Certify Intel Project - Team Role Assignments & Task Ownership

Team Structure

Team Member	Role	Primary Responsibility
You	Technical Lead	Build & maintain the platform
AK	Project Sponsor	Strategic direction, approvals
CM	Research Lead	Competitor discovery, market intel
KW	Data Analyst	KPI analysis, Excel modeling
MS	Delivery Lead	PowerPoint, dashboard design

AK — Project Sponsor

Owns: Strategy, Decisions, Stakeholder Management

Task	Ownership	Due
Define "middle market" criteria	Approve final definition	Week 1
Prioritize competitor list	Final decision	Week 1-2
Review & approve KPI definitions	Sign-off	Week 1
Weekly status check-ins	30 min/week	Weekly
Review AI insights for strategic relevance	Approve/reject	Week 3-5
Present final deliverables to executives	Owner	Week 5-6

CM — Research Lead

Owns: Competitor Discovery, Market Context, Data Sourcing

Task	Deliverable	Due
Build competitor master list (50+ companies)	Excel: Name, Domain, Segment	Week 1
Identify pricing page URLs	URL list	Week 1-2
Research funding/valuation data	Funding worksheet	Week 2
Compile customer logos/case studies	Evidence folder	Week 2-3
Monitor competitor news/PR	News log	Ongoing
Write market context summary	2-page summary	Week 2
Define segment profiles	Segment doc	Week 2
Review AI-extracted data for accuracy	Validation notes	Week 3-4

KW — Data Analyst

Owns: KPIs, Excel Modeling, Data Validation

Task	Deliverable	Due
Define 10 key KPIs with formulas	KPI spreadsheet	Week 1
Design Excel dashboard layout	Wireframe	Week 1-2
Build pricing comparison matrix	Pricing worksheet	Week 2-3
Build feature comparison matrix	Feature worksheet	Week 2-3
Calculate market share estimates	Sizing model	Week 3
Calculate growth rates, CAC	KPI calculations	Week 3-4
Validate AI-extracted pricing	Reviewed data	Week 3-4
Build final Excel dashboard	Production file	Week 4-5
Test all formulas/connections	QA checklist	Week 5

MS — Delivery Lead

Owns: PowerPoint, Visual Design, Final Deliverables

Task	Deliverable	Due
Create PowerPoint template	PPT template	Week 1

Task	Deliverable	Timeline
Design dashboard visual style	Style guide	Week 1-2
Build competitor profile slides	Slide template	Week 2
Create executive summary structure	PPT outline	Week 3
Translate Excel charts to PPT	Chart slides	Week 4
Write strategic recommendations	PPT content	Week 4-5
Create "next steps" slides	PPT content	Week 5
Final polish on all deliverables	Production PPT	Week 5-6
Document resources/tools used	Appendix	Week 5

Weekly Timeline

Week	AK	CM	KW	MS
1	Approve scope	Build list	Define KPIs	Templates
2	Review	Research	Dashboard	Style guide
3	Insights review	Validate	Matrices	Slides
4	Strategic input	News	Calculations	Build PPT
5	Final review	Final QA	Dashboard QA	Polish
6	Present	Support	Support	Deliver

RACI Matrix

Task	AK	CM	KW	MS
Competitor list	A	R	C	I
Market research	A	R	I	I
KPI definitions	A	C	R	I
Excel dashboard	A	I	R	C
PowerPoint	A	C	C	R
Final presentation	R	C	C	C

R = Responsible, A = Accountable, C = Consulted, I = Informed