Adaptive Business Framework Platform - Provisional Patent Description

1. FIELD OF THE INVENTION

The present invention relates generally to business management software systems, and more particularly to a computer-implemented method and system for enabling organizations to dynamically adapt their operational software between different business methodologies and frameworks without requiring data migration, system reconfiguration, or loss of historical information. This invention addresses the fundamental problem of organizational evolution, where companies naturally outgrow or need to change their operational frameworks but are locked into rigid software systems designed for single methodologies.

2. BACKGROUND OF THE INVENTION

Business organizations worldwide adopt various operational frameworks to structure their growth and manage their operations. Popular frameworks include the Entrepreneurial Operating System (EOS), Objectives and Key Results (OKRs), The 4 Disciplines of Execution (4DX), Scaling Up (Rockefeller Habits), and numerous proprietary methodologies. Each framework has its own terminology, cadences, structures, and philosophical approaches to business management.

Currently, software solutions in this space are framework-specific. For example, Ninety.io, Bloom Growth, and Traction Tools exclusively serve organizations using EOS. Weekdone and Gtmhub are built specifically for OKRs. Scaling Up practitioners use Align or Rhythm Systems. This rigid framework-specific approach creates several critical problems:

Migration Impossibility: When an organization evolves beyond its current framework or decides to adopt a different methodology, it must abandon its existing software platform entirely. This means losing years of historical data, institutional knowledge, and established workflows. The cost and disruption of switching platforms often locks organizations into suboptimal frameworks simply because the switching cost is too high.

Data Loss and Fragmentation: Organizations attempting to switch frameworks must export their data from one system and attempt to import it into another, but the fundamental incompatibility between framework-specific data models means significant information is lost in translation. A "Rock" in EOS has different attributes and behaviors than a "Key Result" in OKRs, making true data portability impossible.

Hybrid Approach Limitations: Many organizations benefit from using elements of multiple frameworks - for example, using EOS meeting structures while adopting OKR goal-setting principles. Current solutions force an all-or-nothing choice, preventing organizations from crafting hybrid approaches that best suit their needs.

Consultant Lock-in: Business consultants who specialize in multiple frameworks must purchase and maintain separate software subscriptions for each methodology they support, creating inefficiency and added costs.

3. BRIEF SUMMARY OF THE INVENTION

The present invention solves these problems through a revolutionary adaptive architecture that separates data storage from presentation, enabling seamless transitions between business frameworks while preserving complete data integrity and history.

At its core, the invention comprises three interconnected systems:

1. A Universal Data Schema that stores business information in a methodology-agnostic format, capturing the essential business concepts that exist across all frameworks while maintaining the flexibility to accommodate framework-specific nuances.

2. A Dynamic Translation Engine that maps universal data concepts to framework-specific terminology and structures in real-time, enabling instant switching between methodologies without any data transformation or migration.

3. An Intelligent UI Generation System that dynamically creates framework-appropriate interfaces, workflows, and visualizations based on the selected methodology, ensuring users experience a native, purpose-built application regardless of their chosen framework.

The system enables organizations to switch between frameworks instantly - what was a "Rock" in EOS becomes a "Key Result" in OKRs, complete with appropriate attributes, behaviors, and visualizations. Historical data is preserved and recontextualized appropriately, allowing organizations to view their past performance through the lens of their current framework.
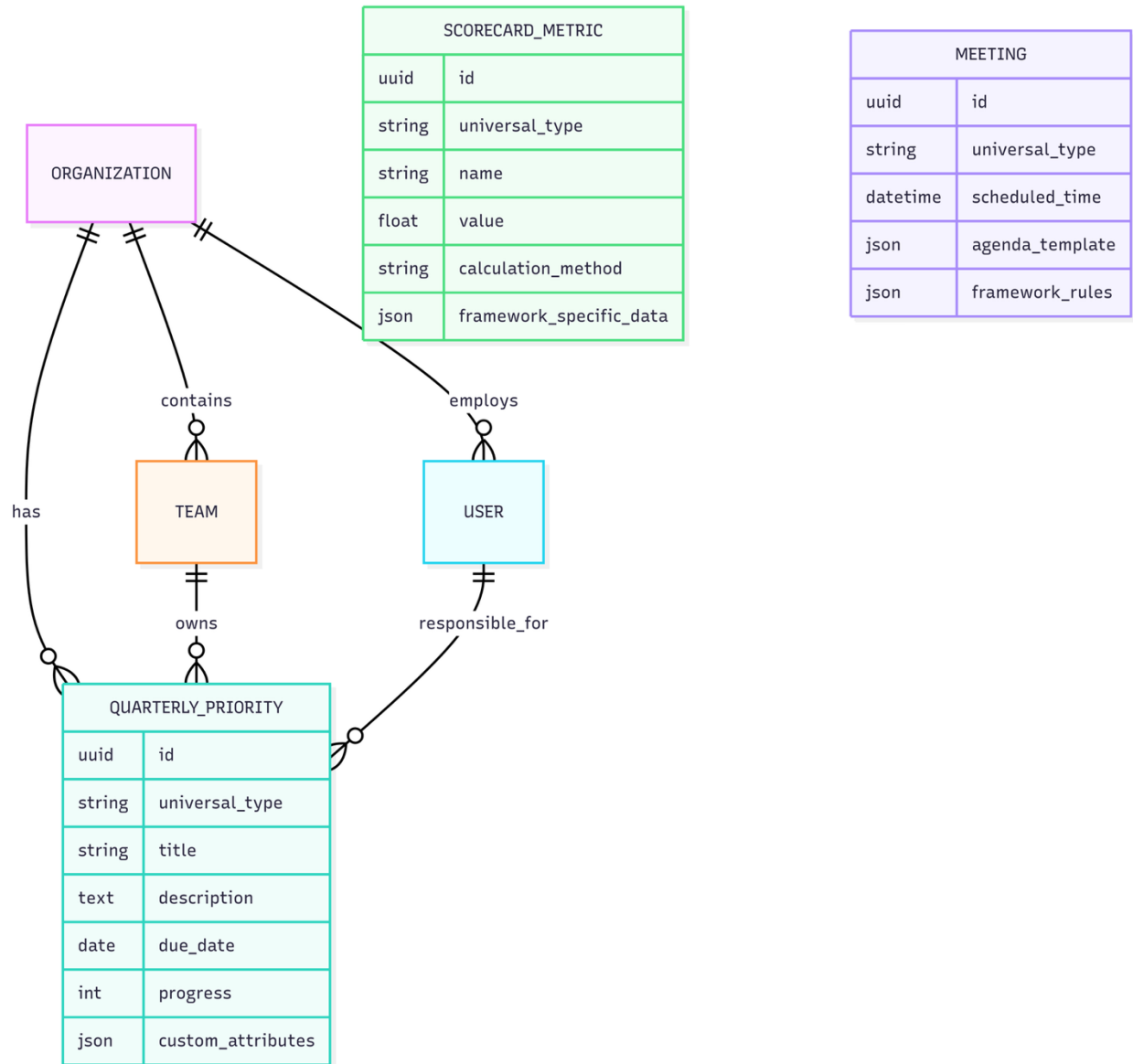
4. DETAILED DESCRIPTION OF THE INVENTION

4.1 System Architecture

The Adaptive Business Framework Platform employs a multi-layered architecture that fundamentally decouples data storage from presentation logic.
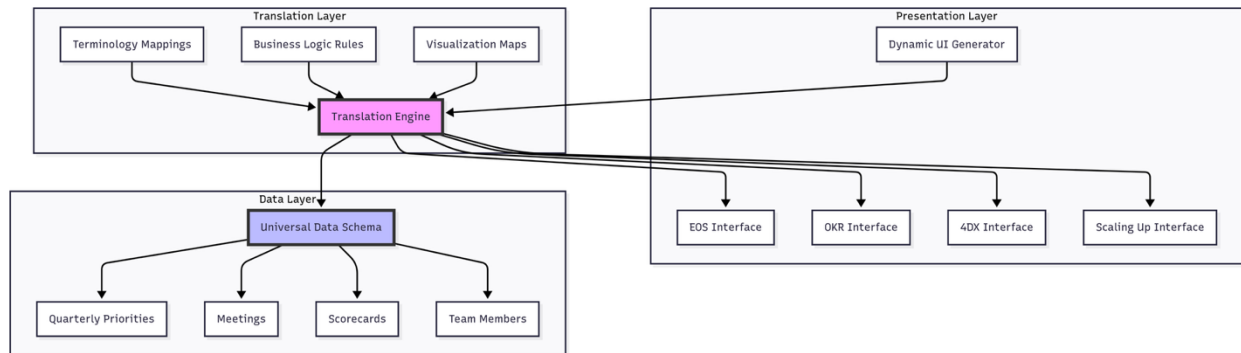
Universal Data Layer:

At the foundation, all business data is stored in a universal schema that captures common business concepts across all frameworks. For example, instead of storing "Rocks" (EOS) or "Key Results" (OKRs) or "WIGs" (4DX), the system stores "quarterly_priorities" with a rich set of attributes that can accommodate the needs of any framework:

SCORECARD_METRIC

uuid	id
string	universal_type
string	name
float	value
string	calculation_method
json	framework_specific_data

MEETING

uuid	id
string	universal_type
datetime	scheduled_time
json	agenda_template
json	framework_rules

ORGANIZATION

TEAM

USER

- ORGANIZATION — contains — TEAM
- ORGANIZATION — employs — USER
- ORGANIZATION — has — QUARTERLY_PRIORITY
- TEAM — owns — QUARTERLY_PRIORITY
- USER — responsible_for — QUARTERLY_PRIORITY

QUARTERLY_PRIORITY

uuid	id
string	universal_type
string	title
text	description
date	due_date
int	progress
json	custom_attributes

```
quarterly_priority {

  id: unique_identifier

  title: text

  description: text

  owner: user_reference

  due_date: date

  progress: percentage

  status: enumeration
```

```
  measurements: array[metrics]

  milestones: array[checkpoints]

  parent_objective: reference

  child_tasks: array[references]

  custom_attributes: json

}
```
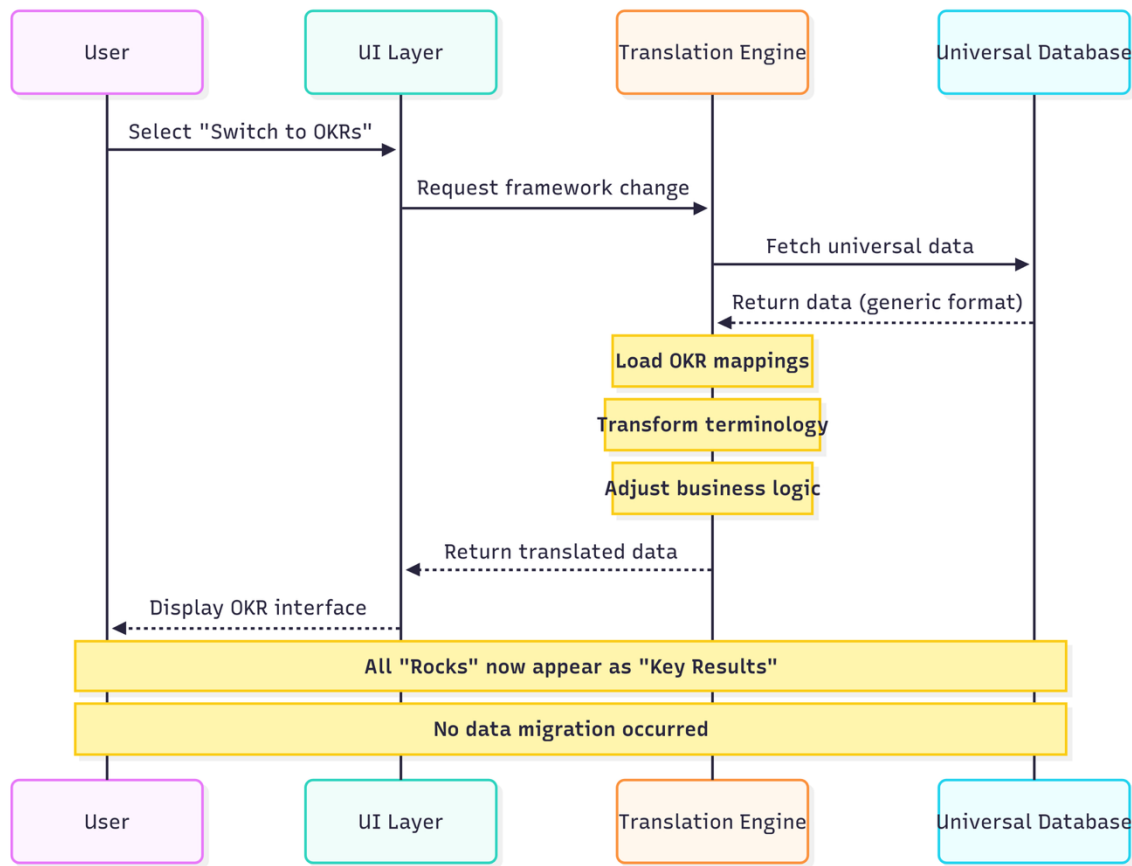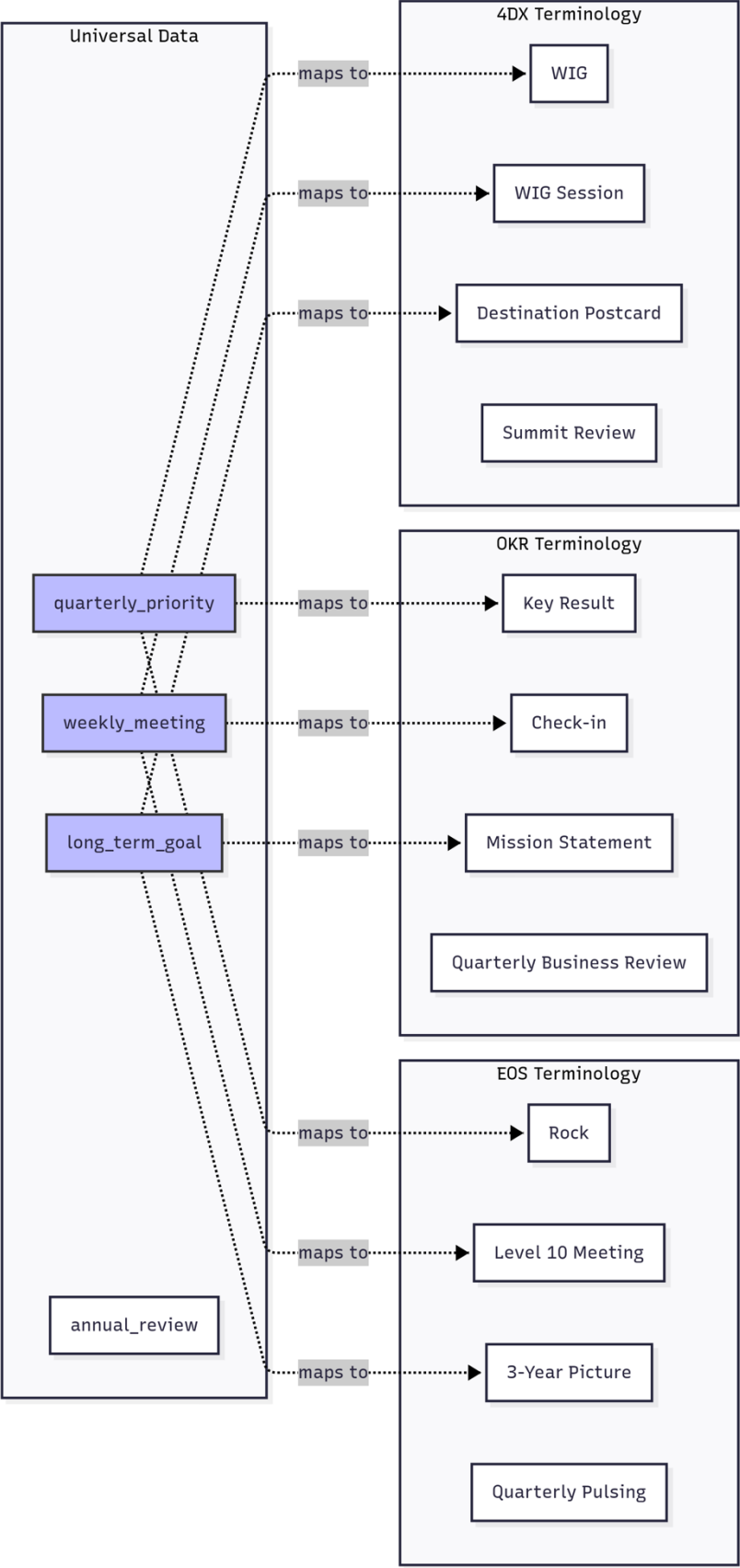
Translation Engine:

The translation engine maintains comprehensive mapping tables that define how universal concepts map to framework-specific terminology:

```
TranslationMap {

  EOS: {

    quarterly_priority: "Rock",

    weekly_meeting: "Level 10 Meeting",

    long_term_goal: "3-Year Picture",

    annual_goal: "1-Year Plan"

  },

  OKR: {

    quarterly_priority: "Key Result",

    weekly_meeting: "Check-in",

    long_term_goal: "Mission",

    annual_goal: "Annual Objectives"

  },

  4DX: {

    quarterly_priority: "WIG",

    weekly_meeting: "WIG Session",

    long_term_goal: "Destination Postcard",

    annual_goal: "Annual Targets"

  }

}
```

Universal Data

- quarterly_priority
- weekly_meeting
- long_term_goal
- annual_review

4DX Terminology

- WIG
- WIG Session
- Destination Postcard
- Summit Review

OKR Terminology

- Key Result
- Check-in
- Mission Statement
- Quarterly Business Review

EOS Terminology

- Rock
- Level 10 Meeting
- 3-Year Picture
- Quarterly Pulsing

maps to → WIG
maps to → WIG Session
maps to → Destination Postcard
maps to → Key Result
maps to → Check-in
maps to → Mission Statement
maps to → Rock
maps to → Level 10 Meeting
maps to → 3-Year Picture

Dynamic UI Generator:

The UI generation system reads the current framework selection and dynamically constructs appropriate interfaces. This goes beyond simple label changes - it restructures entire workflows, adjusts meeting templates, modifies calculation logic, and presents data in framework-appropriate visualizations.

4.2 Method of Operation

The system operates through the following process:
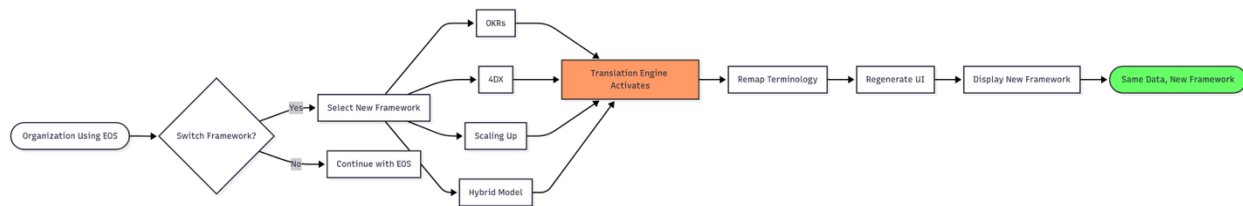
Step 1: Framework Selection

When a user selects or changes their operational framework, the system triggers a comprehensive UI regeneration process. This selection can be manual (user choice) or automatic (based on AI recommendations).

Step 2: Translation Activation

The translation engine loads the appropriate mapping configuration for the selected framework. This includes terminology mappings, business logic rules, calculation methods, and display preferences specific to that framework.

Step 3: UI Regeneration

The interface dynamically reconstructs itself to match the selected framework's conventions. Menu items, form fields, dashboard widgets, and reports all adapt to use framework-appropriate terminology and layouts. For example, an EOS view shows a "VTO" (Vision/Traction Organizer) while an OKR view displays an "OKR Tree" - both visualizing the same underlying data differently.

Step 4: Logic Adaptation

Business logic adjusts to match framework requirements. EOS "Rocks" are binary (done/not done) while OKR "Key Results" use graduated scoring (0.0 to 1.0). The system automatically adjusts calculation methods, progress tracking, and scoring mechanisms to match framework expectations.

Step 5: Historical Recontextualization

Previous data is reinterpreted through the new framework's lens. Past "Rocks" appear as historical "Key Results" when switching to OKRs, with appropriate score translations and progress interpretations.
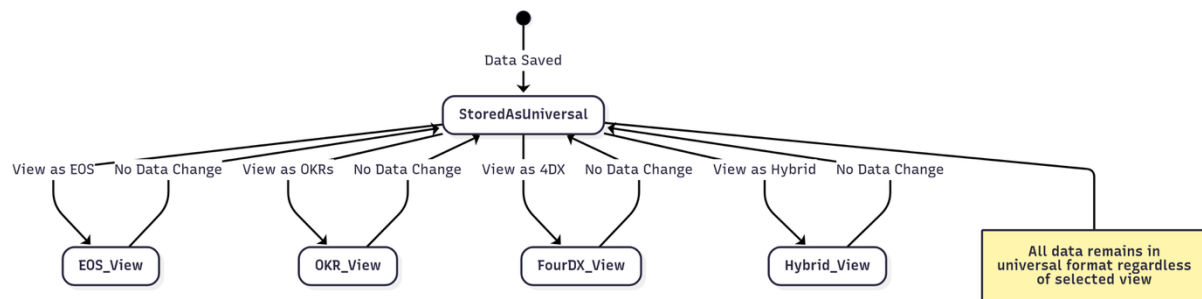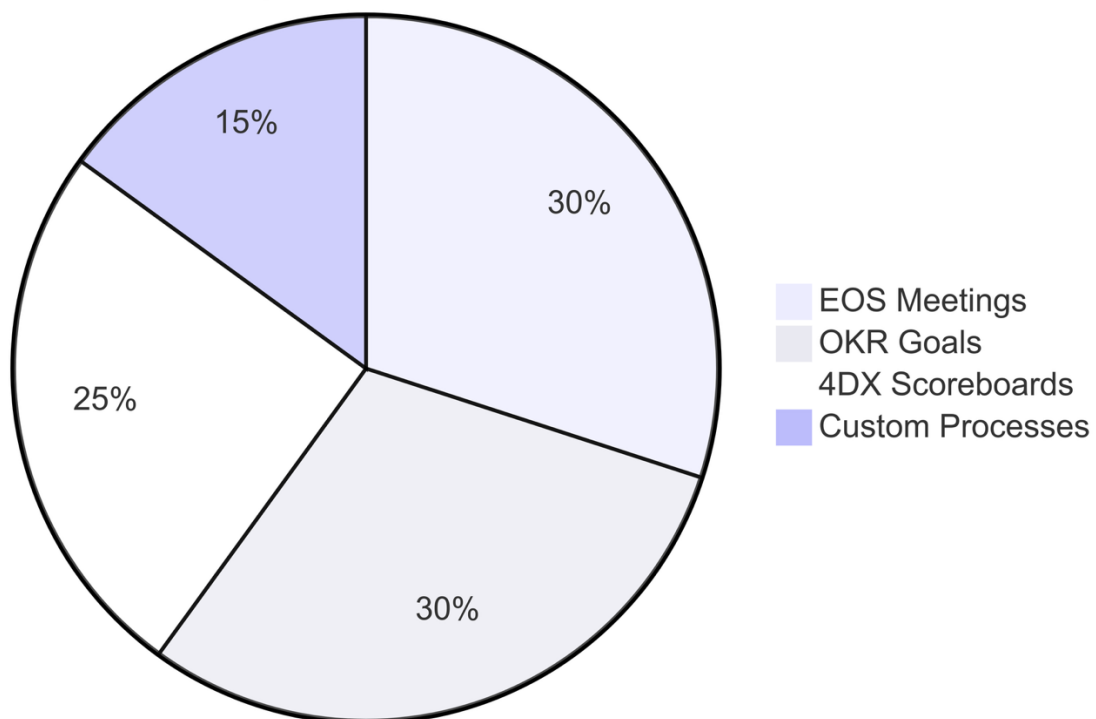
4.3 Innovative Features

Hybrid Framework Support:

Organizations can select different frameworks for different aspects of their operations. For example:

- Use EOS meeting structures

- Adopt OKR goal-setting methods

- Apply 4DX scoreboard visualizations

- Implement Scaling Up hiring processes

Organization's Hybrid Framework Selection

Intelligent Framework Recommendation:

The system analyzes organizational metrics and characteristics to recommend optimal frameworks:

- Company size and growth rate

- Industry vertical

- Team distribution (remote vs. co-located)

- Current performance metrics

- Cultural indicators
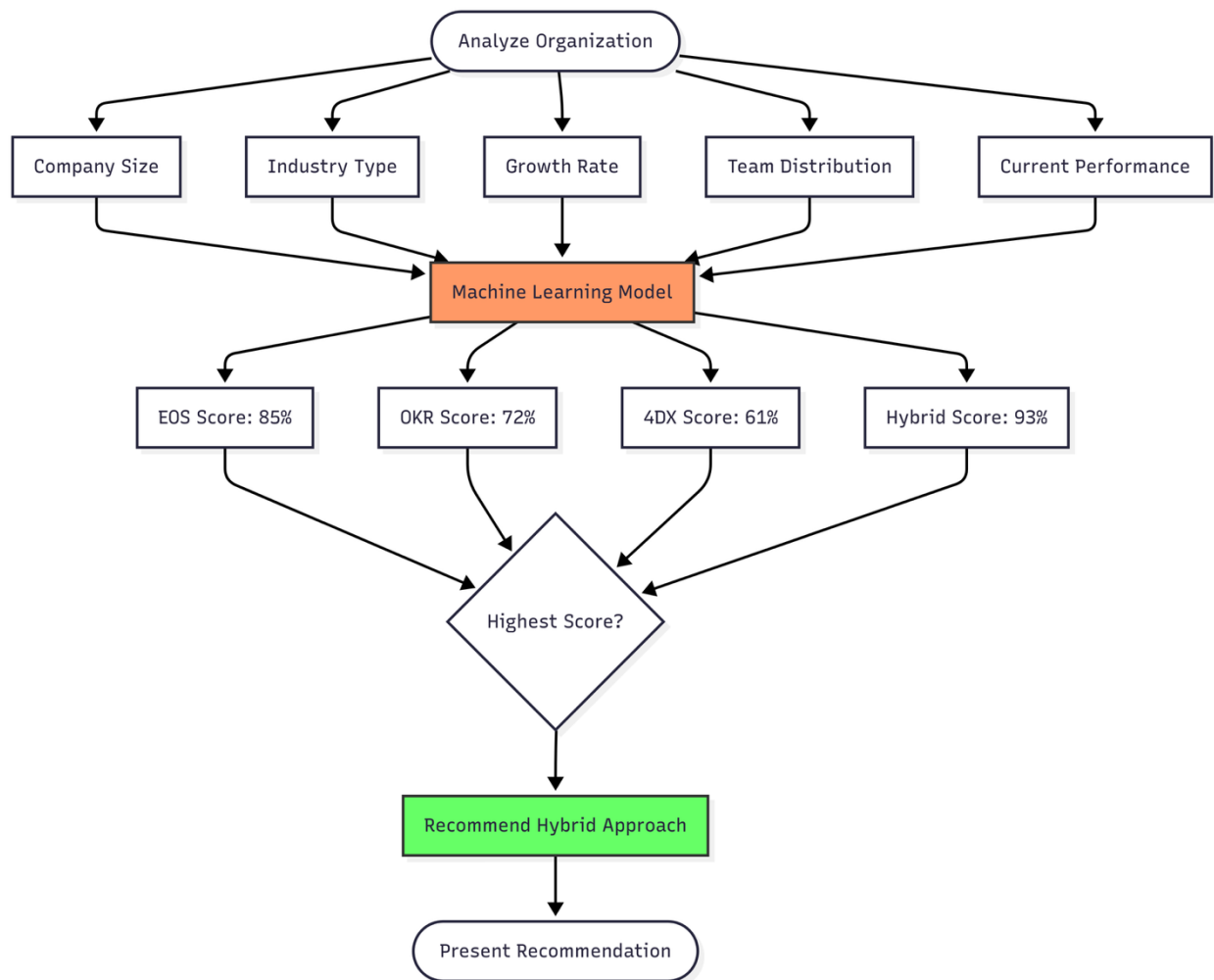
Framework Evolution Tracking:

The system maintains a complete history of framework transitions, allowing organizations to analyze which methodologies were most effective during different growth phases.
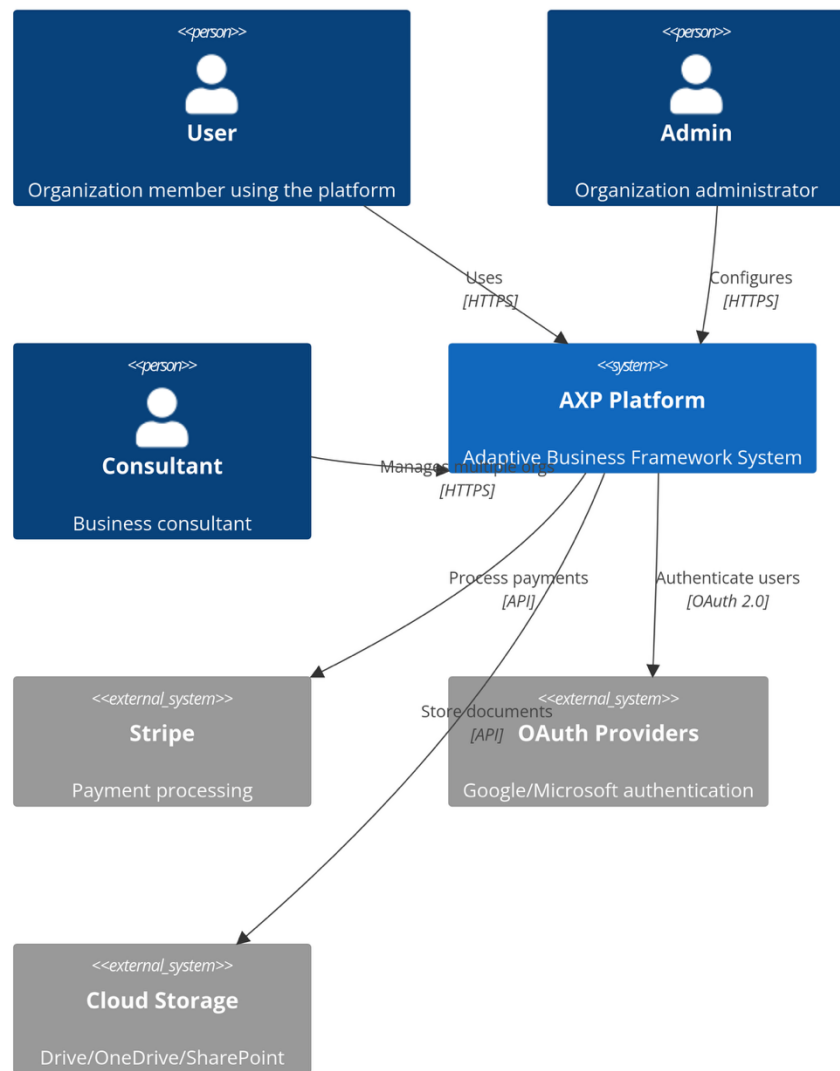
Consultant Mode:

Enables consultants to manage multiple client organizations, each using different frameworks, from a single account with instant context switching.

4.4 Technical Implementation Details

The invention is implemented as a cloud-based software-as-a-service (SaaS) platform using modern web technologies:

System Context Diagram - Adaptive Business Framework Platform

User
<<person>>
Organization member using the platform

Admin
<<person>>
Organization administrator

Consultant
<<person>>
Business consultant

AXP Platform
<<system>>
Adaptive Business Framework System

Stripe
<<external_system>>
Payment processing

OAuth Providers
<<external_system>>
Google/Microsoft authentication

Cloud Storage
<<external_system>>
Drive/OneDrive/SharePoint

Uses [HTTPS]
Configures [HTTPS]
Manages multiple orgs [HTTPS]
Process payments [API]
Authenticate users [OAuth 2.0]
Store documents [API]

Frontend Architecture:

- React-based single-page application

- Dynamic component rendering based on framework selection

- Real-time updates using WebSocket connections

- Responsive design adapting to desktop and mobile devices

Backend Architecture:

- RESTful API serving framework-agnostic data

- PostgreSQL database with universal schema

- Redis caching for translation mappings

- Microservices for specialized framework logic

Key Algorithms:

Translation Algorithm:

```
function translateConcept(universalConcept, targetFramework) {

  mapping = loadFrameworkMapping(targetFramework)

  translatedConcept = {

    terminology: mapping.terms[universalConcept.type],

    attributes: filterAttributes(universalConcept, mapping.supportedFields),

    calculations: mapping.calculations[universalConcept.type],

    display: mapping.displayRules[universalConcept.type]

  }

  return applyFrameworkLogic(translatedConcept, targetFramework)

}
```

Framework Compatibility Scoring:

```
function scoreFrameworkFit(organizationMetrics, frameworkCharacteristics) {

  score = 0

  score += matchSizeRange(organizationMetrics.employeeCount,
frameworkCharacteristics.idealSize)

  score += matchComplexity(organizationMetrics.complexity,
frameworkCharacteristics.complexity)

  score += matchCulture(organizationMetrics.culture,
frameworkCharacteristics.culturalFit)

  score += matchIndustry(organizationMetrics.industry,
frameworkCharacteristics.industryFit)

  return normalizeScore(score)

}
```

5. ADVANTAGES OVER PRIOR ART

The present invention provides numerous advantages over existing framework-specific solutions:
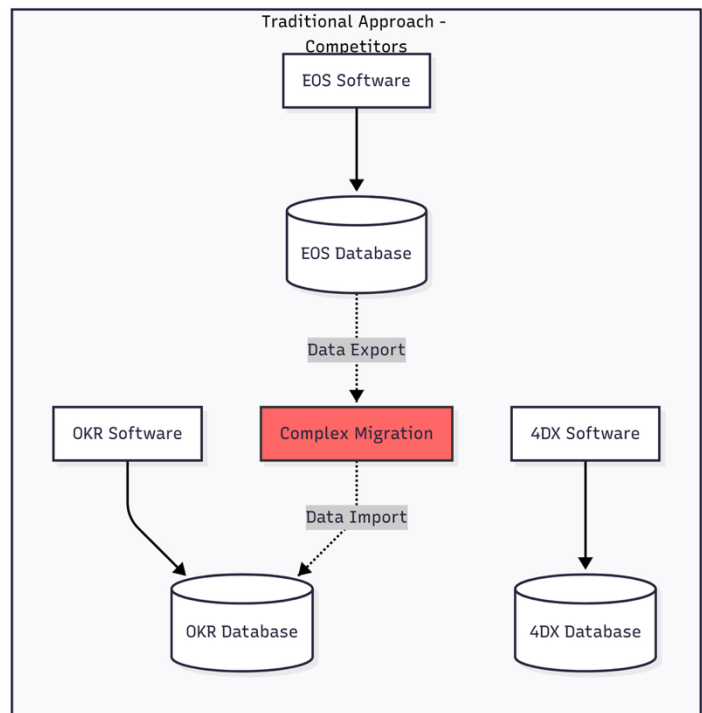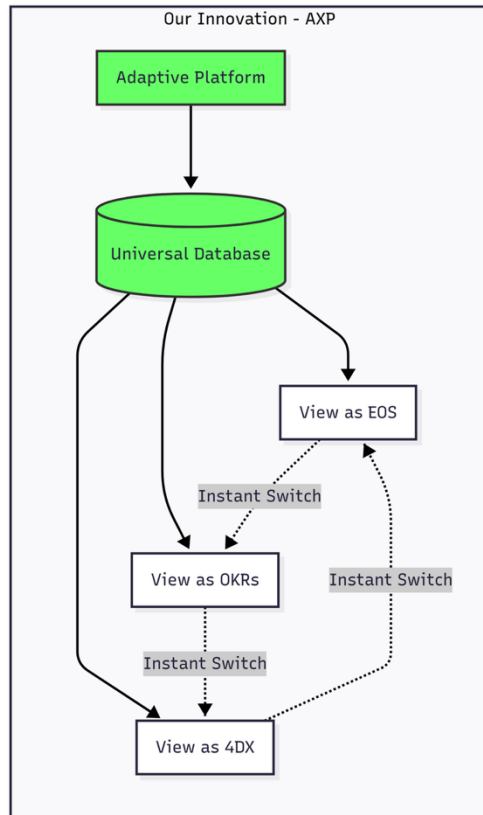
1. Zero Migration Cost: Organizations can switch frameworks instantly without any data migration, export/import processes, or system downtime.

2. Complete Historical Preservation: All historical data remains accessible and is automatically recontextualized in the new framework's terminology and structure.

3. Framework Agility: Organizations can experiment with different methodologies, adopt hybrid approaches, or evolve their framework as they grow without software constraints.

4. Reduced Software Costs: Instead of purchasing multiple framework-specific tools, organizations need only one adaptive platform.

5. Consultant Efficiency: Business consultants can serve clients using any framework from a single platform, reducing costs and complexity.

6. Future-Proof Architecture: As new business frameworks emerge, they can be added to the system through configuration rather than requiring fundamental architectural changes.

7. Improved Decision Making: Organizations can view their data through multiple framework lenses, gaining insights that would be impossible with framework-locked systems.

8. Seamless Transitions: When organizations hire new executives or consultants favoring different frameworks, the transition is seamless and non-disruptive.

9. Merger & Acquisition Compatibility: Companies using different frameworks can merge their operations without forcing either to abandon their methodology.

10. Continuous Evolution: Organizations can gradually evolve their methodology over time rather than making jarring wholesale changes.

This invention represents a fundamental shift in how business management software is conceived and constructed, moving from rigid, framework-specific tools to an adaptive, evolution-friendly platform that grows with organizations throughout their entire lifecycle.

Prepared for USPTO Provisional Patent Application

Invention Title: Adaptive Business Framework Platform

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