

# Phase 1 Requirements Satisfaction Matrix

## Expected Deliverables (Per Project Scope)

Deliverable	Web App Option	Excel Option
Excel dashboard with data/analysis	<input checked="" type="checkbox"/> Export to Excel from web app	<input checked="" type="checkbox"/> Native Excel workbook
PowerPoint presentation	<input checked="" type="checkbox"/> Manual creation from web data	<input checked="" type="checkbox"/> Manual creation from Excel

**Key Insight:** Both options can produce the required Excel + PowerPoint deliverables. The difference is where the "live" intelligence system runs.

## Requirement 1: Understand Certify Health's Markets

Requirement	Web App	Excel + Cloud
Define "middle market"	Configuration in admin settings: revenue ranges, practice sizes, regions	Configuration sheet in workbook: same parameters
Growth driver hypotheses	AI-generated insights based on market data	Same AI backend, displayed in Excel
Adoption barrier analysis	Sentiment analysis from reviews/news	Same data, pivot table analysis
Key segment identification	Competitor tagging by segment (outpatient, behavioral, specialty)	Same tagging, filterable in Excel

**Satisfaction:**  Both options fully satisfy — The AI backend does the analysis work; delivery format differs.

## Requirement 2: Data & KPIs to Collect

Data/KPI	Collection Method	Web App Display	Excel Display
Market/Macro data	News APIs, analyst reports, manual input	Dashboard cards + trends	Summary sheet + sparklines
Market penetration	Estimated from customer logos, case studies	% charts by segment	Pivot chart
Competitor Products/Features	AI extraction from product pages	Feature matrix grid	Feature comparison table
ARR / ACV	Scraped pricing × estimated customers	Revenue estimates table	Revenue worksheet
Pricing/Contract models	AI extraction from pricing pages	Pricing comparison view	Pricing table
Growth/Churn rates	Calculated from headcount trends, reviews	Trend charts	Calculated columns
Funding Rounds/Valuations	Crunchbase API / manual entry	Funding timeline	Funding worksheet
Customer Acquisition Costs	Inferred from sales headcount, marketing spend	CAC estimates	CAC worksheet

**Satisfaction:**  Both options fully satisfy — Same data collected; different presentation.

## Requirement 3: Map Competitive Landscape

Requirement	Web App	Excel + Cloud
Identify direct & adjacent competitors	Discovery Agent with LLM classification	Same AI, results in Competitors sheet
Extract features, pricing, differentiators	Extraction Agent → Claims database	Same extraction → Excel tables
Build competitor matrix (quantitative)	Interactive matrix view with drill-down	Static matrix table with filters
Validate with qualitative sources	Notes field, analyst commentary import	Notes column, manual entry
Marketing/PR/Social monitoring	News scraper + social listener	Same data → News/PR worksheet

**Satisfaction:**  Both options fully satisfy — Web app offers drill-down; Excel offers familiarity.

## Requirement 4: Comparative Analysis

Requirement	Web App	Excel + Cloud
Calculate growth rates	Auto-computed in backend, displayed	Calculated columns in Excel
Feature overlap analysis	Visual feature matrix with % overlap	Conditional formatting matrix
Pricing vs. value insights	Scatter plots, AI-generated insights	Scatter chart + AI summary

<b>Regression analysis</b>	Backend Python (scikit-learn) → charts	Power Query + manual Excel regression
<b>Cluster analysis</b>	Backend clustering → segment visualization	Limited (would need Python add-in)
<b>Market share modeling</b>	Backend calculations → pie/bar charts	Pie/bar charts in Excel
<b>Gap identification</b>	AI-generated "white space" insights	Same AI insights in Excel
<b>Underserved segment discovery</b>	Segment heatmap	Conditional formatting matrix

#### Satisfaction:

- Web App:  **Full statistical analysis capability**
- Excel:  **Mostly satisfied** — Cluster analysis and advanced regression require manual work or add-ins

## Requirement 5: Visualization & Dashboards

Requirement	Web App	Excel + Cloud
<b>Visuals, charts, dashboards</b>	Interactive Recharts/D3.js	Excel charts + pivot charts
<b>Prioritize strategic moves</b>	AI-generated priority rankings	Same AI → Priority worksheet
<b>Segment targeting recommendations</b>	Visual segment matrix with recommendations	Recommendation summary sheet
<b>Tactics to utilize (pricing, etc.)</b>	AI-generated tactical playbook	Same AI → Tactics worksheet
<b>Product advancement priorities</b>	Feature gap analysis → roadmap view	Feature gap → prioritized list

#### Satisfaction:

- Web App:  **Rich interactivity** (heatmaps, drill-down, filters)
- Excel:  **Good but static** (charts are nice, but no true heatmaps without workarounds)

## Summary Comparison

Phase 1 Requirement	Web App	Excel + Cloud
Market understanding	<input checked="" type="checkbox"/> Full	<input checked="" type="checkbox"/> Full
Data/KPI collection	<input checked="" type="checkbox"/> Full	<input checked="" type="checkbox"/> Full
Competitive landscape mapping	<input checked="" type="checkbox"/> Full	<input checked="" type="checkbox"/> Full
Comparative analysis	<input checked="" type="checkbox"/> Full (Python backend)	<input type="triangle"/> Partial (no native clustering)
Visualizations	<input checked="" type="checkbox"/> Full (interactive)	<input type="triangle"/> Partial (static charts)
Excel deliverable	<input checked="" type="checkbox"/> Via export	<input checked="" type="checkbox"/> Native
PowerPoint deliverable	<input checked="" type="checkbox"/> Manual from data	<input checked="" type="checkbox"/> Manual from data

## Which Option for Phase 1?

If You Prioritize...	Choose...
Fastest path to Excel + PPT deliverable	Excel + Cloud
Advanced statistical analysis	Web App
Interactive presentations to execs	Web App
Analyst familiarity & ad-hoc analysis	Excel + Cloud
Long-term scalable platform	Web App

## Recommendation for Phase 1

**Excel + Cloud Backend** is the better fit because:

1. **Deliverable alignment:** Phase 1 explicitly requires "Excel dashboard" as a deliverable
2. **Faster delivery:** 6-8 weeks vs 10-12 weeks
3. **Analyst flexibility:** Allows ad-hoc analysis that web dashboards can't match
4. **Lower risk:** Excel is a known quantity; web dashboard is new

**Phase 2 can add the web dashboard** for ongoing monitoring and richer visualizations.

## Gap Analysis: What's Missing?

Gap	Impact	Mitigation
Cluster analysis in Excel	Can't easily segment competitors automatically	Use Python script output → paste into Excel

<b>Interactive heatmaps</b>	Excel conditional formatting is close but not true heatmaps	Accept limitation or add web view later
<b>Real-time drill-down</b>	Can't click a competitor and see all details	Use hyperlinks between sheets
<b>Multi-user collaboration</b>	Excel file locking issues	Use SharePoint/OneDrive with co-authoring