Launch Plan for *Clerky* – AI-Driven Clinical Consultation Platform

Company Structure & Registration in the UK

- **Choose the Right Structure:** Form a private **limited company (Ltd)** in the UK. An Ltd is ideal for startups seeking investment – it provides limited liability and allows issuing shares to founders and investorsgov.uk. This structure is more suitable than sole tradership or partnership given plans to raise venture capital.

- **Steps to Incorporate:**

    1. **Choose a Name:** Select a unique company name and verify availability via Companies Housegov.uk. Avoid names that conflict with existing trademarks or companies.

    2. **Appoint Directors & Shareholders:** You need at least one director; both you and your wife can be directors. List yourselves as initial shareholders (owners) with an agreed share splitgov.uk. You will also declare Persons with Significant Control (anyone over 25% shares)gov.uk – likely both founders.

    3. **Prepare Documents:** Use standard "memorandum and articles of association" (Companies House provides model articles)gov.uk. These outline how the company is governed.

    4. **Register with Companies House:** Provide your **registered office address** (this will be public) and select a **SIC code** (business classification) during registrationgov.uk. For a healthtech software company, a suitable SIC code is **62012 – Business and domestic software development**resources.companieshouse.gov.uk. You can complete registration online with a small fee (~£12) and usually get incorporation within 24 hours.

    5. **Post-Incorporation HMRC Setup:** Within **3 months of starting business activities**, register the company with HM Revenue & Customs for **Corporation Tax**1stformations.co.uk. (Companies House often notifies HMRC, but you should ensure you're registered). Set up a Government Gateway account and add Corporation Tax to your business tax accountgov.uk. If you plan to hire employees (including yourselves drawing salary), also register for **PAYE**. You can defer VAT registration until revenue nears the £85k threshold, since early on you may not need to charge VAT.

6. **Other Compliance:** Once registered, note your company number and Unique Taxpayer Reference (UTR) from HMRC. Mark key filing deadlines: annual Confirmation Statement, annual accounts, and company tax return. Keep proper records from day onegov.ukgov.uk.

- **Consider Tax Schemes:** As a UK startup engaged in R&D, you likely qualify for **R&D Tax Credits**, which can refund up to **33%** of eligible development costsseedlegals.comseedlegals.com. Plan to track R&D expenses (developer fees, cloud services, etc.) to reclaim a cash credit – a valuable funding boost for tech startups. Also consider applying for **SEIS/EIS (Seed Enterprise Investment Scheme)** advance assurance to attract investors. Under SEIS, angel investors can get **50% income tax relief** on investments (up to £200k per year), which hugely incentivizes themukbaa.org.uk. Securing SEIS/EIS status from HMRC in advance will give potential investors confidence that their stake in *Clerky* will qualify for these tax reliefsseedlegals.com.

Co-Founder Setup and Equity Distribution

- **Co-Founder Roles:** Legally, you can appoint your wife as a **director and co-founder** in the new company. There is no restriction on spouses being co-directors – *"no reasons why any individual, including a spouse, cannot be a director"*freelanceinformer.com. Both of you should be listed as directors on Companies House and share the fiduciary duties (acting in the company's best interest, keeping records, etc.).

- **Equity Shareholding:** Allocate shares to both founders. Many husband-wife startups choose a 50/50 split for simplicity and fairness, but you may adjust based on roles or initial contributions. Ensure that the share allocation gives both of you significant ownership and that each holds over 25% if you want joint control (this will also list both as PSCs – Persons of Significant Control). Document the share issuance in the **cap table** (e.g. 1000 shares split between you and your wife accordingly).

- **Founders' Agreement:** Even as a married couple, treat the business professionally – draft a **founders' agreement (co-founder agreement)** to define each person's role, decision-making powers, and handling of possible future disputeshelp.seedlegals.comhelp.seedlegals.com. This agreement should cover: roles and responsibilities in day-to-day operations, what happens if one founder leaves or if there is a disagreement, non-compete and confidentiality obligations, and equity vesting terms if applicable. Having such an agreement *"protects each founder's interests… and sets out what's been agreed"* about the business structure and operationsharperjames.co.uk. It might feel unnecessary now, but it's vital to *"plan for the worst while hoping for the best,"* even with familyhelp.seedlegals.com. (For example, in case of divorce or one founder wanting to exit, this document will save a lot of trouble.)

- **Employment vs. Founder Status:** If your wife will also be an **employee** (drawing a salary for day-to-day work), you can formalize that with an employment contract. In early stages, many founders forgo salary (or take a minimal salary) until funding allows – in such cases, a "Founders' Pledge" agreement can be used, which basically sets salary as £0 but records that she's contributing as a co-founderhelp.seedlegals.com. Once you raise funds and decide to pay yourselves, you can update to a proper **Founder Service Agreement** that doubles as an employment contract (with defined salary, duties, etc.)help.seedlegals.com. This ensures clarity that your wife is both an owner and an employee with defined terms.

- **Issue Share Certificates & Filings:** After incorporation, issue share certificates to yourself and your wife for the allotted shares. Update the company's statutory register of members with both founders. If you didn't add your wife during initial registration, you can **allot shares** to her (and file a return of allotment (SH01) to Companies House) or transfer some of your shares to her (file a stock transfer form). It's simplest to incorporate with both of you as initial shareholders to avoid extra filings.

Banking and Financial Setup

- **Business Bank Account:** Open a dedicated **business bank account** in the company's name soon after incorporation. This keeps personal and company finances separate (a legal requirement for an Ltd's accounting). Many UK startups choose digital challenger banks for ease: for example, **Starling Bank** offers a free business account with a quick online setupwise.com. Starling (and similar options like Monzo Business, Tide, or Revolut Business) have benefits such as instant payment notifications, no monthly fees, and integration with accounting toolswise.com. Traditional banks (Barclays, HSBC, NatWest) also offer startup accounts (often fee-free for 12-18 months)wise.comwise.com, but app-based banks tend to be more convenient for a small tech business. Ensure both founders (directors) are listed as authorized signatories on the account.

- **Accounting & Bookkeeping:** Set up a cloud-based **accounting software** to manage invoicing, expenses, and tax filings. Solutions like **Xero, QuickBooks, or FreeAgent** are popular for UK startupsvirtue.accountants. These tools will help you stay compliant with HMRC and handle VAT if you register latervirtue.accountants. Many online banks integrate with these (for example, Starling integrates with Xero/QuickBooks for automatic transaction syncingwise.com). Pick one and begin logging all expenses related to *Clerky* (software subscriptions, prototype hosting costs, etc.) from day one. This will simplify preparing annual accounts and R&D tax credit claims. You may also consider engaging a part-time accountant or using an affordable service for annual filings, but initially the software and some learning should suffice.

- **Payment Processing Setup:** Although *Clerky* will initially target NHS institutions and clinicians (who may pay via invoices or institutional procurement), set up online

payment accounts in advance for flexibility. Create a **Stripe** account – Stripe is a developer-friendly payment gateway widely used by startups for handling credit card transactionskonnectify.cokonnectify.co. It's easy to integrate into web platforms and *"has become a default choice for businesses looking for an easy-to-integrate, scalable payment system"*konnectify.co. Also consider setting up **PayPal Business** for any clients who prefer it; PayPal is straightforward for one-off or subscription payments and some customers trust it. Even if these payment channels won't be used until you start charging users, having them ready will enable you to quickly pilot paid features or accept early revenues (for example, if you decide to charge a private clinic or individual clinicians outside the NHS). Keep in mind transaction fees (Stripe ~1.4%+20p for UK cards; PayPal ~2.9%+30p) when pricing your service in the future.

- **Operational Tools:** Leverage other low-cost tools to streamline operations. For example, use **Gmail/Google Workspace** or **Microsoft 365** for your company email (you can set up yourname@clerky.com once you have a domain). These suites also provide shared calendars, cloud storage for documents (business plans, technical specs), and basic collaboration tools. As a small founding team, set up a simple **project management** tracker (Trello or Asana have free tiers) to organize development tasks around the prototype. Early organization will pay off once you have additional developers or contractors working on the project.

- **Financial Planning:** Open a **business savings account** or use accounting software to earmark a portion of any funds you put in as founders for taxes (e.g. if you eventually have to charge VAT or pay corporation tax on profits). Given you plan to seek funding, also maintain a **cap table** document from the start (listing share ownership) and keep it updated with any new equity. This will be needed when talking to investors. A tool like **SeedLegals** or **Carta** can help manage your cap table and even handle issuing shares to investors down the line, but an Excel/Google Sheet works in early days.

Legal Agreements and Compliance

- **Founders' Agreement:** As mentioned, put a **founders' agreement** in place between you and your wife. This document will outline how major decisions are made (consensus, or perhaps each in charge of certain domains), what happens if one founder exits, and how shares or IP are handled in that casehelp.seedlegals.com. It's essentially a prenuptial for the business – *"a baseline for how your co-founder relationships will work"*, clarifying roles and protecting against future disputeszoppi.co.uk. You can find templates or use startup legal services (SeedLegals, Cooley GO, etc.) to draft this.

- **Shareholders' Agreement:** As soon as you plan to bring on outside investors or if you issue shares to anyone beyond the two of you, draft a **shareholders' agreement**. This will include provisions on pre-emption rights (existing shareholders' right to maintain their stake in new funding rounds), drag-along and tag-along rights

(ensuring minority shareholders are protected or can be forced to sell under certain conditions alongside majority, which investors will expect), and founder vesting schedules if not already handled. Since initially only you two are shareholders, this can be combined with the founders' agreement, but be prepared to create one when an investor comes on board.

- **Intellectual Property (IP) Ownership:** Ensure that all IP created for *Clerky* is owned by the company. Since you and your wife are founders, formally **assign any pre-existing IP** (the prototype code, designs, etc. that you've created in your spare time) to the company. You can do this with a simple IP assignment agreement. This way the company clearly owns the prototype and technology, which investors and partners will expect. Going forward, *anyone* who contributes to the product (contract developers, designers, etc.) must sign agreements to transfer IP to the company. Note that in the UK, works created by **employees** in the course of their job automatically belong to the employer (though it's still wise to have an IP clause in employment contracts)legalnodes.com. However, **contractors retain ownership** of their work by default – thus you need a contract to assign their work's IP to *Clerky*legalnodes.comlegalnodes.com. When engaging any freelancer or agency, have them sign an **Independent Contractor Agreement** with clear IP assignment and confidentiality clauses. This ensures the code or content they produce is legally yours. SeedLegals, for example, offers a template "Consultant/Contractor agreement" that covers IP transferseedlegals.com.

- **Contractor and Employee Agreements:** For any future **hires**, even short-term contractors, draft basic agreements. Key elements: scope of work, payment terms, confidentiality (they must keep patient data and your proprietary info secret), and IP assignment as noted. Also include that contractors must abide by data protection laws since you'll handle sensitive medical data. For employees (when you have the budget to hire developers or staff), use a standard UK employment contract that includes confidentiality and invention assignment clauseslegalnodes.com. Clearly outline roles (e.g. software developer, marketing manager) and perhaps create an **employee handbook** down the line for company policies, once the team grows.

- **Non-Disclosure Agreements (NDAs):** Use NDAs when sharing sensitive information with outside parties before you're ready. For instance, if you discuss the technology with a hospital's innovation department or another company for integration, or when interviewing potential hires/freelancers who will see the prototype, have an NDA in place. This ensures they can't misuse your idea or data. You can use a simple one-page mutual NDA template (mutual if both sides share info, or one-way if only they receive info). This will protect any unpublished know-how of *Clerky*. Keep in mind that while NDAs are common, some investors (VCs) may refuse to sign NDAs at pitch stage – typically you won't need them for standard pitches that don't reveal source code or secret sauce.

- **Regulatory Compliance (Medical Software):** *Clerky* is intended for clinical use, so plan early for regulatory requirements. In the UK, software that provides clinical decision support can be classified as a **Medical Device** (likely Class IIa under UKCA/CE rules, as your business case notedfile-2cw9tcjlojpxy6vu9chyzl). This

means eventually you will need to go through the MHRA (Medicines and Healthcare products Regulatory Agency) for approval/registration of the software as a medical device. Early on, you can engage with a regulatory consultant or explore the **MHRA's guidance for stand-alone software**. As a startup, you might leverage initiatives like the **NHS AI Lab's Regulatory Sandbox** (if available) to get advice on how to meet requirements. Key things to implement from the start: a **quality management process** for your software development (document your testing and validation of the AI recommendations), and monitoring for safety issues. Also, since *Clerky* will deal with patient data (via consultation transcription and EHR notes), **data protection** is paramount. Ensure compliance with **UK GDPR** – for example, any patient data used by the AI must be stored and processed securely. If using cloud services, choose providers with NHS-approved security standards (such as Azure or AWS with UK data centers). You may need to register with the ICO (Information Commissioner's Office) as a data processor once you handle real personal health data. While a full regulatory approval might be a longer-term step, begin building these considerations (accuracy, audit trails, data security) into the product now – it will pay off when conducting NHS trials. Your business case acknowledges the regulatory challenge but suggests leveraging the UK's AI-friendly stance and possibly targeting markets like the US FDA's easier pathways in parallelfile-2cw9tcjlojpxy6vu9chyzl. The launch plan should include a **regulatory roadmap**: e.g. target a **UKCA mark** (or CE mark for EU) by a certain date, perhaps after initial pilot data is gathered.

- **Basic Policies:** As you prepare to operate, draft basic terms and policies: a **Privacy Policy** and **Terms of Service** for any pilot usage of the platform (even if it's a closed beta). Clinicians and hospitals will want to know how you handle data privacy. Make it transparent that *Clerky* maintains patient confidentiality and outline measures taken (encryption, anonymization if applicable, etc.). Also prepare a **clinical safety policy** if required by NHS (often digital health tools need a Clinical Safety Officer overseeing risks – initially, as an NHS clinician yourself, you might fill this role informally). These documents can be simple at first, but having them shows professionalism when dealing with stakeholders.

Go-to-Market Strategy

Clerky's go-to-market will focus on **NHS clinicians as the primary users**, starting in maternity care (Obstetrics & Gynaecology) where the need and potential impact are high. The approach will be phased: initial pilot with a small group of clinicians to validate the solution, then broader adoption leveraging results and endorsements.

- **Target Customer Profile:** The immediate target users are **NHS doctors** (and potentially midwives or nurses) working in clinical settings with heavy documentation and guideline adherence demands – notably Obstetrics & Gynae, as per your specialty. The business case identifies O&G clinicians, with expansion to midwives, nurses, and HCAs as possible usersfile-2cw9tcjlojpxy6vu9chyzl. In the long run, *Clerky* can be applied to other specialties (e.g. emergency medicine, surgery) that face similar documentation burdens. However, concentrating on **maternity services**

first is strategic: Obstetrics has high medicolegal risks and significant documentation requirements, meaning *Clerky* can deliver clear value (saving time and reducing errors). The NHS is incurring **£1.6 billion/year in obstetric negligence costs**file-2cw9tcjlojpxy6vu9chyzl – a figure you can quote to potential NHS stakeholders to underscore the importance of consistency in guidelines and documentation. *Clerky*'s value proposition for clinicians is to *"focus more on patient care while reducing documentation burden and mitigating negligence risks"*file-2cw9tcjlojpxy6vu9chyzl. For NHS managers, the pitch is improved efficiency and reduced costly errors/omissions.

- **Initial Pilot Implementation:** Begin with a **pilot program** in a high-need, controlled environment. For example, aim to pilot *Clerky* in an **NHS maternity triage unit** (as suggested in your business casefile-2cw9tcjlojpxy6vu9chyzl). Maternity triage is an ideal setting: it's a critical workflow (deciding priority of pregnant patients), requires adherence to guidelines, and produces documentation that goes into records. By piloting here, you can show how *Clerky* transcribes interactions, prompts clinicians with real-time guidelines (e.g. NICE or RCOG guidelines for maternity), and generates structured notes. Identify a specific NHS **hospital or trust** willing to collaborate. Leverage your position as an NHS clinician: reach out to the maternity department in your own hospital or contacts you have in other trusts. **Clinical champions** are key – find a respected obstetrician or midwife lead who is enthusiastic about innovation to support the pilot internally. Offer the pilot at no cost, positioning it as a trial that could demonstrate efficiency gains and patient safety improvements. The pilot plan should outline duration (perhaps 3-6 months), the scope (# of users or shifts covered), and metrics to track (e.g. reduction in time spent on paperwork, number of guideline deviations caught by *Clerky*, user satisfaction feedback).

- **Stakeholder Engagement:** Prior to and during the pilot, engage broader stakeholders to build buy-in. Meet with the hospital's **Digital Transformation or Innovation lead**, and the **Clinical Governance** team, to ensure *Clerky* aligns with their needs and safety standards. Also involve the **IT department** early – *Clerky* will likely need access to their EHR (Electronic Health Record) system or at least a sandbox environment to demonstrate EHR note integration. Highlight *Clerky*'s ability to produce **EHR-compatible notes** and your plan for "seamless EHR integration" in the next development phasefile-2cw9tcjlojpxy6vu9chyzlfile-2cw9tcjlojpxy6vu9chyzl. On a regional level, connect with your local **AHSN (Academic Health Science Network)** or initiatives like **DigitalHealth.London** (if you're in London or a similar program in your region). These bodies help bridge startups and the NHS, often supporting pilot matchmaking and providing advice on NHS procurement. Another avenue is the **NHS Clinical Entrepreneur Programme** (if not already involved, consider applying) – it's specifically designed to help NHS staff like you develop innovations, providing mentorship and networking with NHS stakeholders.

- **Demonstrating Value:** Collect data and testimonials from the pilot. Aim to show quantifiable improvements: e.g., "*Clerky* saved clinicians an average of 30% of time on note-taking per consultation," or "100% of clinicians felt more confident they hadn't missed any guideline-recommended steps." Also capture any anecdotal success

stories (e.g. a case where *Clerky*'s prompt prevented an oversight). These will be gold when convincing other NHS departments or investors. Additionally, track the reduction in potential error rates or improved compliance with protocols. If possible, involve the hospital's **audit or research team** to independently evaluate the pilot outcomes – an endorsement or published case study adds credibility.

- **Iterate with Feedback:** Use pilot feedback to refine the product (your business case calls this *"Phase 1: Enhance prototype with user feedback"*file-2cw9tcjlojpxy6vu9chyzl). For example, clinicians might want a tweak in the UI or find certain guideline suggestions too intrusive – fine-tune these aspects. Early users might also suggest new features (maybe integration with a specific maternity risk score or printing a patient summary). Prioritize the changes that improve user experience and clinical relevance. This not only improves *Clerky* before broader rollout but also turns those clinicians into advocates as they see their input incorporated.

- **Business Model & Pricing (Initial):** For NHS, typically the model could be B2B – the hospital or trust pays for licenses or subscription. However, adoption in NHS can be slow, so consider a **freemium or tiered model** to get initial tractionfile-2cw9tcjlojpxy6vu9chyzl. For instance, *Clerky* could offer a **free basic version** to individual clinicians: they can sign up and use the transcription and note-generation for their own practice (with general guidelines) for free. Premium features (or institutional use) could then be monetized – e.g., a **paid tier for hospitals** that includes integration into EHR, customization to local guideline libraries, and admin dashboards. The business case suggests a *"tiered subscription model, including freemium options for initial use"*file-2cw9tcjlojpxy6vu9chyzl. This strategy allows you to build a user base and collect data even before big contracts. Clinicians who love the free tool can become internal champions who push their NHS trust to purchase the enterprise version for seamless workflow integration.

- **Regulatory & Safety Clearance for Market:** Before scaling beyond pilots, ensure you address any regulatory approvals. For instance, after a successful pilot, you might seek an **MHRA stamp or UKCA Class IIa certification** for the software. Also, conduct a **clinical risk assessment** (per NHS DCB0129 standard for clinical risk management of health IT, which is often required for health software in NHS). Having these in hand makes procurement much easier. If full regulatory approval is still in progress, you can potentially deploy under research or evaluation exemptions, but clear transparency about status is needed.

- **Expand to Other Sites:** After proving in one site, plan to expand pilots to others. Perhaps target a second hospital's maternity unit, ideally in a different NHS Trust to test *Clerky* in a new environment. Leverage any connections via professional networks (e.g., the Royal College of Obstetricians & Gynaecologists could be interested in innovative tools for their members). Present at relevant NHS forums or conferences: for example, submit to speak at the **Digital Health Rewired** conference or NHS Innovation events, focusing on how AI can improve front-line clinician workflows. Getting exposure in NHS circles will attract interested clinicians who might

volunteer their department for the next pilot.

- **Partnerships:** Consider partnerships that ease market entry. For example, working with an **EHR vendor** (like Cerner or Epic which are used in some NHS hospitals) to integrate *Clerky* as an add-on could be a route – though this might be longer-term due to big vendors' slow processes. Alternatively, partner with an existing **NHS digital service**; for instance, if there's a popular maternity app or digital documentation system, *Clerky* could integrate with it to add AI capabilities. Early partnership discussions can open doors and possibly funding (some EHR companies run startup programs).

- **International Strategy (optional):** While the UK NHS is the focus, keep an eye on other markets as mentioned in the business case. The **US market** could be attractive (large and faster-moving with private hospitals). You might pursue FDA's Software Pre-Cert program concurrentlyfile-2cw9tcjlojpxy6vu9chyzl, especially if you raise enough funds. Similarly, consider Australia or New Zealand where approval processes might be fasterfile-2cw9tcjlojpxy6vu9chyzl. A strategy could be: prove the concept in the NHS (as a prestigious use-case), then use that success to sign on a few international hospital customers or get into an accelerator in those regions. This diversification can also appeal to investors (global market potential).

In summary, **start with the NHS clinicians who need it most (maternity)** to get a strong case study. Use a **pilot -> iterate -> expand** approachfile-2cw9tcjlojpxy6vu9chyzl to gradually grow adoption. The NHS is a huge system, so showing alignment with its priorities (e.g. safer maternity care, efficiency, digitization goals) is critical. In fact, *Clerky* can be pitched as supporting the NHS Long Term Plan's goals of digital transformation and patient safety – your business case summary states it is *"aligned with NHS priorities… poised to deliver significant benefits"*file-2cw9tcjlojpxy6vu9chyzl. This narrative will be used in both marketing to the NHS and pitching to investors.

Funding and Investor Outreach

To turn *Clerky* from a prototype into a fully developed platform, you plan to seek **external funding**. A combined approach of pursuing **non-dilutive grants** and **angel/VC investment** will be wise, especially in the healthtech domain where grant support is strong in the UK. Below is a strategy to identify funding sources and approach investors:

- **Grant Programs:** Start with grants to bolster your R&D without immediately giving up equity. In the UK, several grant programs target healthcare innovation:

    - **NHS AI in Health and Care Award:** This government-backed program (through NHSX/NHS AI Lab and NIHR) provides staged funding for AI healthcare solutions. For example, Phase 1 awards ~£100k-£150k for feasibility, Phase 2 larger amounts for development, etc.england.nhs.uk. Many digital health startups (including those focusing on clinical AI) have won these awards. Winning such an award would not only fund development but

also provide credibility and NHS validation. Keep an eye on the application calls (usually annually); tailor your application to how *Clerky* meets NHS priorities (e.g. reducing documentation burden, improving patient safety).

    - **SBRI Healthcare (Accelerated Access Collaborative):** SBRI runs themed competitions for healthcare challenges. For instance, they recently awarded **£2.5m across five maternity care innovations** (average ~£500k each) to improve outcomessbrihealthcare.co.uk. If a competition call aligns (e.g. "Improving Clinician Efficiency" or "Patient Safety through AI"), *Clerky* would be a strong contender. SBRI Phase 1 awards are often ~£100k for 6-month projects, with potential Phase 2 follow-on fundingsbrihealthcare.co.uk. Keep track of SBRI competitions (they announce specific themes such as maternity, primary care, etc.).

    - **Innovate UK Smart Grants:** Innovate UK (part of UKRI) regularly offers Smart Grants for any innovative technology. These can provide £100k–£500k for R&D projects. A proposal highlighting *Clerky*'s technical innovation (AI NLP engine for real-time support) and commercial potential could score well. Success may depend on demonstrating a strong team and feasibility; having a working prototype and pilot plans will help.

    - **NIHR i4i (Invention for Innovation):** NIHR offers grants for medical technology development. The i4i program has funding streams for early-stage and late-stage innovations. As *Clerky* involves patient care, NIHR funding (which often requires an NHS partner on the application) could be accessible, especially if you involve your hospital as a partner in the research aspect of *Clerky*'s development (like evaluating clinical outcomes).

    - **Other Grants/Competitions:** Look out for regional funds (some Local Enterprise Partnerships have innovation grants), the Small Business Research Initiative (**SBRI** as above), or even UK Research Council grants if you partner with an academic institution (for example, an AI research grant in collaboration with a university computing department). Also, the **Accelerated Access Collaborative** and **NHS Innovation Accelerator (NIA)** – the NIA itself doesn't give funding but provides support and high-profile endorsement for scaling in the NHS. Getting onto programs like NIA or DigitalHealth.London Accelerator can indirectly lead to funding opportunities and investor attention.

- **Angel Investors:** On the private investment side, start with **angel investors** who are familiar with healthtech. Angel investors in this space might be clinicians with entrepreneurial experience (e.g. members of MedTech investor networks), or general tech angels intrigued by AI in healthcare. You and your wife's personal network as NHS professionals could turn up doctors interested in investing (for example, consultants who often invest in promising medtech). Additionally, consider approaching angel networks like **Cambridge Angels** or **Oxford Angels**, which often invest in health startupsshizune.co. There are also specialized angel groups for healthcare – e.g., **Angels in MedCity** in London or health-focused syndicates on

platforms like SyndicateRoomshizune.co. When pitching to angels, emphasize the real-world clinical problem you are solving (burnout and negligence risk from documentation overload) and your domain expertise as a practicing doctor (this gives you credibility that many tech founders lack). Also highlight early traction (the working prototype, any pilot commitments) and the large NHS market potential. Remember to mention the SEIS/EIS benefits – many UK angels *seek* SEIS-qualifying startups to invest in for the 50% tax breakukbaa.org.uk. Since *Clerky* is new, it should qualify for **SEIS** (companies <2 years old, <£200k raised, etc.), so ensure you've obtained **Advance Assurance** from HMRC for SEIS/EIS before approaching angel networksseedlegals.com. This assurance signals to investors that their investment *"is likely to qualify for tax relief"*seedlegals.com, making them more inclined to commit funds.

- **Venture Capital (VC) Funds:** Research and target **early-stage VC funds** that invest in healthtech or AI. In the UK, some notable VC funds and accelerators for seed-stage healthtech include:
    - **AlbionVC** – has a track record in digital health (e.g. they've backed AI health companies)shizune.co.
    - **Episode1 Ventures** – a tech seed fund that has shown interest in AI and could consider health AI.
    - **Oxbridge university funds** like Oxford Science Enterprises or Cambridge Innovation Capital – they often invest in healthtech (though usually those linked to university IP)shizune.co. However, **Cambridge Angels** or **Oxford's funds** could be relevant given the health focusshizune.coshizune.co.
    - **Crista Galli Ventures** – a VC dedicated to early-stage healthtech (founded by a radiologist, they specifically aim at European health startups).
    - **Seedcamp** – a prominent seed fund that occasionally does healthtech deals (and as a seed fund, they have broad interest including AI).
    - **LocalGlobe** – another early-stage fund known in the UK that has invested in healthcare startups.
    - **Episode 1, Kindred, Connect Ventures** – generalist seed funds that have AI and some health in their portfolio.
    - **KQ Labs (Francis Crick Institute's accelerator)** – offers a small funding and a program for AI in healthcare startups, which could be a way to get VC introductions.
    - **International funds**: Don't ignore EU or US seed funds with healthtech focus (e.g. **Nina Capital** in Spain focuses on healthtech, or **Heal Capital** in Germany). Many US investors also eye UK AI-health startups after some

initial traction.

- When targeting VCs, craft a compelling **pitch deck**. Emphasize: the size of the problem (NHS and global clinician burnout, negligence costs), *Clerky*'s unique solution (*"no current solution offers Clerky's integrated real-time guidance and documentation"* – first-mover advantagefile-2cw9tcjlojpxy6vu9chyzl), evidence of demand (feedback from clinicians, pilot plans), and the strength of the founding team (domain expertise + a working prototype built while working full-time shows dedication and skill). Include your roadmap that leads to significant revenue (VCs will want to see the potential to scale beyond the NHS to a global health IT market worth billions, even if initial focus is NHS). Also address **regulatory strategy** upfront, turning a potential concern into a strength (e.g., "We recognize this will be a regulated device – our plan to achieve approval by doing X, Y, Z and thus we will have a high barrier to entry for competitors").

  Prepare to discuss competition: e.g., how you differ from **Nuance (Microsoft)** and others – the business case notes that Nuance does transcription but lacks real-time decision supportfile-2cw9tcjlojpxy6vu9chyzl, and **Medwise.ai** is just a search enginefile-2cw9tcjlojpxy6vu9chyzl. Use such points to show *Clerky*'s edge. VCs will also ask about exit potential – possible acquirers could be big tech in healthcare (Microsoft, Google) or EHR companies, or even medical device firms expanding into software.

- **Pitching & Networking:** Begin networking well before you need the funds. Attend healthtech meetups (e.g. Healthcare Hub events, HealthTech Investor Forum if available). Use LinkedIn to connect with partners at the funds mentioned, especially those who have a track record in health investments – for instance, partners at **Octopus Ventures** healthtech team (Octopus is very active in UK health investments and often leads seed/Series Asifted.eu), or **Episode1** etc. Prepare a concise elevator pitch highlighting the mission ("Clerky uses AI to let doctors be doctors again, by handling their paperwork and guiding best practices in real time, potentially saving the NHS millions and improving patient care"). Leverage any accelerator programs: consider applying to **Entrepreneur First (EF)** in London – though you already have a team, EF sometimes takes single founders; or other programs like **AWRC Wellbeing Accelerator** (if relevant), etc., which often come with a bit of funding and investor demo days.

- **Timeline for Fundraising:** Align your fundraising timeline with product milestones. A logical plan could be: secure some grant or angel funding *soon* (next 3-6 months) to hire a couple of developers and build out the product for pilot, then after demonstrating pilot success (~6-9 months from now), raise a larger **seed round** from VCs to scale. Many successful healthtech startups do a pre-seed from angels (say £150k SEIS) to get to a pilot, then seed from institutional investors (£1-2M) to expand. Ensure you target the **SEIS window** (you can only raise up to £250k under SEIS, which is extremely attractive to investors) – try to utilize that for your angel/pre-seed round. For the seed VC round (which could be late 2025 or 2026), having pilot data and possibly an NHS contract or at least an MOU for rollout will

greatly strengthen your pitch.

- **Use of Funds:** Be clear in your plan for using investor funds – e.g., "This £500k will allow us to achieve: integrate with 2 major EHR systems, comply with MHRA Class IIa requirements, and run 3 hospital pilots, leading to 5 paid contracts in 18 months." Investors will want to see that their capital fuels growth (team hires, product dev, and sales/BD to sign on NHS customers or private hospitals) and not wasted. Given your mention of leveraging AI agents to remain lean, highlight that you plan to keep the team efficient and use technology (like AI automation) to punch above your weight – meaning their investment can go further than in a typical startup.

- **Early Revenue Strategy:** Even while seeking funding, think about small-scale revenue opportunities that validate the willingness to pay. For example, perhaps a private **fertility clinic** or **urgent care center** could pay a pilot fee for *Clerky*. Any such paying pilot, even a modest amount, is proof that the product has market value. Alternatively, if direct NHS contracts are slow, consider offering *Clerky* to **GP practices** or specialist clinics on a subscription basis (GPs are under similar documentation pressure). If one or two clinics sign up for a monthly fee, it provides a revenue story to tell investors ("We have paying users and a pipeline of X more").

- **Keep Investors Updated:** Once you start engaging, even if someone isn't ready to invest immediately, put them on an email update list. Send brief updates every quarter on your progress (new pilot started, product version released, key hire made, etc.). This keeps potential investors warm and shows execution. By the time you formally pitch for seed round, they've already seen you hitting milestones.

In summary, **combine grants and equity funding** to de-risk the venture. UK grants can effectively subsidize your R&D (non-dilutive), and the **SEIS/EIS schemes** plus strong healthtech investor community will help in raising equity. Identify health-focused investors (like those *"making the biggest impact on healthtech"* in the UKstartupmag.co.ukstartupmag.co.uk) and tailor your pitch to them. By showcasing clinical impact, a credible prototype, and a scalable plan, you'll maximize your chances of funding success.

Marketing Strategy (Low-Cost & AI-Powered)

With a tight budget and small team, your marketing must be **cost-effective, targeted, and leverage automation/AI** wherever possible. The initial target market (NHS clinicians and stakeholders) requires a professional, trust-building approach – content that demonstrates thought leadership and addresses their pain points. At the same time, you can use modern digital marketing hacks and AI tools to amplify your reach without big spend.

- **Branding and Online Presence:** Ensure *Clerky* has a simple, informative **website**. Even if it's just a landing page to start, clearly communicate what *Clerky* is and the value proposition (e.g. "AI Assistant for Clinical Consultations – saving doctors time and improving patient safety"). Include a way for interested users or partners to **sign**

up for updates or request a demo. You can build a professional-looking site on a low budget using tools like Webflow or WordPress templates. If design isn't your forte, use **Canva** (free tier) to create a clean logo and some graphics (Canva has templates for tech logos and social media banners). A consistent visual identity (colors, font, logo) will make your materials look polished.

- **Content Marketing:** Establish *Clerky* as an expert voice in the intersection of AI and clinical practice. Start a **blog** on your site or publish articles on **LinkedIn**. Possible topics: "The Burden of Clinical Documentation – Can AI Help?", "How Real-Time Decision Support Prevents Medical Errors", "A Day in the Life of a Doctor with an AI Scribe". These topics educate your audience (clinicians and health IT managers) and naturally introduce the need for *Clerky*. **AI writing assistants** can help generate drafts for these articles – for example, using ChatGPT or Jasper to get a first draft, then editing it with your medical expertise for accuracy and tone. This saves time and ensures you regularly put out content without hiring a content writer. Over time, these posts improve SEO so that people searching for solutions to clinical documentation or guideline compliance find you.

- **Social Media (Organic):** Focus on **LinkedIn** and **Twitter (X)** for reaching professionals. On LinkedIn, connect with NHS digital leaders, clinicians, and healthtech enthusiasts. Share your blog articles, short insights (e.g. commentary on a new NHS digital initiative, or a statistic about clinician burnout with a note on how AI can help). LinkedIn's algorithm favors regular posting and personal profiles, so perhaps you as founder can post from your personal account, building your personal brand as an NHS doctor-entrepreneur. On Twitter, engage with the digital health community – follow and interact with hashtags like #HealthTech, #NHS, #MedTwitter. Post updates like "Excited to demo our AI clinical assistant at [Hospital Name] maternity unit – doctors spent 40% less time on notes last week! #AI #NHS". Such posts, if seen by the right people, can spark interest. Use **AI tools to assist**: for example, **Buffer** or **Hootsuite** (with free plans) can schedule your posts in advance. You could even use an AI like ChatGPT to suggest variations of a post to test which sounds best.

- **AI-Generated Marketing Content:** Embrace AI to produce marketing collateral quickly. For instance:

    - Use **Generative AI for images** when needed (tools like DALL-E or Midjourney) to create illustrative images for blog posts (e.g. a doctor interacting with a futuristic AI assistant). Many of these tools have free or cheap options for a limited number of images.

    - Use AI copywriting tools (Copy.ai, Jasper) to generate catchy taglines, social media captions, or even Google ad copy (for later when you might run ads). For example, these tools can generate multiple versions of a slogan like "Spend more time with patients, let AI handle the paperwork" – you can refine the best one.

    - **Email marketing**: If you start a newsletter to update interested clinicians, AI can help draft the content. Tools like HubSpot's content assistant or simple use of ChatGPT can turn bullet points of your updates into a nicely worded email.

- **Low-Budget Outreach:** Direct outreach can be effective in healthcare, where personal touch matters. Compile a list of contacts (or ask for introductions) to heads of departments, clinicians involved in NHS innovation, or managers at target hospitals. Send **personalized emails** introducing *Clerky*. Here, AI can also assist: you can use GPT to draft initial email templates and then personalize each with a sentence about that hospital or person. Keep the tone professional and focused on solving their problem (e.g. "I'm a fellow NHS clinician who got tired of spending evenings on paperwork – so I built an AI tool that drafts notes and ensures guidelines are followed. Would [Hospital Name] be interested in a free pilot to see the benefits?…"). Since you and your wife are doing this part-time, automate follow-ups with tools like **Mailshake** or even Gmail's schedule send, but ensure each email feels individual.

- **PR and Media:** Getting a bit of media coverage can greatly boost credibility. Identify journalists or bloggers who cover NHS tech or healthcare innovation (e.g. writers at ***Sifted***, ***Digital Health News***, or **Med-Tech Innovation**). Send them a concise pitch about *Clerky* – focus on the human interest angle ("NHS doctor develops AI assistant to cut doctors' admin workload, inspired by his own frustrations on the wards"). Since clinician burnout and AI are hot topics, you might get interest. Also, leverage any big events: for example, if you apply for an award or competition (like HSJ Awards or AXA Health Tech awards), a shortlisting or win can be PR fodder. **Local news** might also be interested (e.g. "Brighton doctor launches AI platform for hospitals" could feature in local press, which you can then share on social media).

- **Conferences and Webinars:** With minimal budget, you can still increase visibility by speaking at events. Many conferences offer **startup showcase slots** or discounts. Look at events like **NHS Innovation Expo**, **CogX (for AI)**, or specialty conferences (RCOG conference) – perhaps you can present a poster or a talk about *Clerky*'s pilot results. If travel or costs are an issue, consider hosting a **webinar** yourself. For example, a webinar on "How AI can streamline clinical consultations – lessons from the front line" where you demo *Clerky*. Promote it through LinkedIn and perhaps relevant forums (like the Future NHS collaboration platform, if you have access). Use free tools like Zoom (up to 100 participants free) or YouTube Live. Webinars help gather interested folks; you can then follow up with them individually.

- **Community Engagement:** Engage in communities where clinicians or healthtech people gather online. For instance, the **r/medicine** or **r/healthIT** subreddits on Reddit might be places to softly discuss the idea (without being too promotional initially). Or join the **NHS Digital Academy Alumni** or similar LinkedIn groups. When appropriate, mention *Clerky* and what it does. The goal is to become known in the community so that when you fully launch, people have heard of it. You could also answer questions on forums (Stack Exchange, Reddit) about medical documentation or mention your project in relevant discussions, positioning it as "something I'm

working on that might help".

- **Marketing with Data**: As you collect data from pilots or early users, turn that into marketing material. For example, publish an infographic "One month with *Clerky* in [Hospital]: 120 hours of doctor time saved, 15% increase in guideline compliance." Visual content like infographics can be made easily on Canva. Share these on social media and your site. Data-driven stories are persuasive to both clinicians and administrators.

- **Leverage AI for Marketing Analytics:** As you increase marketing activities, use tools (some with AI) to analyze what's working. For example, use **Google Analytics** on your website to see how many visitors your content draws and from where. Many modern analytics platforms have AI insights that automatically highlight unusual traffic spikes or user behavior. For social media, tools like **Shield AI for LinkedIn** can give advanced metrics (paid, but maybe unnecessary early on). If you send emails, track open and click rates (Mailchimp's free tier can manage a few hundred contacts and provides such analytics). AI can also help in A/B testing your messaging – e.g., you might run two versions of a LinkedIn ad copy (if you experiment with small-budget ads later) and the platforms often use machine learning to optimize which one shows more. Even without ads, you can manually observe engagement and ask an AI tool like ChatGPT to suggest why one post might have performed better than another, to refine your strategy.

- **Building Trust:** In healthcare, credibility is key. Use your content and social proof to build trust. For instance, publish a couple of **testimonial quotes** from clinicians who try *Clerky*: *"As an Ob/Gyn, Clerky felt like having a personal assistant taking notes and double-checking guidance. It freed me to focus on my patient."* (You can initially simulate such testimonials from friendly colleagues who try the prototype). When you have pilot results, ask the department head or a senior consultant for a short endorsement. Display these on the website and marketing materials. Trust can also be built by association: highlight any grants you win, any affiliations (e.g. "Supported by [Local AHSN]" or "Member of DigitalHealth.London Accelerator 2025 Cohort" if it happens). These signals reduce perceived risk for others considering your product.

- **Budget Considerations:** The above strategies require time more than money. Allocate a small budget for essential items: perhaps a few hundred pounds for website hosting and domain, design software subscriptions, and a one-off cost for logo design if needed. You might allocate a tiny experimental ad budget (even £50 on LinkedIn or Google Ads targeted at NHS managers) to see if that generates any leads, but be cautious – direct advertising to NHS is often less effective than relationship-based marketing. One high-ROI area could be **targeted LinkedIn ads** to job titles like "Chief Medical Information Officer" or "Digital Programme Lead" in NHS trusts, showcasing a case study and inviting them to a demo. You can set a very tight budget and duration for such an experiment to gauge interest.

- **AI "Marketing Bots":** The concept of **agentic AI** can extend to marketing as well. You could deploy a chatbot on your website to engage visitors – e.g., an AI-driven chat widget that can answer basic questions about *Clerky*. Tools like **Drift** or

Intercom offer chatbots, or you could integrate an open-source GPT-based chatbot fine-tuned on your FAQ. This gives a responsive feel to site visitors without you manning it live. Also consider using an AI-driven tool like **Albert.ai** for digital ads if in future you run larger campaigns – platforms like Albert *"autonomously manage and optimize digital advertising campaigns"* across Google/Facebookzoomd.com, which could save you from hiring a marketing agency. For now, keep note of these advanced options as you scale the marketing efforts.

Overall, focus your marketing on **educating the market and building credibility**, rather than overt selling. By sharing valuable content and using AI to amplify your productivity, you can punch above your weight in marketing. Each piece of content or social outreach should subtly reinforce *Clerky*'s message: that you understand the pain of clinicians and have a novel solution. This way, when you approach hospitals or investors, they might already recognize *Clerky* or have seen your insights online, warming them up to your vision.

Leveraging Agentic AI for Development & Operations

One of your goals is to **use agentic AI (autonomous AI agents) to accelerate development and operations**. This is a smart strategy to keep your startup lean while moving fast. By harnessing tools like Auto-GPT and others, you can automate tasks in coding, testing, marketing, customer support, and more. Below is how you can apply AI in various aspects of *Clerky*'s growth:

- **Product Development Acceleration:** Writing code and developing complex AI features can be sped up with AI assistance. For example, use **GitHub Copilot** or **OpenAI's Codex** while coding – these tools autocomplete code and can generate boilerplate functions, saving time. For larger tasks, experiment with **Auto-GPT** (an autonomous AI agent that can iteratively work towards a goal you set). You can assign Auto-GPT a task like "Improve the prototype's UI for better usability" or "Find optimization opportunities in the speech-to-text pipeline". It will generate ideas, attempt code, and even debug within limitsneilpatel.comneilpatel.com. Keep expectations realistic – as an "AI intern," it might produce usable snippets or suggestions which you then refine. For instance, you could have it draft a piece of code to integrate a certain API, or generate test cases for your code. According to a guide by Neil Patel, *"you can give Auto-GPT a project…and it takes the necessary steps to finish the task"*neilpatel.com, even breaking it into subtasks autonomously. Concretely, you might instruct: "Auto-GPT, as a Python developer agent, improve the accuracy of our medical text summarization module." It could then fetch medical text processing info, suggest code changes, and attempt to implement them. Always review and test AI-produced code – it can speed you up, but it's not foolproof. Also consider using other agent frameworks like **BabyAGI** or **LangChain** agents for specific tasks (LangChain can help create an agent that, say, reads a medical guideline and tests if *Clerky*'s output aligns with it).

- **Technical Research and Problem-Solving:** When you hit a technical challenge (e.g. determining the best way to ensure data privacy or figuring out how to meet a

specific NHS interoperability standard), unleash an AI agent to research. Instead of manually scouring documents, an agentic AI could be instructed to "find UK NHS FHIR API specifications and summarize integration steps". It can crawl the web (or your provided documents) and give you a distilled answer with references much faster. Reddit users have reported using Auto-GPT for *"automating research tasks"*, finding it *"super helpful for streamlining repetitive work."*reddit.com This means while you're busy with, say, a meeting, an AI agent could be compiling a report on "all Class IIa medical device requirements relevant to Clerky" or comparing various speech-to-text libraries performance.

- **Documentation and Knowledge Base:** Keeping documentation up-to-date is often tedious. Use AI to help write **developer docs, user manuals, and compliance documentation**. For example, after coding a new feature, you can prompt an AI: "Explain in simple terms how the new feature X works and how to use it." This can produce a draft user guide section. You can also maintain an internal knowledge base (like Notion or Confluence pages) and have an AI agent periodically summarize recent changes from your commit logs or meeting notes into that knowledge base. This ensures that if you bring on new team members or contractors, they can get up to speed quickly by reading AI-curated documentation. Additionally, consider using **Auto-GPT to generate documentation**: one of its use cases is *"report generation"* and it can break down tasks like documenting an API into sub-tasks and execute themmedium.com.

- **Customer Support (Automated):** As you start having users (clinicians using *Clerky* in pilots or later, potentially on a wider scale), provide support without needing a 24/7 team by using AI chatbots. You can fine-tune a language model on an FAQ about *Clerky* and deploy it on your site or within the app to answer questions like "How do I edit a note the AI drafted?" or "Is patient data secure?". Tools like **Dialogflow** or **IBM Watson Assistant** can create a chatbot that handles common queries. There are also newer solutions like **Intercom's Fin AI** or **Zendesk Answer Bot** that plug into your support system and automatically draft answers from your knowledge base. Ensure the AI's answers are accurate (test it thoroughly and update the training data frequently). This way, if a clinician user asks a question at 10pm, the bot can respond instantly. If it cannot handle an issue, it can collect the info and assure them of a follow-up, which you or your team handle the next day. Over time, as you log more support questions, train the AI better on those answers. Neil Patel notes that Auto-GPT can *"manage customer support responses"* autonomouslyneilpatel.com – this implies you could have an agent monitor incoming support emails or chats and draft replies for you to approve. As volume grows, that draft-and-approve flow could save a lot of time.

- **Marketing & Sales Automation:** We touched on AI in marketing content; here let's consider an **AI marketing agent**. For example, use **Auto-GPT for marketing tasks** like: "research the top 50 NHS trust contacts for digital innovation and provide a spreadsheet" – an agent might crawl public NHS directories to find names/emails of CCIOs or innovation leads. Another task: "draft a personalized LinkedIn message for each of these 50 contacts highlighting how Clerky addresses their trust's needs." The AI could iterate over a list and produce tailored blurbs (though you'd still check them).

In essence, you can chain tasks: research + create outreach content + even schedule it (some auto-agents could interface with email or LinkedIn via APIs if set up securely). There are also AI services like **Reply.io** or **Apollo.ai** that help automate sales outreach with AI-crafted emails. Just be cautious to keep messages human-like and avoid spammy feel.

- **Internal Operations and Planning:** Use AI as a **virtual operations assistant**. Administrative tasks like preparing meeting agendas or summarizing meeting notes can be offloaded. For instance, record your team meetings (even if it's just you and your wife planning) and use an AI service (like Otter.ai or Zoom's built-in AI) to transcribe and summarize action items. If you need to create a project plan or timeline (like parts of this document), you can ask ChatGPT or an Auto-GPT agent to draft a project plan given certain milestones – it will outline tasks which you can then adjust. For HR things like drafting contractor agreements or workplace policies, you can feed an AI a template and ask it to customize or check consistency. Basically, treat AI as a junior admin employee: scheduling, drafting routine communications, creating Excel reports (you can even ask AI to analyze small datasets or make charts). Some entrepreneurs use AI assistants for email management: tools that prioritize your inbox or draft responses based on your past writing style.

- **Auto-GPT and Agents – Practical Caution:** The promise of Auto-GPT is huge – *"a cutting-edge AI tool that can revolutionize day-to-day tasks by automating them"*neilpatel.com. For example, you could tell Auto-GPT: "You are an agent helping improve my startup's online presence. Goal: increase website traffic by 50% in 3 months. Steps: perform SEO audit, create content plan, execute it." It might then perform a series of actions like analyzing your site, searching for keywords, suggesting content topics and even writing some content. However, in practice, these agents are still early-stage. They sometimes get stuck or produce errors (as Neil Patel notes, *"Auto-GPT isn't perfect… sometimes generates inaccurate responses"*neilpatel.com and can incur cost if running many queriesneilpatel.com). So use them with supervision – treat it as a collaborator that still needs oversight. Start with small experiments: one specific task at a time, and watch the outputs. Over time, you'll learn how to prompt these agents effectively (prompt engineering) to get better results. Also, always guard sensitive data – do not accidentally feed actual patient data or proprietary code into external AI services without ensuring privacy (if needed, self-hosted models might be an option for sensitive tasks).

- **Recommended Platforms and Tools:** To summarize some tools to incorporate:

    - **Auto-GPT** – an open-source agent that uses GPT-4 to self-prompt and complete goalsneilpatel.comneilpatel.com. Good for multi-step tasks like research, coding, marketing content creation.

    - **BabyAGI** – a smaller-scale autonomous agent that creates and executes tasks towards a goal. Good for task list generation and sequential execution in a controlled way.

    - **LangChain Agents** – a Python framework to build custom agents that can use your data and tools (e.g., an agent that reads your GitHub issues and automatically tries to fix bugs).

    - **Github Copilot** – integrates into VS Code/IDE for on-the-fly code suggestions.

    - **ChatGPT / GPT-4** – for on-demand Q&A, brainstorming, writing drafts (accessible and versatile).

    - **Zapier or Make (Integromat) with AI** – these automation platforms now integrate OpenAI, so you can set up triggers. For instance, “when a new support email comes in, use OpenAI to draft a reply, then send to a folder for review.” This glues AI into your workflows without coding from scratch.

    - **Marketing AI tools**: as mentioned, tools like **Albert.ai** for ads, or **Copysmith** for generating lots of product descriptions, etc., could be part of your stack when needed. Even design tools like Adobe now have AI features (Photoshop’s generative fill could help create marketing images easily).

    - **Customer service AI**: e.g., **Ada Support** or **Forethought AI** – platforms that layer AI on customer service; or simply use OpenAI’s API to build a custom bot.

- **Continuous Learning:** The AI landscape evolves rapidly. Dedicate time each month to scan for new AI tools that could benefit you. For example, recently Auto-GPT might get improved or new specialized agents may appear for coding or design. Being an early adopter of these can give you an edge (and fits *Clerky*’s innovative ethos). Join communities like the AutoGPT Discord or follow AI blogs to see how others are applying agents. Often, entrepreneurs share automation recipes which you can adopt.

By integrating these AI and agentic approaches, you essentially augment your one/two-person team with a squad of digital assistants. This will allow you to accomplish tasks in parallel that normally would require a larger team – whether it's writing code, conducting research, or engaging users. It aligns with your vision of leveraging cutting-edge AI not just in your product but in how you build the company. As long as you validate the outputs, this strategy will speed up development, reduce costs, and let you focus human effort on the highest-level decisions and creative aspects that truly need your expertise.

Timeline and Milestones

Below is a high-level timeline outlining the key phases and milestones for launching *Clerky*. This assumes you continue working part-time initially, with ramp-up after securing funding. The timeline is itemized in phases with target outcomes:

- **Months 0-2: Foundation Setup**
    - *Incorporation & Admin:* Register the company (Complete by Month 1). Set up the business bank account and essential tools (accounting software, website domain) in the first few weeks.
    - *Legal Basics:* Finalize the founders' agreement between you and your wife. Draft standard NDA and contractor templates.
    - *Prototype Enhancement:* In parallel, spend these weeks improving the prototype's core functionality with any "quick wins." Incorporate initial feedback from friendly colleagues who try it. For example, ensure the speech recognition and note generation are working reliably for a demo scenario.
    - *Initial Outreach:* Quietly start conversations with potential pilot sites. By end of Month 2, aim to have at least a verbal interest from an NHS department (e.g. your own hospital's O&G department) to pilot *Clerky* once it's ready.
    - *Grant Applications:* Identify relevant grant opportunities (AI Award, SBRI etc.) and mark their deadlines. Begin drafting at least one grant application if the timing aligns (some calls might be quarterly or annual). For instance, if an SBRI competition is due Month 3, you should start the application now.
- **Months 3-5: MVP Build and Pilot Prep**
    - *Team Augmentation:* If an angel/SEIS round is in progress, close a small pre-seed funding (perhaps from savings or an angel) by Month 3 to allow hiring a freelance developer or AI engineer. Onboard them with contractor agreements (or if no hires yet, dedicate your evenings to coding sprints).
    - *Minimum Viable Product (MVP):* Develop *Clerky* to a pilot-ready state. This means it's usable end-to-end by a clinician: real-time transcription, guideline lookup and prompt, note generation, and a simple user interface. By Month 4, target an **enhanced prototype (MVP)** that you can start testing in a live environmentfile-2cw9tcjlojpxy6vu9chyzl. Also, ensure basic security (data encryption, user login) is in place for pilot.
    - *Internal Testing:* Conduct a small **alpha test** with 2-3 clinician colleagues (perhaps in a non-live setting: have them use *Clerky* on some mock patient cases or parallel to real consults, not as official record yet). Gather their feedback systematically.
    - *Pilot Logistics:* With pilot site confirmed, work on paperwork needed: Data processing agreements with the hospital, ethics approval if needed (or confirmation that as a service trial it's okay), and integration setup (e.g. VPN access or dummy EHR environment). Aim to have all approvals and IT setup ready by end of Month 5.

    - *Grant/Accelerator Outcomes:* Around this time, you might hear back from any quick-turn grant applications. Hopefully, secure at least one small grant (e.g. £50k from an innovation fund) – if so, factor this into hiring plans. If you applied to an accelerator (like DigitalHealth.London), you might get acceptance around Month 4-5 if the cycle fits.

- **Month 6: Pilot Launch**

    - *Go-Live:* Begin the **pilot in the NHS maternity triage (or chosen unit)**. For the first couple of weeks, have a very hands-on approach: one of you should be present or readily available to support the clinicians using *Clerky*. This is effectively a beta in production.

    - *Monitoring & Support:* Set up daily or weekly check-ins with pilot users to gather feedback and issues. Use your AI support chatbot on the side to capture any real-time questions they have. Ensure any critical bugs or needed tweaks are addressed rapidly (same-day fixes if possible) to keep users engaged.

    - *Data Collection:* Start collecting qualitative and quantitative data from the pilot. By end of Month 6, aim to have initial stats (even if small sample) like “X number of consultations processed by *Clerky*, Y hours saved”. Also track any errors or near-misses averted.

    - *Visibility:* Publicize the pilot kickoff in a modest way – maybe a LinkedIn post or a local news blurb. This sets the stage that *Clerky* is moving to real-world testing.

- **Months 7-9: Iterate and Validate**

    - *Pilot Ongoing:* Continue the pilot for a total of ~3 months (typical Phase 1 pilot duration). Throughout, iterate on *Clerky*: release improvements or new versions perhaps every 2-4 weeks based on feedback (agile approach). This might correspond to Phase 1 and 2 in your strategy (enhancing prototype, then developing needed infrastructure as you go)file-2cw9tcjlojpxy6vu9chyzl. For example, by Month 8 you might implement an EHR export function that pilot users requested.

    - *Analysis:* By Month 9, analyze the pilot results in depth. Compile a pilot report with outcomes, user testimonials, and case studies (this will be useful for both internal learning and external pitching). Ideally, have concrete evidence of *Clerky*’s benefits by the end of this phase.

    - *Regulatory Steps:* If not already, around Month 7 start the process of regulatory compliance (engage a consultant or begin documentation for UKCA marking). Also, if planning to raise a seed round soon, consider initiating **SEIS/EIS advance assurance** now (if not done) so it’s ready to

show investors.

    - *Community Building:* At this stage, consider creating a small **advisory board** or at least a network of supporter clinicians. Perhaps a couple of pilot users or your mentors can formally agree to be advisors – this adds credibility and they can help champion *Clerky* elsewhere.

- **Month 10: Funding Round Prep**

    - *Investor Outreach:* Using the pilot success as a springboard, start the heavy investor outreach by Month 10. Refine your pitch deck to include pilot data and a compelling story. Begin scheduling meetings with the angel networks and VCs identified. Aim to secure term sheets or at least strong interest by end of Month 11.

    - *Grants & Awards:* Also by Month 10, you should know outcomes of bigger grants (if you applied to the AI Award or SBRI, etc.). If you win any, incorporate that – if not, plan for the next cycle or alternate funding accordingly. Possibly apply for the next stage of any grants if pilot evidence qualifies you.

    - *Expansion Planning:* Identify the next target sites or markets. For example, have conversations with 1-2 other NHS trusts about starting a pilot in their departments (perhaps emergency medicine in one trust, or the maternity unit of another region to replicate results). These conversations, even if tentative, are good to mention to investors ("We have pipeline opportunities with Trust A and B pending results"). Also line up a plan for a **fee-based trial** or early adopter sale – e.g., a private hospital or an NHS site ready to move from pilot to paid usage (maybe starting Month 12 or next year). Having even a small revenue contract in pipeline by this time is a huge validation.

- **Month 12: Seed Funding and Team Growth**

    - *Secure Seed Investment:* By Month 12 (one year in), aim to **close a seed round** (could be £500k to £1.5M depending on ambition and investor appetite). This assumes your outreach in prior months went well. The funding will allow you to **go full-time** on *Clerky* (you and your wife) and hire a core team (developers, maybe a machine learning specialist, and a business development person). If the raise is still ongoing, try to at least secure bridge funding to keep momentum.

    - *Regulatory Submission:* Initiate or submit your **medical device approval application** around this time if aiming for UKCA or an FDA 510(k) (depending on strategy). Class IIa software might take a few months for approval, so starting by Month 12 means you could have a certified product by Month 18 or so. If you got an "Innovation Passport" or sandbox from MHRA due to being novel AI, leverage that to expedite.

    - *Marketing Push:* With new funding, month 12 is also when you can ramp up marketing. Perhaps attend a major conference with a booth, revamp the website, and issue a press release about the funding and pilot success. This will set the stage for broader market launch.

- **Months 13-18: Scale and Launch**

    - *Team Assembly:* Hire 3-5 key team members in development and operations by early in this period. Get them up to speed using the AI-curated documentation and mentor them in the company culture (innovation + efficiency via AI).

    - *Product V2:* Build out the robust, scalable version of *Clerky* with the new team (addressing any architecture improvements, adding features like multi-specialty support). Aim for a **Version 2 launch around Month 18** that is market-ready for multiple deployments (this aligns with *"Phase 3: Launch a fully operational platform with pilot sites"* in your business casefile-2cw9tcjlojpxy6vu9chyzl). Essentially, move from pilot prototype to a polished platform.

    - *Multi-site Deployments:* Turn the initial pilot site into a paying customer if possible (convert the pilot into a contract). Simultaneously deploy *Clerky* in at least 2-3 new sites (some could be paid, some might be part of a grant-funded trial). These are your **early adopters**. Provide excellent support to them and document new use cases (like how it works in a different specialty if applicable).

    - *Broader Marketing & Sales:* Now that you have a proven product and some funding for runway, do a concerted push into the NHS market. This may involve responding to NHS tenders/frameworks (get onto procurement frameworks like G-Cloud or NHS Supply Chain if relevant for software), hosting webinars aimed at NHS leadership, and leveraging any NHS connections from your investors or advisors. Also, begin exploring opportunities in the private sector or abroad (for instance, a demo with a US hospital chain's innovation team) as a precursor to international expansion.

- **Months 19-24: Evaluation and Next Steps**

    - *Outcomes Data:* By around Month 24 (2 years in), you should have solid data on *Clerky*'s performance from multiple sites. This could lead to a **white paper or publication** in a medical journal about the effectiveness of *Clerky*. Publishing results will further establish credibility.

    - *Next Funding or Growth:* If revenue is growing, you might not need immediate further funding. Otherwise, plan for a **Series A** raise around 18-24 months if scaling rapidly (especially for international expansion). Use the achievements (regulatory approval, X number of hospitals using *Clerky*, proven ROI metrics)

to justify this larger raise.

- *Agentic AI Integration:* By this time, ideally your use of agentic AI internally has given you a competitive edge (faster dev cycles, lower burn). Continue to integrate AI deeply in both product and operations – making it a selling point that *Clerky* itself is built by leveraging the kind of AI efficiencies it offers to clients (a nice narrative for press and perhaps for an eventual acquisition by a tech giant).

Each of these phases builds on the previous, de-risking the venture step by step: first establishing the company and prototype, then validating in the field, then scaling up with investment. The timeline should remain flexible – unexpected challenges or opportunities will arise (for example, a pandemic wave or a sudden NHS initiative might shift schedules), but this roadmap provides a structured path. By following this plan, at the 1-2 year mark, *Clerky* should transition from a side project into a fully-fledged startup with real-world impact, a growing user base, and a trajectory for nationwide adoption and beyond.