1. Purpose

In my 30+ year career, several themes stand out. Systems are rarely designed around how work is actually done; more often, they are designed around how work *was* done, or how someone wished it would be done. Today, processes are continually evolving—"finished" is elusive, and the best that can be done is to keep systems aligned with reality.

By taking a historical view of a company's evolution and its core processes, patterns emerge that reveal opportunities for periodic *drift alignment*. This involves building adjustment characteristics into systems so they can evolve naturally as work itself evolves.

To get where you want to be, you must first know precisely where you are. Our purpose is to implement solutions that meet the requirements that make them necessary *today*, while remaining adaptable to future change. By starting with purpose and learning from history, we deliver systems designed for long-term use, not short-term compliance.

---

2. Core Values and Philosophy

Philosophy Statement

We build software and design systems that respect how work is done and consider the people who do it, rather than imposing rigid structures. Our approach is rooted in deep understanding before action, leading to more robust and effective solutions. We refuse to take a template designed for one company and force another to fit. Instead, we build precisely what is needed, ensuring our clients are never given a handicap.

Core Values

Clarity

We, as individuals and organizations, can drift just like everything else. We maintain clarity of purpose by holding a clear mental image of the desired outcome and continuously evaluating whether our efforts are moving us closer to that image.

Our methodology is rooted in simplicity. Complexity is tempting, but often misleading; the more complex a hypothesis becomes, the further it tends to drift from truth. When work begins to feel overly complex, we pause to reassess direction. This moment of clarity often prevents compounding effort later in a project.

Integrity

Integrity is alignment. We operate with honesty and transparency, ensuring our actions consistently match our stated values and commitments. What we say, document, and deliver remains consistent across environments and circumstances.

Strong foundations endure. Every interaction—from the first conversation forward—contributes to that foundation and supports sustainable, long-term relationships.

Continuous Growth

We are committed to ongoing learning and improvement, both personally and within the systems we build. Each iteration reveals new insight. We are not afraid to adopt new methods when they serve the purpose, guided by curiosity and disciplined experimentation.

Empathy

We strive to understand our clients and collaborators, recognizing that trust is built through patience, listening, and shared perspective.

Respect

We value diverse viewpoints and treat all individuals with dignity. Because of this, we respond thoughtfully rather than react impulsively.

Guiding Principles

Purpose Above All

Every solution we develop is rooted in solving real needs. Systems are vessels through which solutions are sustained and expanded. When a system proves reliable, it naturally grows to replace failing systems around it.

Respect for Original Intent

Each scenario is unique. We begin by understanding the original intent of a system before extending it. Expansion is approached thoughtfully, balancing new requirements with existing design boundaries.

Our Nature, Not a Goal

Our values are not aspirations; they define how we operate today. They guide every decision and interaction.

Client-Centered Understanding

We begin each engagement by understanding the client's intent without assumptions or constraints, ensuring solutions reflect real needs rather than imposed structures.

---

3. Services & Value Propositions

What Makes Us Different

Our difference lies not only in what we build, but in how and why we build it. We do not simply deliver software; we deliver understanding, respect, and partnership. Our systems evolve alongside our clients, supporting their unique journeys and empowering their people. This approach forms the foundation of long-term trust.

How We Select the Right Solution Elements

Adopting a templated technology also means inheriting its limitations. While platforms can provide value when they align closely with a client's goals, we never assume suitability. We evaluate whether a platform supports efficient execution and reliably enables the client's vision. The goal is always dependable outcomes; everything else is negotiable.

Core Offerings

Microsoft Ecosystem (PowerApps, Power Automate)

We modernize and organize business processes using SharePoint, Dataverse, PowerApps, and Power Automate to create custom management tools tailored to real workflows.

Workflow Architecture

We design lean workflows that meet operational requirements and support audit readiness where needed.

React / JSX Development

When platform constraints conflict with methodology, we build custom systems using modern architecture. These systems are designed for adaptability from the outset and remain aligned over time through periodic drift assessments. Our solutions feel like an extension of the client's workspace because they are built around how work is actually done.

---

4. Market & Positioning

Who We Serve

We primarily serve small to medium-sized businesses across diverse industries that seek tailored, scalable technology solutions. Our clients value personalized service, flexibility, and systems that grow with their evolving operational needs. These organizations often face challenges with off-the-shelf software that fails to accommodate their unique workflows or business models.

What Problems We Solve

We address critical pain points such as inefficient workflows, lack of system adaptability, poor user adoption due to rigid templates, and difficulties in maintaining alignment between business processes and technology solutions. Our approach eliminates common frustrations by delivering custom-built systems that reflect real-world operations and evolve alongside our clients.

Why Our Approach Fits Small/Medium Businesses

Small and medium enterprises require solutions that are both cost-effective and highly adaptable. Unlike large-scale enterprise software that can be overly complex and rigid, our methodology emphasizes agility, customization, and close client collaboration. This ensures rapid deployment, minimal disruption, and ongoing alignment with business goals, making us an ideal partner for growing businesses.

Where We Sit in the Ecosystem

We position ourselves as trusted technology partners who bridge the gap between generic software providers and bespoke development firms. Leveraging the Microsoft ecosystem alongside modern development frameworks, we offer a hybrid approach that combines the reliability of established platforms with the flexibility of custom code. This unique positioning allows us to deliver solutions that are both robust and tailored, meeting the nuanced demands of our clients.

---

5. Operating Model

Our operating model prioritizes quality and alignment. We grow deliberately, often focusing on one client at a time to ensure consistent attention and accountability.

Client Engagement

Each engagement begins with a value proposition that outlines alignment between client needs, methodology, and outcomes.

Internal Tools

We use Microsoft Business tools for internal operations and QuickBooks Online for finance and accounting.

Project Execution

Projects are delivered using either Microsoft platforms or custom codebases built with React, Node.js, JSX, and Express, depending on requirements.

Project Lifecycle

Intake → Assessment → Build → Deliver → Support

Design Review & Feedback

Documented designs are reviewed and approved before development begins. Continuous feedback ensures alignment throughout the project lifecycle.

Project Management

PMI principles guide planning, while Agile practices support execution and adaptability.

---

5. Talent Pipeline

Roles Needed

Evolving toward:

- Fractional, contract, advisory, or specialist roles depending on engagement.

Currently:

- Per-project specialists
- Dynamic according to client needs

Microsoft Ecosystem

PowerApps Developers

- Strong with forms, dashboards, data modeling
- Understand left/right pane architecture

- Translate business logic into usable interfaces

Power Automate Specialists

- Workflow design

- Cascading approvals

- Task assignment logic

- Status/state transitions

- Data movement across systems

Code-Base Development

React / JSX Developers

- Modular architecture

- Template-driven UI

- Minimal, intentional implementation

- Clean separation of concerns

ERP-Lite / Business Software Support

Developers or analysts who can:

- Stabilize the existing erpLite codebase

- Bring it to a predictable, maintainable version

- Support incremental improvements

Where These People Live

Initial contact / discovery through:

- University contact (first outreach point)

Build reputation, then expand into:

- LinkedIn (targeted search + alumni networks)

- Local professional networks

- Industry groups

- Referrals from trusted partners

- Tech meetups / dev communities

Approach:

- Thoughtfully considerate

- Aware that business decisions affect real lives

- Promote positive outcomes

- Maintain an unbiased, grounded perspective

Contact Rules

To grow and protect our reputation — and align with our philosophy of respectful, value-first engagement:

- No cold-spam

- Respect opt-ins and boundaries

- Follow university guidelines (likely provided)

- Keep outreach human, not transactional

- Make the value clear before asking for anything

Outreach Cadence (Light, Respectful, Value-First)

Initial Contact

- Who we are

- What we do

- Our philosophy (purpose → structure → implementation)

- Why we build the way we build

Second Touch

- Methods we use to apply that philosophy

- How we design workflows, interfaces, and systems

- What makes our approach different

Third Touch

- What help we need

- Where they might fit

- Opportunities available (fractional, contract, advisory, specialist)

Ongoing

- Occasional check-ins

- Updates on projects or opportunities

- Invitations to collaborate or learn

---

5. Pipeline Flow

Approval → Contact → Follow-Up → Nurture

Approval

- Confirm they're appropriate to contact

- Ensure compliance with university or network rules

Contact

- Light, respectful introduction

- Clear value proposition

Follow-Up

- Clarify fit

- Explore interest

- Share more detail

Nurture

- Keep warm

- Maintain relationship

- Offer opportunities when aligned

6. Pricing & Packaging

- Engagement types (fractional, project-based, advisory)

    o Project based

        ▪ Any initiative a company would like to contract out, within the scope of our publicized catalog of services.

    o Fractional

        ▪ Any portion of a project, being scoped as a deliverable or work package, that could be considered under the first engagement type.

    o Advisory

        ▪ Conduct a site survey and assessment to identify deviations in process and system alignment.

        ▪ Recommendations on method of correction, or realignment.

        ▪ Opportunity to integrate system enactments to facilitate realignment based on current efforts and historic pattern of drift.

- Transparent, predictable structure

- Value-aligned pricing

- Project Based Pricing

    o The project components (tech stack, environment, scope) together determine pricing.

    o If they are providing a professional project manager to manage scope, cost, and schedule, as well as track risks and issues, for the length of the project, we will offer 5% to 10% discount.

    o A lean implementation, utilizing Microsoft Business Premium components, for a core process of a sales order and service driven demand on product stock, with procurement triggering, invoice content generation, asset management and depreciation, shipping prompting. supporting the life cycle of initial client request, either as a sales order, or service request, through delivery. This includes foundational elements of Sales, Production Planning,

	Service	Description	Rate
Core Development & Architecture			
	SharePoint Site Development	Site collections, libraries, lists, permissions, branding	$65/hr
	Power Platform Integration	Power Automate workflows, Power Apps forms, Dataverse modeling	$75/hr
	Custom Coding	Python, TypeScript, CSS for embedded tools or enhancements	$85/hr
Process Design & Governance			
	Workflow & Taxonomy Design	Metadata schema, naming conventions, automation logic	$70/hr
	Governance & Compliance Setup	Roles, audit schedules, retention policies, backup plans	$65/hr
	Documentation & Training	User guides, walkthroughs, FAQs, support channels	$60/hr
Content Support & Admin Tasks			
	Service	Description	Rate
	Content Migration & Uploading	Bulk uploads, tagging, versioning, permissions setup	$45/hr
	List & Library Maintenance	Updates, cleanup, metadata alignment	$40/hr
	User Support & Troubleshooting	Permissions issues, document recovery, basic training	$55/hr

  o   Service Ticketing, Customer Service, Workflow Administration, Human Resources, and Finance.

Price: $35,000

Client then owns a custom software package / system, developed to their specific needs and ways of conducting business that lays in interfaces, workflows, automation (where appropriate), handling all aspects of sales order or service request received, thru product build and/or service with consumables tracking, technician time, forecasting demand on component stocks, procurement lead toiem, risk to agreed upon SLA unique to each client. Completing the cycle with shipping prompting and invoice content for processing.

Free of subscription costs. No recurring costs.

This can be adapted to any business that, in whole or in part, has clients who purchase products from them. Products that they then have to build, where forecasting demand on stock to trigger procurement, compensating for vendor lead time required. And following through to successful completion of the client's request within the promised delivery schedule holds value.

Fractional engagement pricing is based on function (expand for rates)

These rates are intended for just me, one dev. not a company that wil devote min. 2 specialists that also has fees, benefits, etc to pay.

-

Consulting (I'm not sure I want to offer this as a service, feels like a potential for liability)

---

7. Risk Map

Client Misalignment

Risk

Client expectations don't match actual workflow realities or project scope.

Mitigation

Observation-first discovery, documented assumptions, a continuous feedback loop between the client and the Discrete Development project lead, and early validation prior to build commitment.

Scope Creep

Risk

Evolving processes introduce unplanned complexity.

Mitigation

Modular system design, clearly defined delivery phases, and change-controlled iteration points aligned with operational reality.

Over-Customization

Risk

Highly tailored solutions become fragile or difficult to maintain over time.

Mitigation

Reuse of proven methods, intentional simplicity, and documentation of intended growth paths where designs explicitly account for future functionality.

Client Dependency

Risk

Clients become reliant on Discrete Development for routine adjustments or ongoing changes.

Mitigation

Transparent architecture, clear documentation, and structured knowledge transfer that enable client independence, with optional extended support engagements available where ongoing partnership is desired.

Market Education Gap

Risk

Prospective clients may not immediately recognize the value of "less, but better" system design.

Mitigation

Clear positioning, practical examples, and demonstrated outcomes that show how simple, well-considered designs often prove more robust and adaptable than complex implementations.

Delivery Continuity & Resource Flexibility

Risk

Fluctuating project demand requires scalable expertise without compromising quality or consistency.

Mitigation

A dynamic project team model that scales based on demand, supported by standardized delivery frameworks, documentation-first design practices, and a trusted network of collaborators engaged as required.

---

8. Growth Plan

Growth Philosophy

Discrete Development prioritizes measured, sustainable growth over rapid expansion. The focus is on depth of engagement, quality of delivery, and reputation earned through execution rather than volume.

Near Term Growth Strategy

Visibility & Positioning

Establish a clear and consistent presence that communicates who we are, what we do, and how we work. Growth begins with being discoverable and understandable to the right audience.

Focused Client Engagement

Maintain primary focus on one active client engagement at a time, ensuring full attention, quality, and outcome ownership.

Pipeline Continuity

While actively engaged, maintain one additional qualified client opportunity "on deck" to ensure continuity without overextension.

Growth Controls

Intentional Intake

New work is accepted selectively to preserve delivery quality and alignment with Discrete Development's methodology.

Reputation-Led Expansion

Growth is driven through referrals, demonstrated outcomes, and repeat engagements rather than aggressive sales or broad outreach.

Long-Term Outlook

As demand increases, Discrete Development expands capacity through its dynamic project team model, adding capability as required while maintaining consistency through standardized delivery frameworks and documentation-first practices.

As demand fluctuates, capacity is adjusted intentionally to reflect market conditions, ensuring sustainability, delivery quality, and operational resilience across varying economic environments.

---

9. Financial Assumptions

Discrete Development operates with a lean cost structure designed to remain flexible, predictable, and aligned with actual demand.

Operating Costs

Overhead is intentionally limited and primarily consists of essential business tools and services, including productivity and collaboration software licenses, paid training for recurring project collaborators, and targeted marketing efforts. Marketing spend is planned conservatively, with a target budget of approximately $3,000 per month, adjusted based on demand and effectiveness.

Revenue Model

Revenue is generated through project-based engagements and scoped advisory work. Rather than fixed monthly revenue targets, the firm prioritizes sustainable engagement flow that supports contributor compensation, overall business health, and reinvestment.

As a planning assumption, revenue is structured to support:

- Core contributor compensation aligned with active project demand

- Ongoing operational costs

- Modest reinvestment in tools, training, and marketing

This approach avoids overextension and allows revenue expectations to scale naturally with workload and market conditions.

Cash Flow Considerations

Project structuring, milestone-based billing, and controlled intake are used to maintain positive cash flow and minimize financial strain during periods of demand fluctuation.

Sustainable Growth

Financial decisions are guided by long-term sustainability, delivery quality, and operational resilience rather than short-term expansion targets.

Illustrative financial ranges and supporting assumptions are available upon request.

---

10. Brand & Operating Philosophy

Discrete Development is founded on the belief that effective systems must reflect how work is actually performed, not how it is assumed to occur.

Processes evolve, constraints shift, and edge cases often reveal more than standard scenarios. Discrete Development designs software and operational systems that acknowledge this reality, prioritizing clarity, adaptability, and long-term usefulness over rigid abstraction or excessive complexity.

Design Philosophy

The firm believes that sophistication is best expressed through restraint. Systems are designed to support users without imposing unnecessary structure, allowing tools to integrate naturally into existing workflows. Emphasis is placed on modularity, documentation, and clear interfaces so solutions can evolve without breaking as conditions change.

Operating Approach

Work begins with observation and understanding before design or implementation. Discrete Development engages deeply with a limited number of clients at any given time to ensure focus, accountability, and outcome ownership.

Solutions are treated as long-term assets rather than short-term fixes. Each engagement aims to leave behind infrastructure that retains value, supports future growth, and reduces reliance on ad hoc workarounds.

Engagement Discipline

The firm intentionally limits concurrent primary engagements to preserve delivery quality and alignment. Additional scoped or advisory work may be accepted when appropriate, but not at the expense of focus or execution standards.

This disciplined engagement model protects both the client's investment and the integrity of the work.

Client Expectations

Clients can expect direct communication, transparent decision-making, and systems designed around their specific environment rather than generalized templates. Discrete Development takes responsibility for outcomes, not just deliverables, and prioritizes clarity in architecture, tradeoffs, and long-term implications.

Values & Boundaries

Discrete Development does not pursue one-size-fits-all solutions, half-measures, or volume-driven growth. Work is accepted selectively, with an emphasis on sustainability, quality, and alignment over speed or scale.

This philosophy reflects experience gained through years of hands-on problem solving in complex, real-world environments and serves as a guiding framework for all strategic and operational decisions.

---

11. Communication Principles

Discrete Development communicates with the same clarity and restraint that guides its system design.

Language is direct and literal. Abstraction is avoided where clarity will suffice. Structure and organization are used to convey meaning rather than emphasis or ornamentation.

Visual identity, written materials, and client communications prioritize simplicity, consistency, and readability. Design choices favor negative space, limited color palettes, and understated typography to reflect the firm's focus on clarity and function over decoration.

Across all channels, communication is intended to be transparent, calm, and precise, reinforcing trust and reducing friction throughout the engagement lifecycle.