Remidi Works Commercial Health Rapid Scan - Standard Specification v1.0

Overview

This document codifies the standard approach for creating Remidi Works rapid commercial assessments. These assessments serve as lead generation tools for portfolio company outreach, demonstrating expertise through public data analysis before requesting internal metrics.

Current Status: Free tier (no internal data required)
Use Case: Cold outreach to PE operating partners and portfolio company CEOs
Goal: Drive 30-min expert kickoff call bookings
Format: 3-page standalone HTML file

Assessment Structure

Page 1: Dashboard (Executive Summary)

Header Section:

- Remidi Works branding (RW badge + logo area)
- Company name (large, prominent)
- Company metadata (industry, location, size metrics)
- Subtitle: "Commercial Health Assessment" or "Rapid Commercial Scan"

Score Banner:

- Overall Commercial Maturity Score™ (0-100 scale)
- Segment benchmark comparison (e.g., "Workforce mgmt. benchmark: 5.8")
- Status badge: "⏳ Pending expert review" (creates urgency)

Dimension Cards Grid (5 dimensions):

Each card contains:

1. **Dimension name** (uppercase, small caps)
2. **Tier badge** (T1 Low / T2 Medium / T3 High)
3. **Score** (0-100, large number with color coding)
4. **Benchmark metadata** (Peer average | Top 25% threshold)
5. **Confidence toggle** (▶ See confidence basis - expandable dropdown)

Five Core Dimensions:

1. Value Articulation (25% weight)

2. Pricing Architecture (25% weight)

3. Competitive Positioning (30% weight)

4. Sales Enablement (15% weight)

5. Customer ROI Proof (20% weight)

Confidence Basis Dropdown Structure:

When expanded, shows:

- **Data Confidence Score:** X/10 (based on data availability)

- **Based on:** (3-4 bullet points with ✓ icons)

    - Public data sources actually analyzed

    - Specific observations made

    - Confidence level indicators

- **Need from you (kickoff call):** (3-4 bullet points with ? icons)

    - Specific internal metrics required

    - Questions to validate hypotheses

    - Data that would increase confidence

- **Improvement Note:** (green box)

    - How score improves with internal data

    - Expected impact range with validation

    - Industry benchmark context

Critical Gap Callout:

- Red/orange alert box below dimension grid

- Highlights single highest-priority opportunity

- Uses specific index (e.g., "Category Leadership Opportunity," "CFO-Ready Index™ ")

- Quantifies potential impact

- Creates urgency without solving the problem

Expert Kickoff CTA:

- Dark background box

- 💡 icon + "Expert Calibration Session"

- "30 minutes • Complimentary"
- Brief value prop for the call
- "Schedule Call" button (email mailto link)

Page 2: Key Findings (Detailed Analysis)

Format: 3 finding cards, ranked by priority

Finding Card Structure:

1. **Header:**
   - Icon + Dimension name (e.g., 🎯 Competitive Positioning)
   - Priority badge (HIGH/MEDIUM priority)

2. **Score Line:**
   - "Score: X/100 • Weight: X% • Impact: [business outcomes]"

3. **What We Observed:** (Blue box)
   - Label: "WHAT WE OBSERVED"
   - 3-5 sentences of specific observations
   - Evidence-based (cite website, G2, pricing page, etc.)
   - Diagnostic, not prescriptive
   - Quantify where possible (e.g., "8 case studies found, none with ROI")

4. **Strategic Direction:** (Green box)
   - Label: "STRATEGIC DIRECTION"
   - 3-5 sentences of high-level recommendations
   - References industry benchmarks
   - Quantifies potential impact ranges
   - Directional, not tactical (no playbook details)

5. **Unlock Note:** (Yellow box)
   - 🔒 icon
   - "Unlock full diagnostic:" preview of what paid tier includes
   - Specific deliverables (e.g., "positioning playbook," "ROI calculator")

Finding Selection Criteria:

Primary Finding (Hero):

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- Highest strategic leverage
- Most defensible with public data
- Creates "aha moment" of insight
- Typically: Competitive Positioning or Pricing Architecture

Secondary Findings (2):

- Support primary finding
- Different dimensions for comprehensive view
- Mix of quick wins and strategic initiatives
- Typically: Value Articulation + Sales Enablement or Customer ROI

What NOT to Include:

- Tactical implementation steps
- Specific copy/messaging examples
- Detailed pricing models
- Spreadsheet-level analysis
- Anything that solves the problem completely

Page 3: Next Steps (Journey Map)

Platform Intro Banner:

- Gradient background (orange)
- "How Remidi Works Helps"
- Value proposition (one paragraph)
- Bridges insight → action

Journey Steps (3 steps):

Step 1: Expert Kickoff Call

- Duration: 30 minutes • Complimentary
- Description: Calibrate findings, validate hypotheses, prioritize
- Deliverables:

- Calibrated scores with confidence intervals
- Prioritized opportunity list (impact × effort)
- Recommended diagnostic scope

Step 2: Full Commercial Diagnostic

- Duration: 2 weeks • Pilot program available
- Description: Internal data integration, peer benchmarking, implementation roadmap
- Deliverables:
  - Detailed findings with evidence
  - Peer benchmark data (pricing, retention, efficiency)
  - 30/60/90-day implementation playbook
  - ROI model by dimension
  - Platform access

Step 3: Ongoing Platform Access

- Duration: Quarterly updates • Continuous benchmarking
- Description: Real-time tracking, updated benchmarks, AI recommendations
- Deliverables:
  - Dashboard tracking commercial health
  - Quarterly benchmark updates
  - AI Coach recommendations
  - Expert advisory hours
  - Collaborative workspace

Final CTA Section:

- Dark background
- "Ready to Unlock the Full Diagnostic?"
- Brief description of kickoff call value
- Two buttons:
  - Primary: "Schedule Expert Kickoff" (email)
  - Secondary: "Learn More About Platform" (remidiworks.com)

Footer:

- Remidi Works branding (linked to website)
- Methodology note: "Commercial Health Scoring Model™ "
- Copyright: HG Partners

Scoring Methodology

Overall Commercial Maturity Score™ Calculation

Formula:

Overall Score = Σ(Dimension Score × Weight)

Weights:
- Value Articulation: 25%
- Pricing Architecture: 25%
- Competitive Positioning: 30%
- Sales Enablement: 15%
- Customer ROI Proof: 20%

Dimension Scoring Framework (0-100)

Tier 1 (Low): 0-45

- Major gaps visible in public data
- Industry best practices not evident
- Significant risk or missed opportunity
- Color: Red (🔴 #dc2626)

Tier 2 (Medium): 46-65

- Some capabilities present
- Mixed signals from public data
- Moderate optimization opportunity
- Color: Orange (🟠 #f59e0b)

Tier 3 (High): 66-100

- Strong public indicators
- Industry best practices evident
- Incremental optimization only

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- Color: Blue (#3b82f6)

Evidence Sources (Public Data Only)

Primary Sources:

- Company website (homepage, pricing, about, case studies)
- G2/Capterra/TrustRadius reviews (sentiment, feature mentions, complaints)
- LinkedIn (team size, recent hires, job postings)
- Crunchbase/PitchBook (funding, investors, growth stage)
- Competitor comparison grids
- Public pricing intelligence (Vendr, OpenView data)

Secondary Sources:

- Industry reports (Gartner, Forrester positioning)
- News/PR announcements
- Podcast interviews with founders/executives
- Conference presentations
- Social media presence

What's NOT Used (Free Tier):

- Internal metrics (NRR, CAC, win rates)
- CRM/sales data
- Customer interviews
- Proprietary benchmarks
- Financial statements

Data Confidence Scoring

Confidence Scale (0-10):

9-10: Near-complete picture

- Multiple primary sources corroborate
- Recent data available
- Clear evidence of capability or gap

7-8: Strong confidence

- 2+ primary sources confirm

- Some inference required

- Directionally accurate

5-6: Moderate confidence

- Limited public visibility

- Inference from indirect signals

- Requires validation in kickoff

3-4: Low confidence

- Minimal public data

- High uncertainty

- Critical to get in kickoff call

0-2: Speculation

- No credible public data

- Should not score without internal data

Confidence Basis Content Standards

"Based on:" Section (Green ✓):

- Be specific about source (not just "website review")

- Quantify where possible ("8 case studies analyzed")

- Note what you actually observed ("no public pricing visible")

- Show methodology credibility

"Need from you:" Section (Red ?):

- Ask for specific metrics, not general "data"

- Frame as validation, not investigation

- Show expertise through what you're asking for

- Create urgency (these answers change the score)

"Improvement Note:" Section:

- Show score increase range with data (e.g., "5.5-6.2")

- Quantify business impact potential

- Reference industry benchmarks

- Make kickoff call valuable and urgent

Design Standards

Visual Design Principles

Color Palette:

- Primary brand: Orange (⬛ #f97316)

- Navy: (⬛ #1e293b) / (⬛ #334155)

- Backgrounds: (⬜ #f8fafc)

- Success/Green: (🟩 #10b981)

- Warning/Yellow: (🟨 #fde047)

- Alert/Red: (🟥 #dc2626)

Typography:

- Font: System fonts (-apple-system, Segoe UI, Roboto)

- Score numbers: 5em (dashboard), 3em (cards)

- Dimension labels: 0.85em, uppercase, letter-spaced

- Body text: 0.9-1em, line-height 1.6

Layout:

- Max width: 1000px

- Padding: 40px

- Card spacing: 20-25px gaps

- Border radius: 8-12px

- Subtle shadows on cards

Interactive Elements

Confidence Toggle:

- Button style (not link)

- Button style (hot link)
- Arrow rotation animation (90deg)
- Smooth expansion (300ms ease-out)
- Max-height transition for smooth reveal

Hover States:

- Dimension cards: border color darkens
- Buttons: background darkens
- Links: underline on hover

Responsive Design:

- Mobile: Single column layout
- Tablet: 2-column dimension grid
- Desktop: Auto-fit grid (3 columns max)

Content Guidelines

Tone & Voice

DO:

- Be direct and data-driven ("Score: 42/100")
- Quantify observations ("8 case studies, none with ROI")
- Use industry terminology correctly
- Show expertise through what you ask for
- Create urgency through opportunity cost
- Reference benchmarks and ranges

DON'T:

- Use consultant-speak or jargon
- Be overly formal or academic
- Apologize for limitations
- Make unsubstantiated claims
- Overpromise on free tier
- Sound like a sales pitch

Writing Standards

Observations (What We Observed):

- Start with the evidence: "Website messaging positions as..."
- Be specific: Not "weak positioning," but "all-in-one claim shared with 20+ competitors"
- Quantify: "15+ testimonials, 2 with quantified outcomes"
- Cite sources implicitly: "G2 reviews mention..."
- Neutral diagnostic tone, not judgmental

Recommendations (Strategic Direction):

- Lead with the shift: "Move from X to Y"
- Reference industry best practices: "Category creators command 30-40% premiums"
- Quantify impact ranges: "15-25 percentage point improvement"
- Stay strategic, not tactical: Frameworks, not templates
- Show expertise without solving

Unlock Notes:

- Be specific about deliverables: "positioning playbook" not "recommendations"
- Create tangible value perception
- Reference tools and frameworks by name
- Imply depth without revealing content

Production Process

Research Phase (60-90 min per company)

1. **Company intelligence gathering** (20 min)
   - Website deep-dive (all main pages)
   - G2/Capterra reviews (read 30-50 recent)
   - LinkedIn scrape (team, hiring, updates)
   - News/press search
2. **Competitive context** (15 min)

- Identify 3-5 direct competitors

- Compare positioning, pricing, messaging

- Check comparison grids on review sites

3. **Dimension scoring** (30 min)

- Score each dimension (0-100)

- Document evidence for each score

- Note confidence level (0-10)

- Identify data gaps

4. **Finding synthesis** (20 min)

- Select hero finding (highest impact)

- Choose 2 supporting findings

- Draft observations and directions

- Write confidence basis content

HTML Generation (30 min)

1. Copy standard template

2. Update company metadata

3. Fill in dimension scores and confidence basis

4. Write 3 finding cards

5. Customize critical gap callout

6. Update all email/link CTAs

Quality Checks

Accuracy:

- All scores have evidence citations in confidence basis

- Benchmark comparisons are realistic

- No unsubstantiated quantitative claims

Credibility:

- Asks for metrics that actually exist and are measurable

- Industry benchmarks are real (not made up)

- Terminology is used correctly

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Persuasiveness:

- Creates "aha moment" - something they didn't know

- Shows expertise - asks smart questions

- Builds urgency - quantifies opportunity cost

- Avoids solving - leaves them wanting more

Technical:

- All links work (mailto, website URLs)

- Mobile responsive

- Confidence dropdowns function

- No broken formatting

Variation by Industry/Segment

For Established Companies (>$10M ARR)

- Emphasize efficiency and optimization

- Focus on competitive differentiation

- Highlight category leadership opportunities

- Use phrases like "scale-stage" and "market position"

For Growth Stage (<$10M ARR)

- Emphasize fundamentals and best practices

- Focus on building commercial infrastructure

- Highlight foundational gaps

- Use phrases like "early traction" and "establishing position"

For Horizontal Platforms

- Competitive positioning is usually hero finding

- Emphasize category ownership

- Focus on differentiation vs. commoditization

For Vertical SaaS

- Value articulation often strongest
- Pricing architecture usually has opportunities
- Focus on industry-specific outcomes

Common Pitfalls to Avoid

❌ Giving Away the Solution

- Don't provide specific messaging copy
- Don't build their pricing model
- Don't write their positioning statement
- Don't create their ROI calculator

❌ Being Too Generic

- Don't use "improve messaging" without specifics
- Don't cite generic benchmarks ("industry average")
- Don't make vague recommendations

❌ Overstepping Confidence

- Don't score dimensions with <4 data confidence
- Don't make claims unsupported by public evidence
- Don't extrapolate beyond what data shows

❌ Poor Urgency Creation

- Don't make kickoff call sound optional
- Don't fail to quantify opportunity cost
- Don't make it seem like you've told them everything

❌ Technical Issues

- Don't use broken email links
- Don't forget to update company name everywhere
- Don't leave template placeholder text

File Naming & Deployment

Local Filename: CompanyName_Commercial_Scan.html

Vercel Deployment:

```
/public
  /companyname
    index.html
```

URL Structure: athena-demo-six.vercel.app/companyname

Email Subject: "[CompanyName] - Commercial Health Scan"

Email Body Template:

[Name] -

Ran a quick commercial health scan on [CompanyName] using public data.

Identified some interesting opportunities around [primary finding]
and [secondary finding].

Takes 3 minutes to review: [URL]

Worth a 30-minute calibration call to validate these with your
internal metrics?

Best,
Michael

Success Metrics

Quality Indicators:

- Scan creates "I didn't know that" reaction
- Recipient books kickoff call within 48 hours
- Questions asked show they read carefully
- They forward to colleagues/investors

Failure Indicators:

- No response after 1 week

- Recipient asks for "more detail" without booking call

- Feedback that it's "too generic" or "could get from ChatGPT"

- Asks for deliverables without paying

Version History

v1.0 (January 2026)

- Initial codification based on NowSecure and Fingercheck examples

- 3-page format established

- 5-dimension framework finalized

- Confidence basis dropdowns implemented

Future Enhancements Under Consideration:

- Interactive scoring (user inputs data, gets instant score)

- Company-specific benchmark data

- Automated generation from URL

- Video walkthrough companion

- Gated access (email required)

Document Owner: Michael Himmelfarb, Remidi Works
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Status: Living document - update as methodology evolves