

Certify Intel - Project Plan

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Executive Summary

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

Milestone	Due Date	Description
MWP	Jan 19, 2026	Minimal Working Prototype — Excel structure with manual data
MVP	Feb 9, 2026	Minimal Viable Product — Automated scraping + Excel dashboard

1. Objectives

1. **Track 40+ competitors** in middle-market healthcare IT
2. **Collect 32 standardized data points** per competitor
3. **Automate data collection** via web scraping + GPT-4 extraction
4. **Deliver insights** through Excel dashboard with charts/pivots
5. **Alert stakeholders** on critical changes via email

2. MWP vs. MVP Definitions

Minimal Working Prototype (MWP) — Due Jan 19

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

Component	MWP Scope
Excel Dashboard	<input checked="" type="checkbox"/> Structure complete, charts placeholder
Competitor Data	<input checked="" type="checkbox"/> 10-15 competitors, manually entered
Data Points	<input checked="" type="checkbox"/> All 32 columns defined
Automation	<input checked="" type="checkbox"/> None (manual entry)
Alerts	<input checked="" type="checkbox"/> None

Purpose: Validate dashboard design, data schema, and stakeholder alignment before building automation.

Minimal Viable Product (MVP) — Due Feb 9

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

Component	MVP Scope
Excel Dashboard	<input checked="" type="checkbox"/> Production-ready with all views
Competitor Data	<input checked="" type="checkbox"/> 40+ competitors, auto-populated
Data Points	<input checked="" type="checkbox"/> All 32 fields populated
Automation	<input checked="" type="checkbox"/> Weekly scraping + extraction
Alerts	<input checked="" type="checkbox"/> Email alerts on critical changes
Backend	<input checked="" type="checkbox"/> Cloud-hosted (AWS/Azure)

Purpose: Deliver autonomous competitive intelligence with minimal ongoing manual effort.

3. Data Points to Collect (32 Total)

Core Data (7 points) — From Your Requirements

#	Data Point	Description	Source
1	Pricing / Contract Models	List prices, per-user, tiers	Pricing pages

2 Product Features	Feature lists, capabilities	Product pages
3 Customer Logos / Count	Named customers, quantity	Case studies, website
4 Funding / Valuation	Investment rounds, amounts	Crunchbase, news
5 Hiring Trends	Open roles, growth signals	LinkedIn, job boards
6 Customer Reviews	Ratings, sentiment	G2, Capterra
7 News / PR Mentions	Press releases, announcements	Google News, PR feeds

Customer & Market (5 points)

#	Data Point	Description	Source
8	Customer Acquisition Rate	New customers announced	Press releases, LinkedIn
9	Target Market Segments	Dental, specialty, behavioral, etc.	Website messaging
10	Customer Size Focus	SMB, mid-market, enterprise	Pricing page, case studies
11	Geographic Focus	US regions, international	About page, job locations
12	Integration Partners	EHR, PM, billing integrations	Integration pages

Company Health (5 points)

#	Data Point	Description	Source
13	Employee Count	Current headcount	LinkedIn
14	Employee Growth Rate	YoY headcount change	LinkedIn, archive
15	Headquarters Location	HQ city/state	Website, LinkedIn
16	Year Founded	Company age	Website, Crunchbase
17	Leadership Team	CEO, CRO, CPO names	About page, LinkedIn

Product & Positioning (5 points)

#	Data Point	Description	Source
18	Tagline / Value Prop	Main marketing message	Homepage
19	Differentiators	Claimed advantages	Website messaging
20	Product Categories	Intake, verification, payments, etc.	Product pages
21	Certifications	HIPAA, SOC2, etc.	Security page
22	Mobile App Availability	iOS, Android apps	App stores

Digital Presence (5 points)

#	Data Point	Description	Source
23	Website Traffic Estimate	Monthly visits	SimilarWeb (from existing data)
24	Social Media Following	LinkedIn, Twitter followers	Social profiles
25	Blog Post Frequency	Content velocity	Blog page
26	Webinar/Event Activity	Speaking, hosting events	Events page, LinkedIn
27	SEO Domain Authority	Search ranking strength	Moz, Ahrefs

Competitive Intelligence (5 points)

#	Data Point	Description	Source
28	Recent Product Launches	New features announced	Blog, press releases
29	Partnership Announcements	New alliances	Press releases
30	Awards / Recognition	Industry awards	Website, news
31	Acquisition History	Companies acquired	Crunchbase, news
32	PE/VC Backers	Investor names	Crunchbase

4. Team Roles & RACI Matrix

Team Members

ID	Name	Role	Primary Responsibility
CH	Connor	Product Dev Lead	Software, automation, architecture
AK	—	Project Sponsor	Approvals, strategic direction
CM	—	Research Lead	Competitor discovery, validation
KW	—	Data Analyst	Excel, KPIs, analysis
MS	—	Delivery Lead	Dashboard design, documentation

RACI Matrix

Deliverable	CH	AK	CM	KW	MS
Project Plan	R	A	C	I	I
Competitor List	C	A	R	I	I
Data Collection Schema	R	A	C	R	C
Excel Dashboard (MWP)	C	A	I	R	R
Backend Automation	R	I	I	C	I
Data Validation	C	A	R	R	I
Final Dashboard (MVP)	R	A	C	R	C
Documentation	C	A	C	C	R
Stakeholder Presentation	I	R	C	C	R

R = Responsible, A = Accountable, C = Consulted, I = Informed

5. Weekly Milestones

Week 1: Jan 16-19 (MWP)

Owner	Deliverable
CH	Excel template structure, data schema
CM	Compile 40+ competitor list with URLs
KW	Populate 10-15 competitors manually
MS	Dashboard layout and chart design
AK	Review and approve MWP

Week 2: Jan 20-26

Owner	Deliverable
CH	Backend setup (database, API)
CH	Basic web scraper (Playwright)
CM	Complete competitor research (all 40+)
KW	Expand data entry to 25 competitors
MS	Refine dashboard visuals

Week 3: Jan 27 - Feb 2

Owner	Deliverable
CH	GPT-4 extraction integration
CH	Power Query connection to backend
CM	Validate AI-extracted data
KW	Build pivot tables, KPI calculations
MS	Create documentation drafts

Week 4: Feb 3-9 (MVP)

Owner	Deliverable
CH	Automated weekly refresh
CH	Email alert system
CM	Final data validation
KW	Dashboard QA, formula testing
MS	Final polish, presentation prep
AK	MVP sign-off

6. Product Roadmap

Start → MWP (Jan 16-19)

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Day 1 (Fri Jan 16)
└─ CH: Create Excel template structure
└─ CM: Export/finalize competitor list
└─ KW: Begin manual data entry

Day 2-3 (Sat-Sun Jan 17-18)
└─ CH: Complete data schema (32 columns)
└─ KW: Populate 10-15 competitors
└─ MS: Design dashboard charts
└─ CM: Gather initial competitor data

Day 4 (Mon Jan 19) — MWP DUE
└─ KW: Finalize MWP dashboard
└─ MS: Polish visuals
└─ AK: Review and approve

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MWP → MVP (Jan 20 - Feb 9)

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Week 2 (Jan 20-26): Backend Foundation
└─ CH: Deploy PostgreSQL database
└─ CH: Build Playwright web scraper
└─ CH: Create FastAPI endpoints
└─ CM: Continue competitor research

Week 3 (Jan 27 - Feb 2): AI Integration
└─ CH: Integrate GPT-4 extraction
└─ CH: Connect Excel via Power Query
└─ CM: Validate extracted data
└─ KW: Build analysis views

Week 4 (Feb 3-9): Automation & Polish
└─ CH: Scheduled weekly scraping
└─ CH: Email alert triggers
└─ KW: Final dashboard QA
└─ MS: Documentation complete
└─ ALL: MVP delivery

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7. Deliverables Summary

#	Deliverable	Owner	Due
1	Project Plan (this document)	CH	Jan 16
2	RACI Matrix	CH	Jan 16
3	Statement of Work (SOW)	CH/MS	Jan 17
4	Product Roadmap (Start→MWP)	CH	Jan 16
5	Product Roadmap (MWP→MVP)	CH	Jan 16
6	MWP Excel Dashboard	KW/MS	Jan 19
7	MVP Automated System	CH	Feb 9
8	Final Documentation	MS	Feb 9

8. Risks & Mitigations

Risk	Impact	Mitigation
Competitor sites block scraping	High	Use rotating proxies, respect rate limits
GPT-4 extraction errors	Medium	Human validation queue, confidence thresholds
Timeline too aggressive	High	Prioritize core 20 competitors, expand later
Excel performance issues	Medium	Limit to 50 competitors, optimize queries

9. Success Criteria

Metric	MWP Target	MVP Target
Competitors tracked	10-15	40+
Data points per competitor	32	32
Data freshness	Manual	Weekly auto

Dashboard views	3 basic	5+ with charts
Alert capability	None	Email on changes

*Document prepared by: CH (Product Development Lead)
For internal review — pending AK approval*