediately):

1. ☐ **Kick-off meeting:** NeoX management + IMR Media + tech partner
   - Alignment on strategy (this document)
   - Clarify responsibilities (who owns what?)
   - Set Q1 milestones
2. ☐ **Dyname customer list:** Segmentation by energy consumption + industry + relationship strength
3. ☐ **Finalize freemium scope:** Tech specs, timeline, launch date

Week 2: 4. [ ] **Advisor training:** 2h workshop (product demo + sales script + incentive communication) 5. [ ] **Freemium development start:** Sprint planning with tech partner 6. [ ] **Content plan:** Q1-Q2 editorial calendar (SEO articles, LinkedIn posts)

Week 3-4: 7. [ ] **First outreach wave:** 50 Dyname customers contacted, 15 demos booked 8. [ ] **Website optimization:** ROI calculator embedded, freemium CTA prominent 9. [ ] **Partner deck:** Finalized + first 5 partner pilots approached

End of month 1: 10. [ ] **Checkpoint review:** First 5-10 customers won? Freemium live? Collect feedback and iterate.

9. Closing & Offer

The Opportunity

NeoX stands at a **unique point**:

- **Massive market opportunity:** 220,000 SMEs in Italy, 67% without energy management solution
- **Structural advantages:** Dyname network + Invoice API + hybrid model = unbeatable combination
- **Timing:** Regulatory tailwind (CSRD, Transizione 5.0) + high energy prices = pull demand

The window for first-mover advantage is open – but not for long.

Our Role as Partner

IMR Media brings:

1. **Strategic clarity:** This analysis is just the beginning – we can advise ongoing
2. **Technology expertise:** Close collaboration with tech partner for optimal implementation
3. **Consultant network:** Julian Faupel's connections to Dyname + Italian energy consultant networks
4. **Execution support:** Not just strategy documents, but **hands-on implementation** (content, sales playbooks, partner onboarding)

Possible Next Steps (optional)

If NeoX management desires further support:

1. **Strategy workshop** (1-2 days): Deep-dive into execution details with entire team
2. **Sales playbook development:** Hands-on training for Dyname advisors
3. **Tech roadmap prioritization:** Together with tech partner rank features by business impact
4. **Ongoing consulting:** Quarterly reviews (strategy updates, KPI analysis, pivot decisions)
5. **Content marketing execution:** We write/coordinate SEO articles, LinkedIn content
6. **Partner network building:** We use Julian's network for first 20 partner pilots

We're ready when you are.

Contact:
IMR Media
Julian Faupel (Partner, Dyname Advisor)
Erik (Partner, Tech Lead)
✉ [Contact via established channels]

Document End

This document was created based on publicly available market data (see sources in footnotes), competitor analyses and SaaS industry benchmarks. All projections are estimates and not guarantees. Success depends on correct execution.