

ROOTED SaaS MVP: COMPLETE IMPLEMENTATION PLAN

Lee Develops, Inc. — Multi-Generational Leadership Platform

CRITICAL ASSUMPTIONS AND RISK REGISTER

Validated Assumptions

- 1. **Multi-generational workforce friction validated:** 68% of employers report cross-generational team challenges (Validation: SHRM 2025 Survey, January 2025)
- 2. **Market size confirmed:** \$89.5B leadership development market growing at 10.3% CAGR (Validation: FMI Market Research, March 2025)
- 3. **Pricing validation:** Mid-market gap exists between \$16/user tools and \$499+ executive coaching (Validation: Competitive analysis, August 2025)

Unvalidated Assumptions (REQUIRE VALIDATION)

- 1. **"15k+ assessment data points; ~47% cross-gen team improvement"** — Hypothesis requires pilot validation within 60 days
- 2. **Faith-based market willingness to pay enterprise pricing** — Validation method: 25 church leader interviews by October 15, 2025
- 3. **Book 1 content sufficient for 8-week engagement** — Validation method: Content audit and beta user testing by November 1, 2025
- 4. **Generational adaptation algorithms effective** — Validation method: A/B testing with control groups in pilot programs

Top Risks and Mitigations

Risk	Impact	Probability	Mitigation	Contingency Trigger
Claims validation failure	High	Medium	Design control group studies in pilots	<40% improvement in controlled testing
Content IP insufficient	High	Low	Expand to coaching methodology if needed	<55% weekly engagement in month 3
SOC 2 timeline overrun	Medium	Medium	Start compliance work in Week 1	Behind schedule by >2 weeks
Generational adaptation ineffective	High	Medium	A/B test with non-adaptive control	<10% engagement lift vs control

1. ONE-PAGE NARRATIVE (EXECUTIVE SUMMARY)

Problem: Generic Leadership Training Fails Multi-Generational Teams

Modern workspaces struggle with unprecedented generational friction. With 5 distinct generations working together (Gen Z 18%, Millennials 36%, Gen X 31%, Boomers 15%), leadership approaches that worked for homogeneous teams create confusion and disengagement. Churches managing volunteers across age groups, remote teams with distributed generations, and small businesses with multigenerational staff all report the same challenge: generic leadership training doesn't translate across generational boundaries.

Solution: Rooted Adaptive Leadership Platform

Rooted delivers generationally-adaptive leadership development through fractal patterns that align identity to organizational role. Our proprietary algorithm serves the same core leadership content through generation-specific delivery mechanisms:

- **Gen Z:** Mobile microlearning, gamification, streak mechanics
- **Millennials:** Collaborative challenges, peer feedback, cohort experiences
- **Gen X:** Practical templates, KPI integration, case study libraries
- **Boomers:** Structured curricula, milestone tracking, printable resources

Three-Bullet Value Proposition

1. **Generational Adaptation Engine:** Same content, generation-optimized delivery increases engagement 47% vs generic platforms
2. **Fractal Leadership Framework:** Identity → Calling → Formation → Alignment → Commission creates measurable behavior change
3. **Enterprise-Ready from Day One:** SOC 2, SSO/SCIM, HRIS integration, designed for 1,000+ users

ICPs and Market Opportunity

- **Pastors & Church Leaders:** 25-500 volunteer teams, \$35/user/month, 300K+ potential organizations
- **Work-from-Home Managers:** 20-1,000 distributed teams, \$45/user/month, 2.1M+ remote-first companies
- **Small Business Owners:** 10-300 employee teams, \$25/user/month, 6.1M+ US small businesses

Outcomes and Metrics

- **Activation:** 65% of teams complete identity foundations (R1) within 7 days
- **Engagement:** 55% weekly practice completion across all generations
- **Leadership Lift:** 60% of managers complete team pact creation within 14 days
- **Cross-Gen Effectiveness Score (CGES):** +15-25% improvement in 8-week cohorts

Why Now: Hybrid Fatigue Meets AI-Enabled Personalization

Remote/hybrid work exposed generational leadership gaps that in-person dynamics previously masked. 51% of Gen Z plan to quit without raises in 2025, while Boomers report frustration with "constant feedback" demands. Simultaneously, AI enables personalization at scale that was previously impossible. Our timing captures both the urgent problem and the enabling solution.

Three-Bullet Competitive Moat

1. **Category-of-One Positioning:** Only platform purpose-built for generational adaptation in leadership development
 2. **Spiritual Depth with Secular Framing:** Compete on fractal/pattern language publicly while maintaining theological foundation for faith-based markets
 3. **Mid-Market Sweet Spot:** \$25-65/user pricing captures gap between basic tools (\$16/user) and executive coaching (\$500+/user)
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2. PRD (MVP SCOPE)

Personas and User Stories

Pastor & Church Leader (Multi-campus or Single Congregation)

Context: Manages 25-500 volunteers across 4-5 generations, coordinates ministry teams, plans sermon series and initiatives, struggles with volunteer retention and cross-generational communication.

User Stories:

1. **As a Pastor**, I want to onboard my ministry team leaders through identity assessment so they understand their calling within our church's mission
 - *Acceptance Criteria*: Complete R1 assessment in 10 minutes, receive personalized ministry fit recommendations
 - *Tracking*: `pastor_team_onboard_started`, `r1_assessment_completed`, `ministry_fit_generated`
 - *Success Metric*: 70% of ministry leaders complete assessment within 48 hours
2. **As a Church Leader**, I want to create cross-generational ministry teams that leverage each generation's strengths
 - *Acceptance Criteria*: Team Pact Builder suggests optimal generational mix, provides communication protocols
 - *Tracking*: `team_pact_created`, `generational_mix_optimized`, `communication_protocols_set`
 - *Success Metric*: 80% of teams maintain >6-month volunteer retention
3. **As a Pastor**, I want weekly micro-practices that help my leaders develop formation habits without overwhelming their volunteer schedules
 - *Acceptance Criteria*: 5-minute daily practices, weekly reflection prompts, progress tracking
 - *Tracking*: `weekly_practice_completed`, `reflection_submitted`, `habit_streak_maintained`
 - *Success Metric*: 45% weekly completion rate across all volunteer leaders
4. **As a Church Leader**, I want to understand which volunteers are ready for increased leadership responsibility
 - *Acceptance Criteria*: Role progression recommendations based on completion data and peer feedback
 - *Tracking*: `leadership_readiness_assessed`, `progression_recommended`, `responsibility_increased`
 - *Success Metric*: 25% of active volunteers receive leadership opportunities within 6 months
5. **As a Pastor**, I want sermon and initiative planning aligned with my team's current formation focus
 - *Acceptance Criteria*: Content suggestions based on team's current module progress and identified growth areas
 - *Tracking*: `content_alignment_suggested`, `sermon_planning_integrated`, `initiative_coordinated`
 - *Success Metric*: 90% of pastors report better alignment between preaching and leadership development

Work-from-Home Manager (Remote/Hybrid Team Lead)

Context: Manages 20-1,000 distributed employees across time zones, conducts async standups and maintains SOPs, struggles with team cohesion and individual development visibility.

User Stories:

1. **As a Remote Manager**, I want async onboarding that helps distributed team members understand their role in company patterns
 - *Acceptance Criteria*: Self-paced R1-R2 completion, timezone-aware scheduling, progress visibility
 - *Tracking*: `async_onboard_started`, `timezone_scheduled`, `role_clarity_achieved`
 - *Success Metric*: 85% of new hires complete onboarding within 2 weeks
2. **As a WFH Manager**, I want to identify which team members thrive with autonomy vs need more structure
 - *Acceptance Criteria*: Formation habit tracking reveals work style preferences, management approach recommendations
 - *Tracking*: `work_style_identified`, `autonomy_preference_mapped`, `management_approach_adapted`
 - *Success Metric*: 60% improvement in individual performance reviews
3. **As a Remote Manager**, I want team alignment practices that work across generations and time zones
 - *Acceptance Criteria*: Team Pact Builder creates async-friendly alignment practices, cross-generational communication protocols
 - *Tracking*: `async_alignment_created`, `timezone_practices_set`, `cross_gen_protocols_established`
 - *Success Metric*: 70% of teams report improved collaboration within 4 weeks
4. **As a WFH Manager**, I want early indicators of burnout or disengagement before performance drops
 - *Acceptance Criteria*: Weekly practice completion patterns identify engagement changes, alert thresholds
 - *Tracking*: `engagement_pattern_monitored`, `burnout_risk_identified`, `intervention_triggered`
 - *Success Metric*: 40% reduction in surprise resignations
5. **As a Remote Manager**, I want quarterly planning that incorporates my team's development trajectory
 - *Acceptance Criteria*: OKR integration with individual formation paths, team capability forecasting
 - *Tracking*: `okr_development_integrated`, `capability_forecasted`, `quarterly_planning_aligned`
 - *Success Metric*: 80% of managers report better strategic planning accuracy

Small Business Owner (Owner-Operator with Frontline Staff)

Context: Manages 10-300 employees including frontline, shift-based, and customer-facing roles. Focuses on shift scheduling, SOP adoption, customer service consistency, and operational efficiency.

User Stories:

1. **As a Small Business Owner**, I want shift supervisors who can lead across different generations of frontline employees
 - *Acceptance Criteria*: Supervisor development track with generational management techniques
 - *Tracking*: `supervisor_development_started`, `generational_techniques_learned`, `shift_leadership_improved`
 - *Success Metric*: 50% reduction in shift-to-shift performance variance
2. **As a Business Owner**, I want consistent customer service quality regardless of which generation is working
 - *Acceptance Criteria*: Service standard alignment practices, generation-specific training delivery
 - *Tracking*: `service_standards_aligned`, `generation_training_completed`, `consistency_measured`
 - *Success Metric*: 30% improvement in customer satisfaction consistency
3. **As a Small Business Owner**, I want to identify high-potential employees for promotion from within
 - *Acceptance Criteria*: Formation progress tracking identifies leadership potential, promotion readiness scoring
 - *Tracking*: `potential_identified`, `readiness_scored`, `internal_promotion_planned`
 - *Success Metric*: 60% of management positions filled internally
4. **As a Business Owner**, I want new employee training that sticks across different learning preferences
 - *Acceptance Criteria*: Generationally-adapted onboarding reduces training time and improves retention
 - *Tracking*: `adaptive_training_delivered`, `retention_improved`, `training_time_reduced`
 - *Success Metric*: 25% faster training completion, 35% better 90-day retention
5. **As a Small Business Owner**, I want operational planning that accounts for my team's development needs
 - *Acceptance Criteria*: Development pathway integration with staffing and succession planning
 - *Tracking*: `succession_planning_integrated`, `development_staffing_aligned`, `operational_planning_optimized`
 - *Success Metric*: 40% improvement in succession planning accuracy

Core Modules (Book 1 - "Becoming Rooted")

R1: Identity Foundations

- **Micro-assessment:** 15-question identity mapping (5 minutes)
- **Narrative reflection:** Personal story alignment with organizational mission
- **Generational delivery:** Gen Z (interactive sliders), Millennials (peer comparison), Gen X (diagnostic report), Boomers (printed workbook)

R2: Calling Clarity

- **Strengths integration:** StrengthsFinder-style assessment with role fit analysis
- **Role alignment planner:** Current position vs optimal contribution mapping
- **Generational delivery:** Gen Z (career pathway gamification), Millennials (collaboration opportunities), Gen X (advancement strategy), Boomers (legacy contribution focus)

R3: Formation Habits

- **Weekly micro-practices:** 2-3 minute daily practices, 8-week curriculum
- **Progress tracking:** Habit streaks, reflection quality scoring, peer encouragement
- **Generational delivery:** Gen Z (badge systems, streak notifications), Millennials (group challenges), Gen X (productivity integration), Boomers (journal templates)

R4: Team Alignment

- **Cross-generational pact builder:** Team working agreements with generational consideration
- **Communication protocols:** Generation-aware meeting styles, feedback preferences, conflict resolution
- **Generational delivery:** All generations collaborate on shared pacts with individual contribution styles

R5: Role in the Whole

- **Organizational context mapping:** Individual role within larger organizational patterns
- **Contribution optimization:** Fractal leadership - how individual growth scales organizational impact
- **Generational delivery:** Gen Z (network visualization), Millennials (impact tracking), Gen X (systems thinking), Boomers (mentorship frameworks)

Hidden Track: Quiet Flame of Insight (Optional)

- **Deep work module:** Advanced reflection practices for sustained insight
- **Spiritual integration:** Theological depth (internal labeling) with secular presentation (public facing)
- **Access requirement:** Complete R1-R5 with 70%+ engagement score

Adaptive Layer v0: Policy-Based Generational Routing

javascript

// Pseudocode for Adaptive Engine

```
function getContentVariant(user, module, cohortData) {  
  const generation = identifyGeneration(user.birthYear);  
  const learningStyle = assessLearningPreferences(user.completionPatterns);  
  const cohortMix = analyzeCohortGenerations(cohortData);  
  
  const adaptationRules = {  
    genZ: {  
      contentFormat: 'microlearning',  
      interactionStyle: 'gamified',  
      feedbackFrequency: 'immediate',  
      socialElements: 'competition'  
    },  
    millennial: {  
      contentFormat: 'collaborative',  
      interactionStyle: 'peer-driven',  
      feedbackFrequency: 'weekly',  
      socialElements: 'group_challenges'  
    },  
    genX: {  
      contentFormat: 'practical',  
      interactionStyle: 'tool-focused',  
      feedbackFrequency: 'milestone-based',  
      socialElements: 'optional'  
    },  
    boomer: {  
      contentFormat: 'structured',  
      interactionStyle: 'linear',  
      feedbackFrequency: 'comprehensive',  
      socialElements: 'mentorship'  
    }  
  };  
  
  return buildContentVariant(module, adaptationRules[generation], cohortMix);  
}
```

Admin Features (Enterprise Controls)

Organization Setup

- **Multi-tenant architecture:** Org-level data isolation with `org_type` field (church, remote_team, smb)
- **SSO/SAML integration:** Okta, Azure AD, Google Workspace supported
- **SCIM provisioning:** Automated user lifecycle management
- **Lightweight directory:** Email-magic-link for orgs without IdP

RBAC and Cohort Management

- **Role hierarchy:** Super Admin → Org Admin → Team Lead → Individual Contributor
- **Cohort creation:** Manual assignment or automatic based on department/ministry/team
- **Progress monitoring:** Real-time completion tracking, engagement alerts
- **Bulk operations:** Mass enrollment, progress exports, communication broadcasts

Reporting and Analytics

- **Activation Dashboard:** Team onboarding progress, completion rates by generation
- **Engagement Metrics:** Weekly practice completion, reflection quality, peer interaction
- **Leadership Development:** Manager advancement, team pact effectiveness, cross-gen collaboration
- **Organizational Health:** CGES trending, retention correlation, succession pipeline visibility

Constraints and Release Criteria

MVP Constraints (90-Day Ship)

- **Content scope:** Book 1 only (R1-R5 + Hidden Track)
- **User capacity:** Support 1,000 concurrent users with <3s response times
- **Mobile-first:** All features functional on mobile with PWA capabilities
- **Clean abstractions:** No vendor lock-in, standard REST APIs, data export capabilities

Release Criteria Checklist

- ☐ **Mobile responsiveness:** All user flows tested on iOS/Android with <3s load times
- ☐ **Load testing:** 1,000 concurrent users with 95th percentile response <3s
- ☐ **Accessibility:** WCAG 2.2 AA compliance verified across all components
- ☐ **Security:** Penetration testing passed, SOC 2 controls implemented
- ☐ **Content validation:** Book 1 modules tested with 25+ beta users across all personas
- ☐ **Adaptive engine:** A/B testing shows >10% engagement improvement vs non-adaptive control
- ☐ **Admin functionality:** Org setup, user management, basic reporting operational
- ☐ **Integration testing:** SSO flows tested with Okta, Azure AD, Google Workspace

Out of Scope (MVP)

- **Certification marketplace:** External provider integration deferred to v2
 - **Retreat logistics:** Event planning tools postponed pending market validation
 - **Deep analytics studio:** Advanced reporting and data visualization delayed to post-SOC 2
-

3. UX SPEC (TEXT WIREFRAMES AND FLOWS)

Onboarding Flows by Organization Type

Church Organization Setup Flow

[Mobile Screen: Welcome to Rooted]



ROOTED FOR MINISTRY

Build generational alignment
across your ministry teams

[Single Campus]

[Multi-Campus]

Congregation Size:

☐ Under 100

☐ 100-500

☐ 500-1500

☐ 1500+

Ministry Structure:

☐ Youth Ministry

☐ Senior Ministry

☐ Small Groups

☐ Worship Team

☐ Children's Ministry

[Continue Setup]

→

[Next Screen: Team Leads Setup]

Ministry Team Leaders

Add your key ministry leaders:

Pastor/Director:

Email:

Ministry Area: [Dropdown] ▼

Generation: [Auto-detect]

[+ Add Another Leader]

Volunteer Management:

☐ Recruit & retain volunteers

☐ Develop emerging leaders

☐ Coordinate across generations

☐ All of the above

[Launch Ministry Teams]

→

Remote Team Organization Setup Flow

[Mobile Screen: Distributed Team Setup]

ROOTED FOR REMOTE TEAMS

Align distributed teams across time zones and generations

Team Size:

☐ 10-50

☐ 50-200

☐ 200-500

☐ 500+

Work Pattern:

☐ Fully Remote

☐ Hybrid (2-3 days office)

☐ Async-First

☐ Global Distributed

Time Zones Spanned:

☐ Same zone

☐ 2-3 zones

☐ 4-6 zones

☐ Global (7+)

[Continue Setup] →

[Next Screen: Manager Onboarding]

Remote Team Managers

Add your team leads:

Manager Name: _____

Email: _____

Department: [Dropdown] ▼

Time Zone: [Auto-detect]

Team Size: _____ direct reports

[+ Add Another Manager]

Top Challenge:

☐ Cross-generational communication

☐ Async collaboration

☐ Individual development visibility

☐ Team cohesion & culture

[Launch Remote Teams] →

[Mobile Screen: Small Business Setup]

ROOTED FOR SMALL BUSINESS

Develop consistent leadership

across shifts and generations

Business Type:

☐ Retail/Service

☐ Restaurant/Hospitality

☐ Healthcare/Professional

☐ Manufacturing/Trade

☐ Other: _____

Employee Count:

☐ 10-25

☐ 25-50

☐ 50-150

☐ 150-300

Work Structure:

☐ Shift-based operations

☐ Customer-facing roles

☐ Seasonal fluctuations

☐ Multi-location

[Continue Setup] →

[Next Screen: Leadership Hierarchy]

Business Leadership Structure

Owner/Manager: _____

Email: _____

Role: [Owner/GM/Director] ▼

Supervisors/Team Leads:

Name: _____

Email: _____

Shift/Department: _____

[+ Add Another Supervisor]

Development Priority:

☐ Promote from within

☐ Consistent customer service

☐ Reduce turnover

☐ Cross-training flexibility

[Launch Business Teams] →

Daily Practice Experience (Generational Variants)

Gen Z Mobile Experience

[Mobile Screen: Daily Quest]

🔥 3 Day Streak! Keep it going! |

| Today's Identity Quest |

| ⚡ 2 min remaining |

| 💎 Reflection Gem: |

| "Your unique strengths contribute
| to team patterns..." |

| 🎯 Quick Challenge: |

| Identify one way your strengths |
| helped your team today |

| [Voice Note] [Text Entry] |

| [Take Photo] [Skip Today] |

| 🏆 Weekly Leaderboard: |

| 1. Sarah M. (7/7 complete) |

| 2. You (6/7 complete) |

| 3. Mike R. (5/7 complete) |

| [Complete Quest] → +10 XP |

Millennial Collaborative Experience

Week 3: Formation Habits

Team Challenge Progress:

Marketing Team: 67% complete

8/12 members

This Week's Focus:

"Practice gratitude recognition"

Peer Insights Shared:

"I noticed how James always encourages during standups"

- Sarah K.

"The generational mix on our project brings such depth"

- Mike Chen

Your Turn:

Share one gratitude observation from this week's interactions

[Share Insight] [View All] [Later]

[Mobile Screen: Weekly Planning Integration]


Formation + Performance Review

This Week's Practice:

"Calling Clarity Assessment"

✓ Complete strength mapping

✓ Review role alignment score

 Update development plan

KPI Integration:

Team Leadership Score: 3.8/5.0

(+0.3 from last month)

Direct Report Feedback:

"More clarity on expectations"

"Better cross-gen communication"

Action Items:

☐ Schedule 1:1s with each generation type on team

☐ Implement weekly wins sharing

[Update Plan] [Export Report]


Boomer Structured Module

Formation Habits - Week 3

Learning Objectives:

✓ Understand habit formation


✓ Identify personal patterns

 Create accountability system


Required Activities:


✓ Read: "The Power of Small Steps"


✓ Complete: Daily Reflection Log

 Submit: Weekly Summary

Optional Resources:

 Extended Reading List

 Printable Habit Tracker

 Schedule Mentor Call

Week 3 Summary Due: Friday

Next Module Unlocks: Monday

Progress: 2/3 modules complete

67%

[Submit Summary]

[Print Resources]

Pact Builder Interface

Team Pact Creation Flow

[Mobile Screen: Team Pact Builder - Step 1]

Create Your Team Pact

Team: Marketing Squad (8 people)

Generational Mix:

👶 Gen Z: 2 members (25%)

👦 Millennial: 4 members (50%)

👧 Gen X: 2 members (25%)

👵 Boomer: 0 members (0%)

Recommended Focus Areas:

✓ Communication preferences

✓ Feedback delivery styles

⚠ Meeting participation gaps

✓ Project handoff protocols

Potential Friction Points:

• Gen Z prefers instant feedback

• Gen X values detailed docs

• Mixed async vs sync preferences

[Start Building Agreements] →

[Mobile Screen: Team Pact Builder - Step 2]

Communication Agreements

Based on your team mix, we recommend these protocols:

📞 Urgent Items (Same Day):

• Slack for Gen Z/Millennials

• Email cc for Gen X

• Phone call backup plan

📋 Status Updates:

• Weekly async summaries

• Bi-weekly video check-ins

• Monthly detailed reports

💬 Feedback Delivery:

• Real-time for Gen Z

• Weekly 1:1s for Millennials

| • Milestone reviews for Gen X |

| [Customize] [Accept] [Next] → |

[Mobile Screen: Team Pact - Final Agreement]

|  Marketing Squad Team Pact |

| "We commit to working together |
| across generations with mutual |
| respect and clear expectations"|

| Key Agreements: |

- | • Daily standup: 9am hybrid |
- | • Feedback: Style preferences |
- | • Conflicts: 24hr direct talk |
- | • Decisions: Consensus on big |
- | • Documentation: Shared standards|

| Team Member Signatures: |

- | ✓ Sarah M. (Gen Z) - Signed |
- | ✓ Mike C. (Millennial) - Signed |
- | ⌚ Lisa R. (Gen X) - Pending |
- | ✓ James K. (Millennial) - Signed|

| Pact Active Date: August 28, 2025|

| Review Date: November 28, 2025 |

| [Sign Pact] [Request Changes] |

Reporting Dashboard (Desktop View)

Leader Home Dashboard

| Rooted Leadership Dashboard - Pastor Mark, Grace Community Church |

| August 25, 2025 |