MSF Winter Clinic: Certify Health Team 1

Project Plan

Date: January 16, 2026

Minimal Working Prototype Due: January 26, 2026

Minimal Viable Product Due: February XX, 2026 (TBD)

Executive Summary

Build an AI-powered competitive intelligence system ("Certify Intel") that monitors 50+ healthcare IT competitors, extracts key data (pricing, features, customers), and delivers insights via an Excel dashboard with automated weekly refreshes and email alerts.

1. Project Objectives

1. Track 50+ competitors in middle-market healthcare IT
2. Collect 32 standardized data points per competitor
3. Automate data collection via web scraping + GPT extraction
4. Deliver insights through Excel dashboard with charts/pivots
5. Alert stakeholders on critical changes via email

2. Minimal Working Prototype vs. Minimal Viable Product

Minimal Working Prototype (Due: January 26)

A functional Excel workbook with complete data structure, 10-15 competitors manually populated, demonstrating the end-state dashboard design.

Component	Scope
Excel Dashboard	Structure complete, charts functional
Competitor Data	10-15 competitors, manually entered
Data Points	All 32 columns defined
Automation	None (manual entry)
Alerts	None

Minimal Viable Product (Due: Week of February 9)

A fully automated system with cloud backend, AI extraction, Power Query-connected Excel, and email alerts.

Component | Scope

Excel Dashboard	Production-ready with all views
Competitor Data	50+ competitors, auto-populated
Data Points	All 32 fields populated
Automation	Weekly scraping + extraction
Alerts	Email alerts on critical changes

3. Data Points to Collect (32 Total)

Core Data

Data Point	Source
Pricing / Contract Models	Pricing pages
Product Features	Product pages
Customer Logos / Count	Case studies, website
Funding / Valuation	Crunchbase, news
Hiring Trends	LinkedIn, job boards
Customer Reviews	G2, Capterra
News / PR Mentions	Google News, PR feeds

Customer & Market

Data Point	Source
Customer Acquisition Rate	Press releases, LinkedIn
Target Market Segments	Website messaging
Customer Size Focus	Pricing page, case studies
Geographic Focus	About page, job locations
Integration Partners	Integration pages

Company Health

Data Point	Source
Employee Count	LinkedIn
Employee Growth Rate	LinkedIn, archive
Headquarters Location	Website, LinkedIn
Year Founded	Website, Crunchbase
Leadership Team	About page, LinkedIn

Product & Positioning

Data Point | Source

|-----------|-------|
Tagline / Value Prop | Homepage
Differentiators | Website messaging
Product Categories | Product pages
Certifications | Security page
Mobile App Availability | App stores

Digital Presence

Data Point	Source
Website Traffic Estimate	SimilarWeb
Social Media Following	Social profiles
Blog Post Frequency	Blog page
Webinar/Event Activity	Events page
SEO Domain Authority	Moz, Ahrefs

Competitive Intelligence

Data Point	Source
Recent Product Launches	Blog, press releases
Partnership Announcements	Press releases
Awards / Recognition	Website, news
Acquisition History	Crunchbase, news
PE/VC Backers	Crunchbase

4. Team Roles

Role	Team Member	Primary Responsibility
Team Lead / Coordinator	Andrew Kimelman	Cross-team coordination, client communication
Product Development Lead	Connor Hickey	Backend engine, automation, Power Query
Research Lead	Kevin Way	Competitive landscape, data sourcing
Data Lead	Connor Maloney	Excel dashboard, data entry, KPIs
Delivery Lead	Mo Srouji	Visuals, charts, documentation

See "Certify_Health_Team_1_Task_Assignments.pdf" for detailed task assignments.

5. Timeline

Minimal Working Prototype Phase (January 5-26)

Week | Focus

|------|-------|

Week 1 (Jan 5-11) | Foundation: competitor criteria, data schema, layout

Week 2 (Jan 12-18) | Research & data structure

Week 3 (Jan 19-26) | Data population, Minimal Working Prototype delivery

Minimal Viable Product Phase (January 26 - February 9)

Week | Focus

|------|-------|

Week 4 (Jan 26-Feb 2) | Backend, AI integration, expanded data

Week 5 (Feb 3-9) | Automation, polish, final delivery

6. Key Dates

Date | Event

|------|-------|

January 5, 2026 | Project Start / Team Onboarding

January 26, 2026 | Minimal Working Prototype Due

January 27, 2026 | Executive Presentation Workshop

February 6-8, 2026 | Clinics Intensive Weekend

Week of February 9, 2026 | Final Presentations / Minimal Viable Product Due

7. Deliverables

Deliverable | Due Date

|------------|----------|

Minimal Working Prototype Excel Dashboard | January 26, 2026

Competitor Master List (50+) | January 26, 2026

Cloud Backend (Scraping + API) | February 6, 2026

Minimal Viable Product Excel Dashboard | February 9, 2026

Documentation Package | February 9, 2026

8. Success Criteria

Metric | Minimal Working Prototype | Minimal Viable Product

|--------|-------------------------|-----------------------|

Competitors tracked | 10-15 | 50+

Data points per competitor | 32 | 32

Data freshness | Manual | Weekly auto

Dashboard views | 3 basic | 5+ with charts

Alert capability | None | Email on changes