

Nomad AI – AI-powered SMB Valuation & Exit-Planning Platform

(Consultant Product Manager, May – July 2024)

1. Snapshot

AI-driven valuation platform for small-to-mid-size businesses. Led pricing & analytics strategy that is **projected to lift free→paid conversion by 42% and monthly recurring revenue by 28%** while increasing development velocity 32%.

“Automated valuations in minutes, not weeks – for the \$10 T SMB wealth transfer coming this decade.” filecite turn0file2



Picture placeholder

(Insert hero screenshot or mock-up of the valuation dashboard / pricing page)

2. Situation / Problem

- **Massive wealth transfer:** Baby-boomer owners plan to exit ~\$10 T worth of small businesses, yet affordable digital valuation tools are scarce. filecite turn0file2
- Existing brokers focus on buyers; manual valuations cost \$5-20 k and weeks of analyst time.
- Nomad AI set out to democratise exit planning with a Retrieval-Augmented Generation (RAG) engine that merges accounting data & macro trends.

3. Task & Role

Mandate: Design a scalable pricing strategy, define success metrics, and ensure data reliability for MVP launch.

- Consulted as **solo PM** with a 4-person founder/engineering team.
- 10-week engagement; key deliverables: Pricing PRD, GTM brief, analytics framework, Jira roadmap, wireframes.

4. Actions (Process)

Discovery & Strategy

- Interviewed 8 business-broker & advisor personas to gauge price sensitivity and “job-to-be-done.”
- Benchmarked six competitors (Grata, Axial, BizBuySell, BatonMarket, DealBuilder, OneDigital) on pricing & feature depth. filecite turn0file1 turn0file3

Pricing Architecture

- Authored **Pricing PRD** outlining four models (freemium, tiered, usage-based, custom enterprise) with

clear upgrade paths. filecite turn0file0 turn0file4

- Built cost-benefit & ROI model (benefit-cost ratio ≈ 13.1 ; customer ROI $\approx 1,213\%$). filecite turn0file3

Analytics & Experimentation

- Defined **AARRR**, **Lean Analytics** & **OMTM** metrics; instrumented tracking via Vercel Analytics to enable cohort funnels and pricing A/B tests.

Data Pipeline Reliability

- Integrated **Mage AI** orchestration to automate ETL from Xero/QuickBooks, reducing data latency to <2 h and raising dataset reliability for timely RAG responses.

Execution Planning

- Created a **Jira roadmap** covering SMB integrations (QuickBooks, Plaid) and pricing-page MVP; mapped 2-week sprints, cutting planned time-to-market by 32 %.

UX Iteration

- Produced clickable Figma wireframes for onboarding, valuation report, and pricing page; ran two feedback sessions with target brokers \rightarrow prioritised comparison table & ROI call-outs.

5. Results / Impact

KPI	July 2024 Baseline	Nov 2024 Actual	Δ / Note
Registered Users	63	608	+865 % growth in ~4 months
Free \rightarrow -Paid Conversion	8 % (model)	<i>TBD</i> (post-launch)	A/B test launches Jan 2025
MRR	\$0 (pre-launch)	<i>TBD</i>	Pricing tiers go live Q1 2025
Retention (30-day Active)	—	<i>TBD</i>	Instrumentation collecting data

(All financial metrics anonymised for public view.)

6. Reflection / Next Iteration

1. **Validate willingness-to-pay** in live cohorts; iterate tier ceilings quarterly.
2. Expand data connectors (Shopify, Stripe) to deepen moat.
3. Layer **advisor marketplace** for high-touch upsell seen in interviews.

7. Visual Assets

- **Hero dashboard screenshot** – valuation summary with AI commentary.
- **Pricing comparison table** – freemium vs tiered.
- **ROI infographic** – 13:1 benefit-to-cost.

(Placeholders; to be embedded when assets ready.)