

# Certify Intel - Team Task Assignments

**Project:** Certify Intel

**Project Start:** January 5, 2026

**Minimal Working Prototype Due:** January 22, 2026

**Minimal Viable Product Due:** February 9, 2026

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## Part 1: Team Roles & Responsibilities

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### Product Development Lead

#### Role Description

The Product Development Lead is responsible for building the backend "engine" that powers the competitive intelligence system. This includes the cloud infrastructure, web scraping automation, AI-powered data extraction, and connecting the backend to the Excel dashboard via Power Query. This role ensures that raw competitor data flows automatically from websites into the Excel dashboard without manual intervention.

#### Primary Focus

- Building the automated data collection engine
- Integrating GPT-4 for intelligent data extraction
- Connecting backend to Excel dashboard
- Ensuring weekly automated refreshes work reliably

#### Tasks

##### Minimal Working Prototype Phase (January 5-22)

- ☐ Create Excel template structure with all 32 data columns
- ☐ Define data schema and column naming conventions
- ☐ Support Data Lead with technical data formatting questions
- ☐ Ensure Excel file is structured for future Power Query connection

##### Minimal Viable Product Phase (January 23 - February 9)

- ☐ Set up cloud infrastructure (AWS or Azure)
  - ☐ Deploy PostgreSQL database for competitor data storage
  - ☐ Build Playwright web scraper for competitor websites
  - ☐ Create FastAPI backend with REST endpoints
  - ☐ Integrate OpenAI GPT-4 API for data extraction
  - ☐ Build extraction prompts for each data category (pricing, features, etc.)
  - ☐ Create Power Query connection from Excel to backend API
  - ☐ Implement scheduled weekly scraping (Celery)
  - ☐ Build email alert system for critical changes
  - ☐ Write technical documentation for backend system
  - ☐ Conduct backend testing and debugging
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### Team Lead / Coordinator

#### Role Description

The Team Lead serves as the project's primary coordinator and the main point of contact between the client, advisors, and team members. This role ensures workstreams are aligned, removes blockers, facilitates decision-making, and keeps the project on track. The Team Lead has the authority to help any team member and makes final approval decisions on deliverables.

#### Primary Focus

- Cross-team coordination and communication
- Client and advisor relationship management
- Decision-making and approvals
- Ensuring deliverables meet quality standards

#### Tasks

### Minimal Working Prototype Phase (January 5-22)

- ☐ Kick off project with team alignment meeting
- ☐ Approve "middle market" definition and competitor criteria
- ☐ Review and prioritize initial competitor list
- ☐ Facilitate communication with client stakeholders
- ☐ Review and approve Minimal Working Prototype dashboard before delivery

### Minimal Viable Product Phase (January 23 - February 9)

- ☐ Conduct weekly status check-in meetings (30 minutes each)
  - ☐ Coordinate between team members when dependencies arise
  - ☐ Communicate progress updates to client and advisors
  - ☐ Review AI-generated insights for quality and relevance
  - ☐ Resolve blockers and escalate issues as needed
  - ☐ Attend Executive Presentation Workshop (January 27)
  - ☐ Lead intensive weekend sessions (February 6-8)
  - ☐ Conduct final Minimal Viable Product review and sign-off
  - ☐ Lead final presentation to client (week of February 9)
  - ☐ Facilitate handoff to summer team
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## Research Lead

### Role Description

The Research Lead is responsible for all competitive research activities. This role maps the competitive landscape, identifies who qualifies as a competitor, understands what solutions target customers currently use instead of Certify Health, and finds reliable data sources for each data point. The Research Lead's work forms the foundation that the entire dashboard is built upon.

### Primary Focus

- Defining the competitive landscape
- Identifying and qualifying competitors
- Understanding target customer buying behavior
- Finding and validating data sources
- Matching Certify Health products to competitor solutions

### Tasks

#### Minimal Working Prototype Phase (January 5-22)

- ☐ Define criteria for what qualifies as a competitor
- ☐ Create competitor qualification framework (direct versus adjacent)
- ☐ Identify initial list of 40+ competitors
- ☐ Map competitors to Certify Health product categories (Intake, Verification, Payments, etc.)
- ☐ Gather website URLs and key pages for each competitor
- ☐ Research target customer segments and what they currently use
- ☐ Initial data collection for 15 priority competitors

#### Minimal Viable Product Phase (January 23 - February 9)

- ☐ Complete competitive landscape map
  - ☐ Identify data sources for each of the 32 data points
  - ☐ Document where to find pricing information per competitor
  - ☐ Document where to find customer/logo information per competitor
  - ☐ Research funding and valuation data (Crunchbase, news)
  - ☐ Research hiring trends and employee counts (LinkedIn)
  - ☐ Validate AI-extracted data for accuracy
  - ☐ Monitor competitor news and announcements weekly
  - ☐ Identify gaps in available data and document limitations
  - ☐ Create research methodology documentation
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## Data Lead

### Role Description

The Data Lead is responsible for building and maintaining the Excel dashboard. This role takes the research from the Research Lead and translates it into structured data points that populate the dashboard. The Data Lead owns the data model, KPI calculations, and ensures the dashboard accurately reflects the competitive intelligence gathered.

### Primary Focus

- Building the Excel dashboard structure
- Translating research into standardized data points
- Creating KPI formulas and calculations
- Ensuring data accuracy and consistency
- Managing data entry and updates

### Tasks

#### Minimal Working Prototype Phase (January 5-22)

- ☐ Build Excel workbook structure with all sheets
- ☐ Create data entry sheet with 32 columns
- ☐ Define data types and validation rules for each column
- ☐ Populate 10-15 competitors with research data
- ☐ Build initial pivot tables for data analysis
- ☐ Create dropdown lists for standardized fields (Threat Level, Status, etc.)

#### Minimal Viable Product Phase (January 23 - February 9)

- ☐ Expand competitor data to all 40+ companies
  - ☐ Build pricing comparison matrix
  - ☐ Build feature comparison matrix
  - ☐ Create KPI formulas (growth rates, market share estimates, etc.)
  - ☐ Build market segment analysis views
  - ☐ Create conditional formatting rules for visual indicators
  - ☐ Test Power Query data refresh with Product Development Lead
  - ☐ Conduct data quality audit
  - ☐ Fix data inconsistencies and errors
  - ☐ Document data definitions and sources per column
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## Delivery Lead

### Role Description

The Delivery Lead is responsible for the visual presentation and documentation of the dashboard. This role focuses on making the dashboard visually compelling, easy to understand, and presentation-ready. The Delivery Lead also documents how the dashboard works so future users can understand and maintain it.

### Primary Focus

- Dashboard layout and visual design
- Charts, graphs, and data visualizations
- User experience and navigation
- Documentation and user guides

### Tasks

#### Minimal Working Prototype Phase (January 5-22)

- ☐ Design overall dashboard layout and navigation
- ☐ Create color scheme and visual style guide
- ☐ Design chart templates (bar, pie, line charts)
- ☐ Build dashboard summary/overview sheet
- ☐ Apply professional formatting and branding

#### Minimal Viable Product Phase (January 23 - February 9)

- ☐ Create advanced visualizations (heatmaps, comparison charts)
- ☐ Design competitor profile view layout
- ☐ Build threat level visualization
- ☐ Create market segment breakdown charts
- ☐ Design change log / alert history view
- ☐ Write user guide documentation
- ☐ Create "How to Use" instructions sheet

- [ ] Document chart and graph mechanics
- [ ] Polish final dashboard visuals
- [ ] Prepare presentation materials for stakeholders
- [ ] Support preparation for Clinics Intensive Weekend (February 6-8)

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## Part 2: Tasks by Implementation Order

The following is a logical sequence of all tasks, grouped by phase and ordered by dependencies.

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### Minimal Working Prototype Phase: January 5-22 (Logical Order)

#### Week 1 (January 5-11) — Foundation

Order	Task	Role
1	Kick off project with team alignment meeting	Team Lead / Coordinator
2	Define criteria for what qualifies as a competitor	Research Lead
3	Create competitor qualification framework	Research Lead
4	Approve "middle market" definition and competitor criteria	Team Lead / Coordinator
5	Create Excel template structure with all 32 data columns	Product Development Lead
6	Define data schema and column naming conventions	Product Development Lead
7	Design overall dashboard layout and navigation	Delivery Lead
8	Create color scheme and visual style guide	Delivery Lead

#### Week 2 (January 12-18) — Research & Data Structure

Order	Task	Role
9	Identify initial list of 40+ competitors	Research Lead
10	Map competitors to Certify Health product categories	Research Lead
11	Gather website URLs and key pages for each competitor	Research Lead
12	Build Excel workbook structure with all sheets	Data Lead
13	Create data entry sheet with 32 columns	Data Lead
14	Define data types and validation rules for each column	Data Lead
15	Create dropdown lists for standardized fields	Data Lead
16	Design chart templates	Delivery Lead

#### Week 3 (January 19-22) — Data Population & Minimal Working Prototype Delivery

Order	Task	Role
17	Research target customer segments	Research Lead
18	Initial data collection for 15 priority competitors	Research Lead
19	Populate 10-15 competitors with research data	Data Lead
20	Build initial pivot tables for data analysis	Data Lead
21	Support Data Lead with technical data formatting	Product Development Lead
22	Build dashboard summary/overview sheet	Delivery Lead
23	Review and prioritize initial competitor list	Team Lead / Coordinator
24	Ensure Excel file is structured for future Power Query	Product Development Lead
25	Apply professional formatting and branding	Delivery Lead
26	Facilitate communication with client stakeholders	Team Lead / Coordinator
27	Review and approve Minimal Working Prototype dashboard	Team Lead / Coordinator

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### Minimal Viable Product Phase: January 23 - February 9 (Logical Order)

#### Week 4 (January 23-26) — Backend Foundation & Expanded Research

Order	Task	Role
28	Set up cloud infrastructure (AWS or Azure)	Product Development Lead
29	Deploy PostgreSQL database	Product Development Lead
30	Complete competitive landscape map	Research Lead
31	Identify data sources for each of the 32 data points	Research Lead

32	Document where to find pricing information per competitor	Research Lead
33	Build Playwright web scraper	Product Development Lead
34	Create FastAPI backend with REST endpoints	Product Development Lead
35	Expand competitor data to all 40+ companies	Data Lead
36	Conduct weekly status check-in	Team Lead / Coordinator

### Week 5 (January 27 - February 2) — AI Integration & Analysis

Order	Task	Role
37	Integrate OpenAI GPT-4 API for data extraction	Product Development Lead
38	Build extraction prompts for each data category	Product Development Lead
39	Research funding and valuation data	Research Lead
40	Research hiring trends and employee counts	Research Lead
41	Build pricing comparison matrix	Data Lead
42	Build feature comparison matrix	Data Lead
43	Create KPI formulas	Data Lead
44	Validate AI-extracted data for accuracy	Research Lead
45	Create advanced visualizations	Delivery Lead
46	Design competitor profile view layout	Delivery Lead
47	Coordinate between team members	Team Lead / Coordinator
48	Attend Executive Presentation Workshop (January 27)	Team Lead / Coordinator
49	Conduct weekly status check-in	Team Lead / Coordinator

### Week 6 (February 3-9) — Automation, Polish, Delivery

Order	Task	Role
50	Create Power Query connection from Excel to backend	Product Development Lead
51	Implement scheduled weekly scraping	Product Development Lead
52	Build email alert system for critical changes	Product Development Lead
53	Test Power Query data refresh	Data Lead
54	Monitor competitor news weekly	Research Lead
55	Create research methodology documentation	Research Lead
56	Conduct data quality audit	Data Lead
57	Fix data inconsistencies and errors	Data Lead
58	Document data definitions and sources	Data Lead
59	Build threat level visualization	Delivery Lead
60	Create market segment breakdown charts	Delivery Lead
61	Write user guide documentation	Delivery Lead
62	Create "How to Use" instructions sheet	Delivery Lead
63	Polish final dashboard visuals	Delivery Lead
64	Write technical documentation for backend	Product Development Lead
65	Conduct backend testing and debugging	Product Development Lead
66	Lead intensive weekend sessions (February 6-8)	Team Lead / Coordinator
67	Support Clinics Intensive Weekend	Delivery Lead
68	Review AI-generated insights	Team Lead / Coordinator
69	Conduct final Minimal Viable Product review and sign-off	Team Lead / Coordinator
70	Prepare presentation materials	Delivery Lead
71	Lead final presentation to client (week of February 9)	Team Lead / Coordinator
72	Facilitate handoff to summer team	Team Lead / Coordinator

### Key Dates Summary

Date	Event
January 5, 2026	Project Start / Team Onboarding
January 22, 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