

Statement of Work (SOW)

Certify Intel — Competitive Intelligence Platform

Document Version: 1.0

Effective Date: January 16, 2026

Prepared For: Certify Health (Internal)

1. Project Overview

Project Name: Certify Intel

Duration: January 16 - February 9, 2026 (24 days)

Objective: Deliver an automated competitive intelligence system that monitors 40+ healthcare IT competitors and provides actionable insights via Excel dashboard.

2. Scope of Work

2.1 In Scope

Deliverable	Description
Excel Dashboard	Production-ready workbook with competitor data, charts, and analysis views
Cloud Backend	Automated scraping and AI extraction system
Data Collection	32 standardized data points per competitor
Alert System	Email notifications on critical competitor changes
Documentation	User guide and technical documentation

2.2 Out of Scope

- Web application / custom UI (future phase)
 - Real-time monitoring (weekly refresh only)
 - Competitors outside healthcare IT
 - Historical data prior to project start
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3. Deliverables

#	Deliverable	Due Date	Owner
1	MWP Excel Dashboard	Jan 19, 2026	KW/MS
2	Competitor Master List (40+)	Jan 22, 2026	CM
3	Cloud Backend (Scraping + API)	Jan 30, 2026	CH
4	GPT-4 Extraction Pipeline	Feb 2, 2026	CH
5	MVP Excel Dashboard	Feb 9, 2026	KW/CH
6	Email Alert System	Feb 9, 2026	CH
7	Documentation Package	Feb 9, 2026	MS

4. Acceptance Criteria

MWP (January 19)

- [] Excel workbook opens without errors
- [] 32 data columns defined and labeled
- [] 10-15 competitors populated with data
- [] At least 3 chart/visualization views
- [] Approved by AK

MVP (February 9)

- [] 40+ competitors with populated data
- [] Automated weekly data refresh working
- [] Power Query connection to backend functional
- [] Email alerts triggering on test changes

- All 32 data points populated for top 20 competitors
 - Documentation complete
 - Final approval by AK
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5. Team & Responsibilities

Role	Member	Responsibilities
Project Sponsor	AK	Approvals, strategic direction
Product Dev Lead	CH	Backend, automation, architecture
Research Lead	CM	Competitor discovery, data sourcing
Data Analyst	KW	Excel dashboard, KPIs, analysis
Delivery Lead	MS	Documentation, presentation, visuals

6. Timeline Summary

Week	Dates	Focus
Week 1	Jan 16-19	MWP delivery
Week 2	Jan 20-26	Backend foundation
Week 3	Jan 27 - Feb 2	AI integration
Week 4	Feb 3-9	MVP delivery

7. Assumptions

1. Team members available as scheduled
 2. Access to OpenAI API (GPT-4) provided
 3. Cloud hosting (AWS/Azure) provisioned
 4. Competitor websites accessible for scraping
 5. Existing competitor research (CSVs) accurate and usable
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8. What Certify Health Will Receive

Upon completion, Certify Health will receive:

1. **Excel Dashboard** — Production-ready workbook with:
 - Competitor overview (40+ companies)
 - Pricing comparison matrix
 - Feature comparison matrix
 - Market segment analysis
 - Change log / alert history
 2. **Automated Backend** — Cloud-hosted system that:
 - Scrapes competitor websites weekly
 - Extracts data using GPT-4
 - Updates Excel via Power Query
 - Sends email alerts on changes
 3. **Documentation** — Including:
 - User guide for Excel dashboard
 - Technical documentation for backend
 - Data dictionary (32 fields)
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9. Sign-Off

Role	Name	Signature	Date
Project Sponsor	AK	_____	_____
Product Dev Lead	CH	_____	_____

This SOW establishes the agreement for the Certify Intel project deliverables.