MSF Winter Clinic: Certify Health Team 1

Team Task Assignments

Date: January 16, 2026

Minimal Working Prototype Due: January 26, 2026

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

Part 1: Team Roles & Responsibilities

Product Development Lead - Connor Hickey

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

Minimal Working Prototype Phase Tasks (January 5-26)

* Create Excel Template 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 Tasks (January 26 - February 9)

* Set up cloud infrastructure
* Deploy PostgreSQL database for competitor data storage
* Build Playwright web scraper for competitor websites
* Create FastAPI backend with REST endpoints
* Integrate OpenAI GPT API for data extraction
* Build extraction prompts for each data category
* Create Power Query connection from Excel to backend API

* Implement scheduled weekly scraping

* Build email alert system for critical changes

* Write technical documentation for backend system

* Conduct backend testing and debugging

Team Lead / Coordinator - Andrew Kimelman

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.

Primary Focus

* Cross-team coordination and communication

* Client and Advisor relationship management

* Decision-making and approvals

* Ensuring deliverables meet quality standards

Minimal Working Prototype Phase Tasks (January 5-26)

* Ensure team alignment on tasks

* 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

Minimal Viable Product Phase Tasks (January 26 - February 9)

* Conduct weekly status check-in meetings

* Coordinate between team members when dependencies arise

* Communicate progress updates to client and advisors

* Review AI-generated insights for quality

* Attend Executive Presentation Workshop (January 27)

* Lead intensive weekend sessions (February 6-8)

* Conduct final review and sign-off

* Lead final presentation to client

Research Lead - Kevin Way

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.

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

Working Prototype Phase Tasks (January 5-26)

* Define criteria for what qualifies as a competitor
* Create competitor qualification framework
* Identify initial list of 40+ competitors
* Map competitors to Certify Health product categories
* Gather website URLs and key pages for each competitor
* Research target customer segments
* Initial data collection for 15 priority competitors

Minimal Viable Product Phase Tasks (January 26 - February 9)

* Complete competitive landscape map
* Identify data sources for each of the 32 data points
* Document where to find pricing information
* Document where to find customer/logo information
* Research funding and valuation data
* Research hiring trends and employee counts
* Validate AI-extracted data for accuracy
* Monitor competitor news weekly
* Create research methodology documentation

Data Lead - Connor Maloney

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.

Primary Focus

* Creating the Excel dashboard structure
* Translating research into standardized data points

* Creating KPI formulas and calculations

* Ensuring data accuracy and consistency

Working Prototype Phase Tasks (January 16 - 26)

* Build Excel workbook structure with all sheets

* Create data entry sheet with 32 columns

* Define data types and validation rules

* Populate 10-15 competitors with research data

* Build initial pivot tables for data analysis

* Create dropdown lists for standardized fields

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

* Expand complete competitor data to all 50+ companies

* Build pricing comparison matrix

* Build feature comparison matrix

* Create KPI formulas

* Build market maps/segment analysis views

* Create conditional formatting rules

* Conduct data quality audit

* Document data definitions and sources

Delivery Lead - Mo Srouji

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.

Primary Focus

* Design the Excel Dashboard layout and visual tools

* Construct charts, graphs, and data visualizations

* Enhance the user experience and navigation

* Write documentation and user guides

Minimal Working Prototype Phase Tasks (January 5-22)

* Finalize overall dashboard layout and navigation

* Create color scheme, branding, and visual style guide

* Finalize chart templates

* Build dashboard summary/overview sheet

* Apply professional formatting and branding

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

* Create advanced visualizations
* Design competitor profile view layout
* Build threat level visualization
* Create market segment breakdown charts
* Write user guide documentation
* Create "How to Use" instructions sheet
* Polish final dashboard visuals
* Prepare presentation materials
* Support Clinics Intensive Weekend

Part 2: Key Dates Summary

* 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