

## InVision Learning

**Document Type:** Business Plan

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### Core Competencies Demonstrated:

- **Business Strategy & GTM:** Co-authored a business plan defining the AI-VR product, target market (Healthcare, Corporate), and go-to-market strategy.
- **Market & Competitor Analysis:** Conducted a detailed analysis of market size (\$17.9B), demand drivers, barriers to adoption (e.g., cost, content), and key competitors (e.g., Coursera, Labster).
- **Financial Modeling:** Developed a 4-year financial projection detailing revenue streams (subscription, consulting), operating expenses, and a full breakeven analysis for Year 2.
- **Phased Action Planning:** Designed a 3-phase action plan with a Gantt chart, detailing specific technical and non-technical tasks, durations, and risk mitigations for each phase.



*InVision Learning*

**Final Business Plan**

**Roneil Kumar & Peter Trujillo**

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# Executive Summary/Purpose

Our current educational and training methodologies are limited by the lack of immersive, interactive, and realistic environments that can effectively prepare individuals for real-world scenarios. This gap is especially apparent in the healthcare industry, where hands-on experience is crucial. Traditional training methods often fall short of delivering the depth of understanding and practical skills required, leading to inefficient learning processes and increased costs. Additionally, the need for accessible and remote training solutions has become more urgent, accelerated by global events and technological advancements.

To address these challenges, we introduce InVision Learning, a learning solution that integrates cutting-edge artificial intelligence (AI) with virtual reality (VR) technology. This innovative approach not only creates realistic and interactive training environments but also features the Expert Experience Simulator, allowing users to design custom simulations tailored to specific needs. By utilizing real-world data, such as video footage and documentation, our solution enhances the learning experience, accelerates skill acquisition, and improves return on investment (ROI). InVision Learning offers a subscription-based model with various tiers, including individual, team, enterprise, and academic options. This model ensures continuous updates to the AI algorithm and provides clients with scalable solutions to meet their training needs.

InVision Learning's action plan for roll out is divided into phases, with the initial phase dedicated to product development and gathering success stories from pilot clients. The subsequent phase involves a robust marketing campaign that includes testimonials and data from the initial phase to attract more clients.

InVision Learning is poised for a promising future, leveraging strategic investments and a strong foundation built over the years. Key growth strategies include retaining the Subscription base, sublicensing deals, and exploring new markets, with significant revenue growth anticipated. Despite a 3% cost increase due to inflation, strong profit margins are expected, and the company aims for profitability by Year 3, with plans to reinvest profits into new solutions and expansions by Year 4. Over the next five years, the program aims to scale by meeting key milestones in market penetration and revenue generation. At its peak, the program will seek strategic partnerships and acquisition opportunities with major educational technology firms or VR companies to maximize profitability and ensure continued innovation in virtual reality education.

## Background

### VR Education - Solution

Virtual reality (VR) is a technology that creates immersive, interactive, and realistic environments for learning and training purposes. VR education has been implemented in various sectors, such as business, education, health care, and the military. VR education provides learners with several key benefits: it mimics real-world environments, accelerates the learning process, supports the brain's natural learning process, enables remote learning, and improves accessibility, all while reducing costs.

Our proposed solution is designed to revolutionize training in the field of healthcare through the integration of cutting-edge AI learning + virtual reality technology. What distinguishes our solution from others is our

‘Expert Experience Simulator’ feature. ‘Expert Experience Simulator’ empowers users to create custom simulations using our proprietary AI algorithm.

For example, in the healthcare industry, by utilizing video footage of surgeries and medical documentation text, users can generate accurate and detailed simulations for specific medical procedures.

This immersive approach will allow learners to practice and hone their skills in a safe and controlled environment. Our VR training solution is designed to be compatible with the most common VR hardware available on the market, ensuring accessibility and reducing investment barriers.

## Current Market Use Cases

VR Education can transform how we learn and train students and employees. VR can provide students with immersive and captivating learning experiences that spark their curiosity and interest. For example, VR can transport students to historical sites, distant planets, or fictional worlds and allow them to interact with the environment and the characters ([FasterCapital](#), 2024). VR education offers a myriad of benefits and applications across various industries:

**Healthcare:** VR can significantly enhance medical training and education by simulating realistic scenarios and procedures, such as surgeries, diagnoses, or emergency responses. It can also improve patient care through immersive therapies, rehabilitation, and pain management. In fact, Imperial College London used VR technology in training, and students reported high levels of satisfaction, with 91% of students enjoying it, 95% feeling engaged, and 99% feeling the teaching met their learning requirements. ([Gartner](#), 2024)

**Academia/Education:** VR enhances student and teacher engagement and educational outcomes by creating immersive, interactive learning environments for subjects such as science, history, or art. It also promotes accessibility and diversity in education by enabling collaborative and remote learning across different locations and cultures. In a limited program within Japanese high school programs, VR students reported a 98.5% satisfaction rate with their experience ([Emarketer](#), 2024).

Examples of VR-based training applications in various contexts include:

- **Remote work:** VR supports remote collaboration and communication among employees, managers, and clients by creating virtual meeting spaces where participants can interact and share information regardless of physical location ([SB animation](#), 2024).
- **High-cost work:** VR makes training more cost-effective in fields with expensive or rare resources, including surgery,
- **Interpersonal/Soft skills:** VR helps develop communication, leadership, teamwork, empathy, and creativity by placing learners in realistic social interactions with virtual characters.
- **Technical skills:** VR offers hands-on activities to acquire expertise in coding, design, and repair through interactive exercises involving virtual objects and problem-solving tasks.
- **Physical skills:** VR supports learning and practicing sports, fitness, and dance by providing immersive, engaging experiences that encourage physical movement and competitive participation.

## Opportunity

The VR education market is a fast-growing and lucrative sector, with a global market size of \$17.9 billion in 2019, according to Grand View Research. The market is expected to grow at a compound annual growth rate (CAGR) of 18.2% from 2020 to 2032, reaching \$184.8 billion by 2032. While the demand for VR as a whole has slowed in 2024, it still experienced a 6% growth rate, outpacing smartwatches, Voice Assistants, and smart home segments ([Emarketer](#), 2024).

## Sectors

### Fastest Growing Sectors:

- **Corporate Training:** This sector is experiencing significant growth due to its immediate applicability to job-specific skills, workplace relevance, return on investment, and flexibility. Corporations can rapidly deploy and scale new training technologies, making VR particularly attractive for this sector (Fortune, education, 2024).
- **Higher Education:** The adoption of VR in higher education is growing rapidly, especially for fields that require hands-on experience or visualization of complex concepts (Fortune, education; Business. 2024).
- **Healthcare Education:** The healthcare industry is seeing substantial growth in VR adoption for medical training, surgical simulations, and patient care systems (Fortune, 2024).

### Slower Growing Sectors:

- **K-12 Education:** While there is growth in this sector, it faces more bureaucratic and budgetary constraints compared to corporate training, which can limit VR adoption (Fortune, education. 2024).
- **Public Institutions:** Like K-12, public institutions often face budget limitations and slower adoption rates for new technologies.
- **Consumer VR for Education:** While the overall VR market has slowed in 2024 with a 6% growth rate, it's still outpacing other tech segments like smartwatches and smart home devices (LinkedIn Pulse, 2024).



Figure 1 – VR Market (Software testing help, 2024)

## Demand

The main factors that are driving the demand for VR education are:

- The need for effective and engaging learning and training solutions in various domains, such as business, education, health care, military, and entertainment.
- The benefits of VR education include enhanced learning outcomes, reduced costs, increased safety, and improved accessibility and scalability ([SB animation](#), 2024).
- The impact of the COVID-19 pandemic has accelerated the adoption of VR education as a means of coping with remote work, social distancing, and travel restrictions.

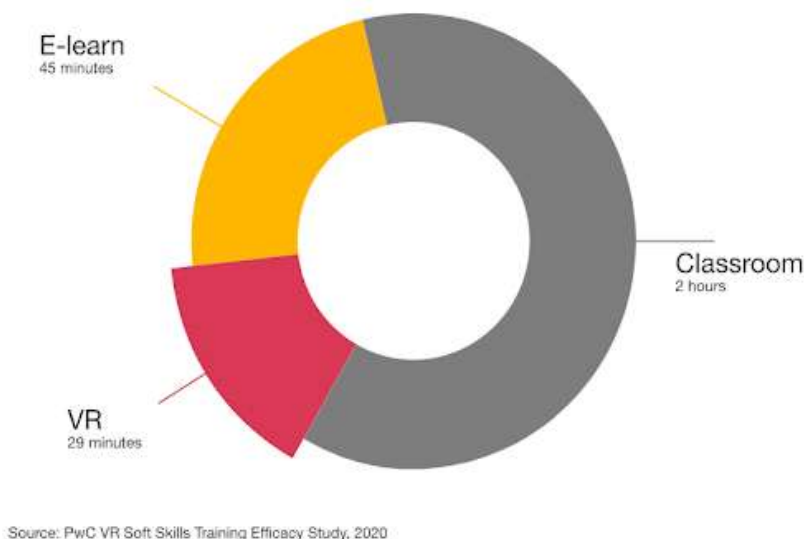


Figure 2– Time to Complete Training (PIXO VR, 2024)

The supply of VR education is also increasing as more hardware and software providers, content creators, and service providers are entering the market. It is projected that there will be over 180M VR/AR users by 2027 ([Emarketer](#), 2024).

**Academics:** The academic segment accounted for the largest market share in 2019, followed by the corporate segment. The academic segment includes VR education for K-12, higher education, and vocational training. The academic segment is expected to grow at a faster rate than the corporate segment due to the increasing demand for VR education in schools and colleges. However, per Pitchbook investment analysis, business-oriented VR training is on the rise ([Pitchbook](#), 2024). Per [Emarketer](#), South Korea's science ministry plans to invest **223.7 billion won (\$166 million)** in metaverse ecosystem development, including a “Metaverse Academy” to cultivate young field experts ([Emarketer](#), 2024). 2024).

The K-12 segment accounted for the largest market share in 2019, followed by higher education and vocational training segments. The K-12 segment includes VR education for primary and secondary education. According to [Nikkei Asia](#), South Korea's Pohang University of Science and Technology (POSTECH) is becoming a “metaverse” and has invested \$500,000 in metaverse-related classrooms. The higher education segment includes VR education for undergraduate and postgraduate education. The

vocational training segment includes VR education for professional and technical training (Nikkei Asia, 2024).

**Medicine:** In a study published in 2021, a team from China led by Zhou created a VR experimental simulation for medical students. This simulation not only allowed students to explore and learn about anatomy, but it also allowed for repeated practice compared to the single opportunity when using cadavers for education. This repeated practice can increase students' confidence in their skills and can result in higher success rates when performing procedures on real patients. Students who used VR for an experimental course had higher scores on average compared to their classmates who participated in traditional experimental courses. The increased hands-on simulation was much more preferred compared to their classmates with fewer hands-on opportunities.

**Geographics:** North America accounted for the largest market share in 2019, followed by Europe and Asia Pacific. North America is the leading region for VR education due to the high adoption of VR technology, the presence of major hardware and software providers, and the large spending on education and training. Europe is the second-largest region for VR education due to the growing demand for VR education in various sectors, such as education, health care, and entertainment. Asia Pacific is the fastest-growing region for VR education due to the rapid development of VR technology, the increasing population and urbanization, and the rising awareness and interest in VR education.

## Barriers

The VR education market is also faced with various challenges and risks that are hindering its growth and development. Some of the main barriers are:

**Technical limitations:** The VR education market is limited by the technical constraints and drawbacks of VR technology, such as high cost ([FasterCapital](#), 2024), low availability, heavy weight, limited battery life, and motion sickness. These limitations affect the accessibility, usability, and comfort of VR education, making it less affordable, convenient, and enjoyable for the users. With hardware cost reductions and innovations, these barriers may be less impactful over time ([IBISWorld](#), 2024). Moreover, the technical limitations of VR technology also affect the quality and reliability of VR education, making it prone to errors, glitches, and failures that can disrupt the learning and training process and outcomes ([EdTech Magazine](#), 2019).

**Regulatory issues:** The VR education market is subject to the regulatory policies and laws of different countries and regions, which can affect the legality, security, and privacy of VR education. Regulatory issues can pose legal and ethical challenges and dilemmas for VR education, such as intellectual property rights, data protection, consent, and liability. Regulatory issues can also create uncertainty and inconsistency for VR education, as different jurisdictions may have conflicting rules and regulations. Furthermore, regulatory issues can also create barriers and obstacles to VR education, as some jurisdictions may have strict or prohibitive rules/regulations that can limit or prevent its adoption and implementation.



**Market competition:** The VR education market is characterized by an elevated level of market competition, as more hardware and software providers, content creators, and service providers are entering and competing in the market. Market competition can create challenges and threats for VR education, such as price wars, product differentiation, customer loyalty, and market share. Market competition can also create opportunities and benefits for VR education, such as innovation, collaboration, and customer satisfaction. However, market competition can also lead to fragmentation and duplication of the VR education market, as different providers may offer similar or incompatible products and services, which can confuse and frustrate the users and reduce the efficiency and effectiveness of VR education.



Figure 3 – VR Stats You Must Know (FinancesOnline,2024)

## Competitors

The VR education market is composed of various players and competitors who offer assorted products and services for VR education. The VR education market is growing rapidly as more learners and educators seek to harness the potential of immersive and interactive learning. VR education can offer benefits such as enhanced engagement, retention, and motivation, as well as reduced costs, barriers, and risks. The VR education space is highly competitive, with well-established companies having a strong foothold in the industry from both consumer and commercial perspectives. Additionally, numerous new startups are entering the market, backed by investor funding; these companies include:

### VR Education - Market Leaders (IBISWorld, 2024):

- **Coursera:** A US-based online learning platform that offers a variety of online courses, degrees, and certificates from leading universities and organizations.

- **Labster:** A Danish company that develops and provides VR simulations and labs for science education. Labster offers a catalog of over 100 VR simulations and labs covering topics such as biology, chemistry, physics, and engineering.
- **Discovery VR:** A US-based media company that produces and provides VR content and experiences for education, including a library.

### **VR Education– Startups (PitchBook, 2024):**

- **Moonhub:** A provider of immersive learning solutions for enterprises and education institutions for various industries, such as construction, healthcare, and hospitality. Total funds raised to date **\$4.85M**.
- **LinkVIC:** A developer of a virtual reality platform for surgical training and assessment. LinkVIC simulates various surgical procedures and provides real-time feedback and guidance to trainees and instructors. Total funds raised to date **\$1.43M**.
- **Reverto:** A creator of a virtual reality system for treating phobias and anxiety disorders. Last investor deal **\$1.29M**
- **OramaVR** enables medical students and professionals to have collaborative and interactive learning experiences. The platform supports multiple modalities, such as surgery, trauma, emergency, and anesthesia, and offers realistic and customizable scenarios. Their total funds raised to date is **\$0.68M**.

## **Product Description**

InVision Learning is a software service designed to train medical professionals with high-stakes skills virtually. Users can utilize the ‘Expert Experience Simulator’ feature to artificially generate custom learning simulations to develop personalized, virtual learning scenarios. This unique product can reduce time to proficiency and costs associated with training and upskilling medical professionals such as doctors, surgeons, and beyond. InVision Learning is built on a proprietary AI model that is trained on thousands of hours of video footage from healthcare procedures and processes. Additionally, our AI model is trained on the following vital data as well:

- **Clinical Guidelines and Protocols:** Standardized guidelines that outline best practices for performing various medical procedures.
- **Medical Textbooks and Journals:** Comprehensive resources that provide in-depth information on procedures, techniques, and case studies.
- **Training Manuals and Simulation Guides:** Materials used in medical training programs to teach and practice procedures.

The model then leverages deep learning and neural networks to learn proper healthcare techniques; as it is fed more data, the model becomes more accurate, efficient, and knowledgeable. The deep learning framework serves as the foundation for generating content that can be leveraged for VR training. Our product will be offered to healthcare institutions that need robust training for their professionals but don’t want the risks associated with damaging expensive equipment or harming patients. InVision Learning is compatible with a wide range of VR headsets on the market today, increasing hardware options for customers.

## Additional Product and Operational Details

### Staff

To make InVision Learning a reality we plan for the following staff/talent structure:

- **Machine Learning Developers:** These developers have experience in machine learning systems, particularly with machine vision with videos and large language models.
- **VR Developers:** Skilled professionals who can help create, train, and quality-check virtual settings and scenarios, which are the backbone of experiential learning.
- **Instructional Designers:** Skilled professionals who help create, train, and ensure optimal learning experiences by identifying proper tasks and job analysis, learning objectives, activities, and assessments.
- **VR UX designers:** These specialists will help ensure the visual design elements for generated content appeal to users and support the learning experience.
- **Sales team:** These professionals are instrumental in finding clients who can benefit from what InVision Learning can offer. The primary audience for our product is healthcare organizations.
- **Marketing team:** These professionals will help develop a marketing campaign that includes social media content, paid ads, print media, and more.
- **Client Support team:** Expert professionals who are available to support any technical issues and answer any questions from clients.
- **Medical Profession Consulting:** Available to provide feedback on the experience and the quality of the simulation.

Additional roles may be added as further opportunities are discovered; however, this should suffice as the core team that can help stand up our product.

### Rollout Plan

#### Phase 1 (0-6 months)

1. **Product Development:** The core team will continue to develop the AI model by training it with video content, clinical guidelines, medical textbooks, etc.
2. **Marketing:** The sales and marketing teams will campaign to find clients for a pilot/trial experience with our product.
3. **Gathering success stories:** During this phase, the goal is to demonstrate the effectiveness of our innovative tool while collecting high-impact testimonials from clients and patients.

#### Phase 2 (6 -12 months)

1. **Marketing:** The sales and marketing teams will start their second marketing campaign, which will include testimonials, wins, and data gathered in the prior phase.
2. **Product enhancements:** The AI model should continue to evolve as more data from Phase 1 clients are added to the model. Additionally, we will gather data from the pilot, identify defects/bugs, and add any vital features to our product.

Additional phases will roll out once additional funding is secured.

## Partnership

Once a client has been onboarded, the following framework can be followed to ensure optimal client experience:

1. A client support team is assigned to onboard and manage the client.
2. Kick-off meeting with clients to identify training needs.
3. Scope of Work is identified, and the project begins.
4. Instructional designers, VR developers, VR UX designers, and medical profession consultants ideate various learning needs and scenarios. Additionally, data is gathered from clients to understand their unique processes, procedures, and guidelines.
5. Machine learning developers add data to models for training.
6. A virtual sandbox is created and delivered to the client.
7. The support team provides demonstrations and guidance on how to use various prompts to create various training scenarios.
  - a. The support team is available to provide support.
  - b. The support team will gather and analyze post-training data and provide it to the client.

## Billing Process

Currently, a subscription service is offered for our product. An ongoing subscription model allows for users to benefit from continuous updates to the proprietary ML algorithm powering our AI model. Clients can subscribe to individual, team, and enterprise options.

- **Individual Subscription:** \$150 per month – 1 Subscription License
- **Team Subscription:** \$1,200 per month – 10 Subscription Licenses
- **Enterprise Subscription:** \$20,000 per month – 200 Subscription Licenses
- **Academic Subscription:** \$12,000 per month – 100 Subscription Licenses

Each subscription is valid for use on one VR headset at a time.

## Data Collection

Our product leverages xApi to gather performance data. This will allow our software to collect insights into what actions users are taking in the virtual environment. For example, if a scenario requires a user to gain information about a patient prior to conducting a procedure, the xApi will report whether that step was performed or not. The data will be analyzed to evaluate the effectiveness of a learning scenario and the performance of users. Clients and individual users will have an opportunity to provide feedback through a post-experience survey, sharing their thoughts and reactions to their overall experience.

## Protocols

1. HIPPA compliance – We understand the critical role healthcare professionals play in maintaining sensitive patient information. InVision Learning will have an in-house committee to monitor the privacy and security of patient information continuously.
2. Informed consent – Furthermore, we recommend that clients onboarding our service add additional details to their informed consent clause, including the use of their data to train AI

models. All data, including that generated from video content, will be aggregated and blurred/removed, including personal information. We still believe it is a patient's right to consent despite having these data protection and privacy measures in place.

3. We also require relevant medical boards to sign off on the validity of our AI model on a periodic basis by regularly auditing a simulation. This added step ensures that medical associations and professionals can trust the technology.
4. **Sandbox Environments** – As we continue to grow, we understand that each healthcare institution has its own processes and procedures. While we use client data to train our model, we create sandbox environments to ensure that each client has access to only the virtual training environments related to them. This helps to ensure healthcare competitors don't have a line of sight on internal processes and procedures from other institutions.

## Market Differentiators

InVision Learning is aiming to revolutionize training in the healthcare industry. Here are a few reasons we believe make us the leader in this space.

1. **Expert Experience Simulator** – Our proprietary software enables healthcare organizations to develop learning solutions customized to their own needs. Our algorithm adapts to new data that is continuously added to train our model. This feature enables our service to provide endless scenarios that can be artificially generated for diverse training needs.
2. **Accessibility** – Our product is compatible with the most popular VR hardware available on the market. This helps protect any potential investment made by customers who have previously purchased hardware.
3. **Reduced costs** – Often, there can be extensive costs associated with in-person training. In-person training can include costs related to flying in board-certified professionals, hotels, food, etc. Additionally, one concern we've heard from users is time constraints; a VR learning environment would decrease travel time associated with in-personal learning.
4. **Increased engagement** – Intelligent Tutoring Systems (ITS) have been more useful in developing healthcare professionals when compared to traditional e-learning solutions (Muñoz et al., 2010). While we acknowledge ITS's have been useful in the past, InVision Learning provides even more opportunity for engagement. Our product can provide the same benefits of an ITS system, we also provide a virtual environment where professionals can gain experience applying what they've learned.
5. **Effective as in person training** – Research completed by Bluestone et al., (2013) suggests that effective computer-based learning can be just as effective as in-person solutions. Furthermore, computer/technology-based learning can reduce costs associated with in-person learning solutions.

## Marketing

### Company name: Invision Learning

The name "InVision Learning" is a blend of two key concepts:

1. **InVision**: This part of the name signifies the company's focus on immersive and visionary technology. "InVision" suggests the idea of seeing and experiencing medical procedures in a new

and innovative way, leveraging the power of virtual reality to create realistic and interactive simulations.

2. **Learning:** This part of the name emphasizes the company's commitment to education and training. By incorporating advanced AI and VR technologies, InVision Learning aims to enhance the learning experience for medical professionals, allowing them to practice and refine their skills in a safe and controlled environment.

Together, “**InVision Learning**” conveys the company's mission to revolutionize medical training through cutting-edge technology, providing a platform where medical professionals can envision and learn complex procedures with confidence and precision.

## Marketing Materials



Figure 4 – Logo

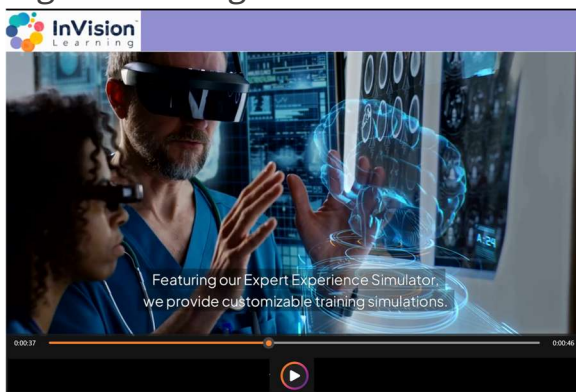


Figure 6 – Company Overview Video

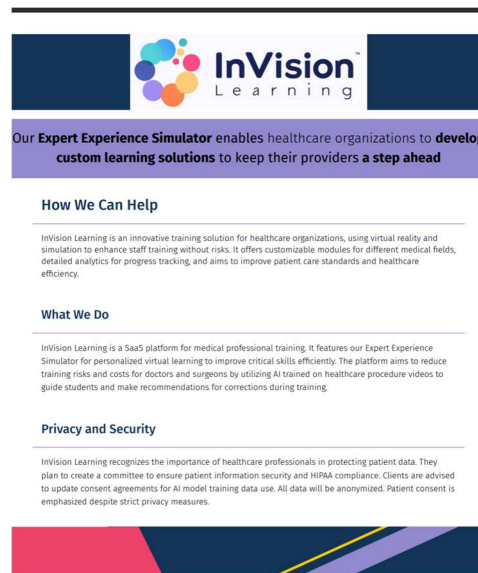


Figure 5 – 1-Page Ad Splash



Figure 7 – Targeted Ad

## Primary audience

The primary clients we will be targeting will be professionals on the administration and education side of healthcare. Focusing on the cost-saving benefits and versatility of the tool will make it more



appealing to organizations that oversee the training of many specialties. The main message behind this initial marketing effort will be that administrative and education professionals in the medical industry need a way to train more efficiently and with less overhead costs compared to traditional methods.

Marketing plan

Attending and sponsoring medical conferences will be the main marketing activity, focusing on building a professional network and providing opportunities to try out the tool at a booth. Initial marketing success is expected to be defined as garnering interest with follow-on meetings with prospective clients, with a couple of trial agreements per conference. These initial agreements will generate proven capability for further agreements and contracts with larger corporations and government entities. Further information about the marketing plan is shown in the Action Plan.

We will be targeting medical and academic professionals by advertising on websites and social media sites that are frequently visited by our target audience. We will target the top 20% of those sites, which include:

- **Social Media Sites:** LinkedIn, Twitter, Facebook
- **Industry Websites:** Medscape, WebMD, Healthline, PubMed, NEJM (New England Journal of Medicine)

How we stand out

Our tool will not be limited by specialty or by technique. The tool will be based on a wide set of procedure training videos, with specific steps identified for students to get more information on or to get validated during an assessment. Our tool will also allow organizations to create their own procedures and curriculums should they need to further develop their training program.

Action Plan

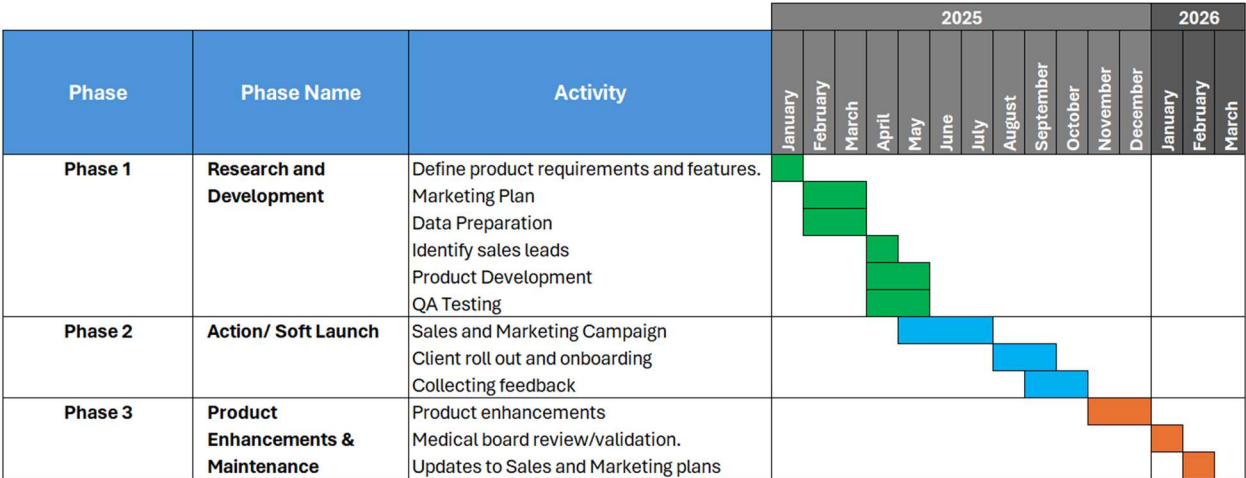


Figure 8 – Action Plan Gantt Chart

Phase 1: Research and Development

Goal: To develop a minimum viable product (MVP) for InVision Learning.

Portfolio: petetrujillo.com | LinkedIn: /in/petetru | Email: pete.tru@gmail.com

Duration: 0 to 7 months

### Technical Tasks:

- **1 Month:** Identify product requirements and key features for MVP and define the scope of work for phase 1.
  - a. Associated risk – MVP does not align with user needs.
  - b. Mitigation – Involve key stakeholders in the creation and review process of MVP.
- **2 Months – Data preparation:** Gather data such as clinical guidelines, protocols, medical textbooks, medical journals, training manuals, simulation guides, and HIPPA-compliant videos on medical procedures.
  - a. Associated risk – Data quality issues.
  - b. Mitigation – Create a process for checks and validations to uphold data integrity.
- **2 Months – Product Development:** The Development and Research team will develop the AI model by training it with data that was prepared in the data preparation step. In addition to training the model, our core team of VR UX designers, instructional designers, and engineers will create an alpha prototype of the InVision Learning program.
  - a. Associated risk – Technical challenges in building our solutions.
  - b. Mitigation – Leverage an agile approach to product design to identify issues quicker.
- **2 Months:** Our internal teams will perform quality assurance to support debugging and to improve the usability of our product.
  - a. Associated risk – High defect density (lots of bugs).
  - b. Mitigation – Implement rigorous QA testing frameworks and processes to identify issues. May need to partner with a vendor if the issue/bug log passes a certain threshold.

### Non-Technical Tasks

- **2 Months – Develop Marketing Plan:** After product features and requirements are identified, our marketing team will begin drafting a strategy for our initial marketing campaign. InVision Learning will be approaching medical venture capital firms for initial funding. This approach will be taken due to the narrow focus of the tool initially rather than approaching banks for loans. According to current projections, InVision Learning is set to repay all debts by the end of Year 3.
  - a. Associated risk – Poor market research.
  - b. Mitigation – Leverage test and learn approach (A/B testing) to identify marketing strategies that work.
- **1 Month:** The sales team will research and identify ideal client profiles. Additionally, they will develop a targeted strategy to attract, engage, and enroll clients in our pilot program.
  - a. Associated risk – Team does not find enough clients for our pilot program.
  - b. Mitigation – Create a large pipeline of clients through various marketing channels – social media, email marketing, referral programs, networking events, and more.
- **3 Months:** The marketing and sales team will begin their marketing and sales campaign to identify and attract at least 10 potential clients.
  - a. Associated risk – Ineffective client acquisition strategy.
  - b. Mitigation – Continuously monitor and refine the client acquisition strategy based on performance metrics and feedback.

Month	Activity	Outcome	Metric(s)
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January 2025	Define product requirements and features.	An outline for an MVP.	Completion status – Y/N.  Weekly check-in to monitor progress.
Feb – March 2025	Marketing Plan	Completed marketing strategy and campaign.	Completion status – Y/N.  Weekly check-in to monitor progress.
Feb – March 2025	Data Preparation	Prepared data set to train AI model.	Completion status – Y/N.  Weekly check-in to monitor progress.
April 2025	Identify sales leads	Completed client acquisition strategy and plan.	Completion status – Y/N.  Weekly check-in to monitor progress.
April – May 2025	Product Development	Alpha version of AI model and InVision Learning software.	Completion status – Y/N.  Weekly check-in to monitor progress.
April – May 2025	QA Testing	Usable Alpha version of AI model and InVision Learning software.	Defect Density metric.  Average time to resolve defect.  Weekly check-in to monitor progress.
May – July 2025	Sales and Marketing Campaign	Identify potential clients for product.  Secure 5 clients for phase 2.	Number of qualified leads.  Conversion Rate.  Weekly Sales Pipeline check-in.

Figure 9 – Phase 1: Research and Development Tasks

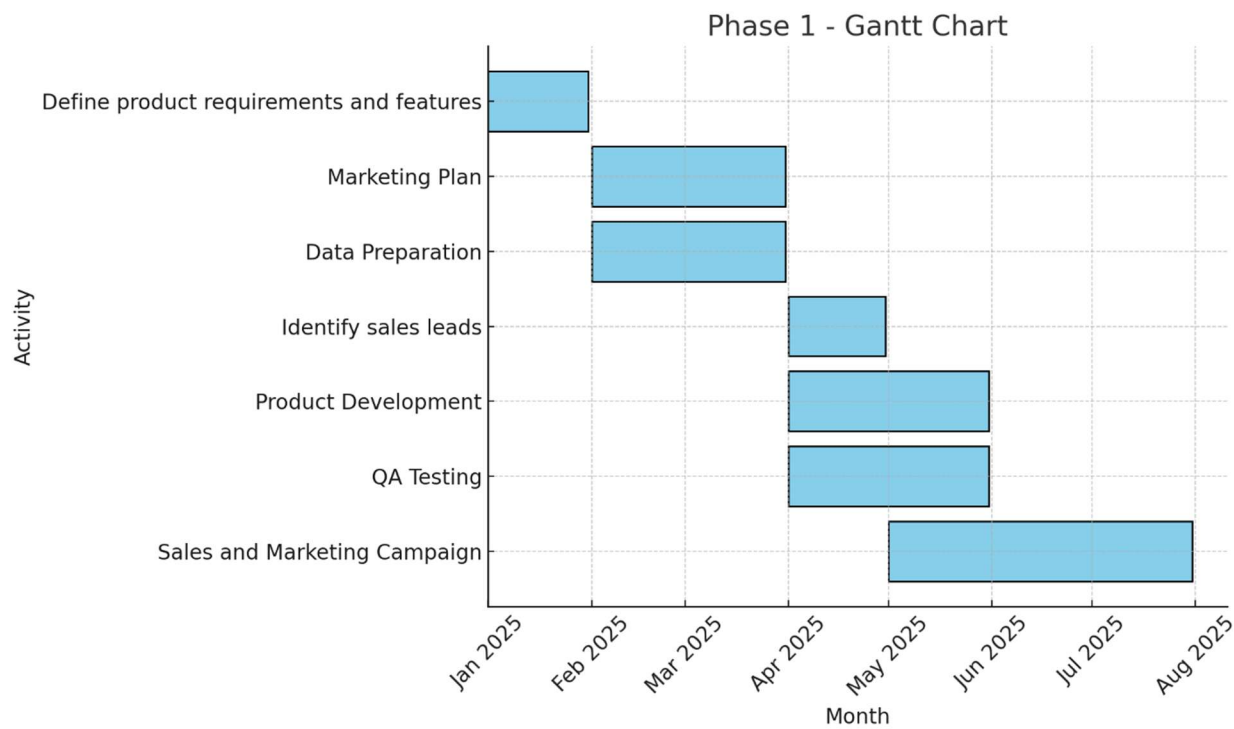


Figure 10 – Phase 1: Research and Development Gantt

### Phase 2: Action/Soft Launch Phase

**Goal:** To launch our MVP, gather at least 5 clients, and gather real-world feedback and testimonials on our product.

**Duration:** 5 Months

**Tasks:**

- **2 Months:** Roll out an alpha version of the product to at least 5 clients.
  - a) Associated risk – Unstable alpha version.
  - b) Mitigation – Limit product to MVP with key features. This should help limit the amount of complex coding needed.
- **1 Month – Client onboarding:** Provide clients with training and support for using our product. Please refer to the Partnership section of “Additional Product and Operation Details” for specific steps on how we plan to onboard new clients.
  - a) Associated risk – Poor client onboarding experience.
  - b) Mitigation – We will collect important metrics such as client/learner satisfaction scores to ensure we are documenting what is working and what is not.
- **2 Months – Collecting feedback:** During this step, our team will gather and use client feedback for improvements. Additionally, towards the end of this step, we will gather client testimonials.
  - a) Associated risk – Poor client onboarding experience.
  - b) Mitigation – We will collect important metrics such as client/learner satisfaction scores to ensure we are documenting what is working and what is not.

While we will focus on the metrics and outcomes outlined below, we understand this process will help to establish benchmarks for future performance.

Month	Activity	Outcome	Metric(s)
Aug – Sep 2025	Client roll out and onboarding	Successfully roll out alpha version and onboarding 5 clients.	Time to onboard Time to value
Sep – Oct 2025	Collecting feedback	Improve product based on feedback.	Customer response rate Customer support request rate Client/Learner satisfaction scores Client/Learner Testimonials

Figure 11 – Phase 2: Action/Soft Launch Phase Tasks

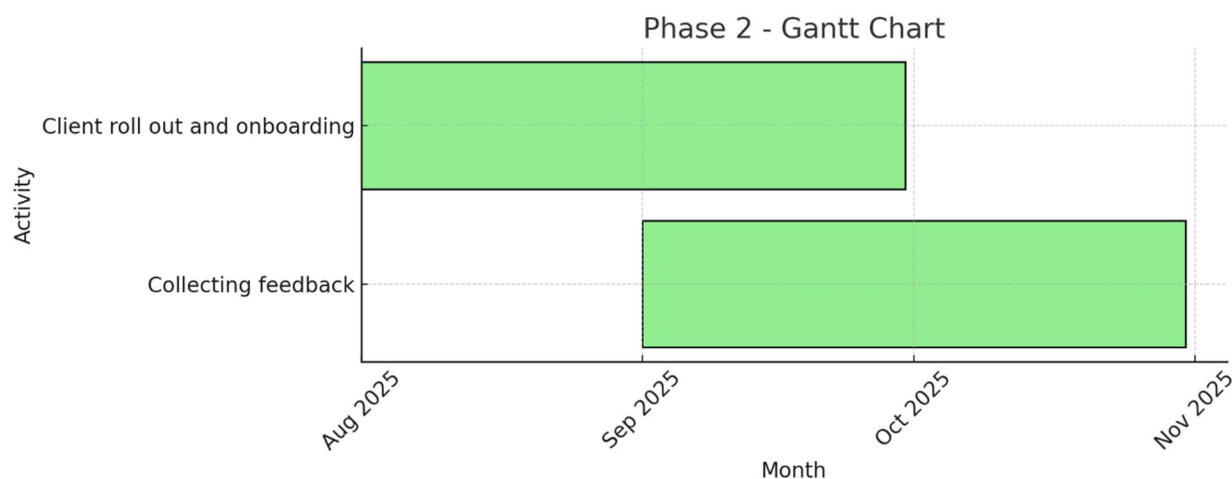


Figure 12 – Phase 2: Action/Soft Launch Phase Gantt

### Phase 3: Product Enhancements and Maintenance

**Goal:** Improve and optimize our platform, improve our AI model’s performance, and expand the user base.

**Duration:** 4 Months - Ongoing

#### Tasks:

- **2 Months:** Our engineers and machine learning developers will improve our AI model by preparing and adding additional data gathered during phases 1 and 2.
  - a. Associated Risk – Model degradation.
  - b. Mitigation – Algorithmic Impact Assessments – Continuously monitor the AI model’s performance and conduct regular evaluations to identify and promptly address any issues.
- **1 Month:** Partner with industry-leading medical review boards for validation of our AI model and platform.

- a. Associated Risk – Corrective feedback from the medical review board may require additional time for improvements.
  - b. Mitigation – Build engagement from trusted stakeholders throughout the product lifecycle.
- **1-3 Months:** Hiring additional staff such as developers, researchers, marketing, and sales representatives to help sustain growth in year 2.
  - a. Associated Risk – If the company does not have the necessary staff, it may not be able to meet its growth goals for sustainable business growth.
  - b. Create a pipeline for talent prior to the 3-month hiring cycle.
- **1 Month:** Sales and marketing teams will revise marketing and sales material to include client testimonials and review board approvals. Teams will continue to source and onboard new clients.
  - a. Associated Risk – Ineffective marketing campaigns.
  - b. Mitigation – Leverage test and learn approach (A/B testing) to identify marketing strategies that work.
- **Ongoing:**
  - a. Ongoing maintenance and improvements to AI model and product.

Month	Activity	Outcome	Metric(s)
Nov – Dec 2025	Product enhancements	Improve AI model accuracy, and platform user experience.	Decrease in negative feedback to model output. (Was this scenario useful or not?)  Client/Learner satisfaction scores.
Jan 2026	Medical board review/validation.	Feedback or approval from board review.	Approval status Y/N  Board review testimonials
Jan 2026	Hiring additional staff.	We will need to hire additional developers, sales, and marketing team members to support year 2 growth.	Increase headcount by 20%  Completion status Y/N
Feb 2026	Updates to Sales and Marketing plans	Revised sales and marketing plans/strategy	Increase in client acquisition  Onboard 10 new enterprise clients
Onwards	Product enhancements  Additional marketing	Ongoing improvements to product, service, and growing customer base.	Increase in enterprise, academic, and team-based clients in pipeline.

Figure 13 – Product Enhancements and Maintenance Tasks

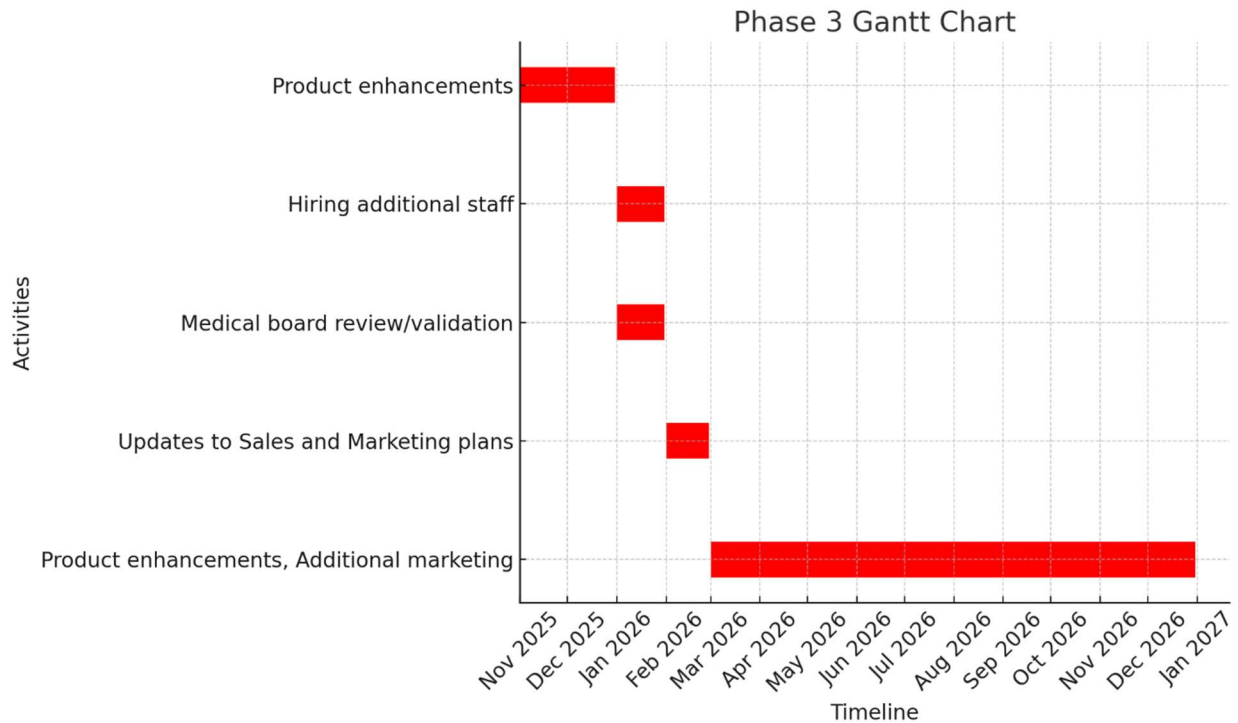


Figure 14 – Product Enhancements and Maintenance Gantt

## Financial Analysis

### Introduction

InVision Learning aims to revolutionize VR training and professional consulting services. Our innovative solutions cater to individual practitioners, small teams, large organizations, and academic institutions. This financial analysis outlines our revenue streams, product offerings, and the financial strategies required to make InVision Learning a sustainable and profitable venture. Projections and analysis of revenue are based on **Year 2** figures due to the action plan and development efforts in **Year 1**.

### Revenue Streams

InVision Learning generates revenue through various streams, encompassing product sales and service offerings. Our primary revenue streams include:

#### Subscription Solutions:

- **Individual Subscription:** Ideal for solo practitioners or individual medical professionals. This option provides access to the full suite of Expert Experience Simulator features, allowing users to practice and refine their techniques at their own pace.  
**\$150 per month – 1 Subscription License**
- **Team Subscription:** Perfect for small medical teams or departments, this Subscription offers up to ten licenses. It enables collaborative learning and training, allowing team members to share insights and improve their skills together. This is great for fostering a cohesive learning environment

within smaller groups.

***\$1,200 per month – 10 Subscription Licenses***

- **Enterprise Subscription:** Designed for large healthcare organizations or educational institutions, this Subscription supports up to two hundred users. It provides extensive access to the Expert Experience Simulator, making it an excellent choice for comprehensive training programs. This ensures that many professionals can benefit from cutting-edge VR training simultaneously, promoting widespread skill development and standardization across the organization. This Subscription provides complete access to the xApi performance metric API for assessing in-depth training performance data of students.

***\$20,000 per month – 200 Subscription Licenses***

- **Academic Subscription:** Tailored for academic institutions, this Subscription supports up to one hundred users. It provides extensive access to the Expert Experience Simulator, making it an excellent choice for comprehensive training programs. This ensures that a significant number of students and researchers can benefit from cutting-edge VR training simultaneously, promoting widespread skill development and standardization across the university. Furthermore, the academic Subscription includes participation in the beta features program, granting customers early access to new features and allowing them to utilize the xApi performance AI.

***\$12,000 per month – 100 Subscription Licenses***

## Consulting/Professional Services Solutions:

- **Expert Simulation Building Consulting:** Expert Simulation Building Consulting: This service involves up to 120 hours of expert labor, during which our VR UX Designers and QA specialists build one custom simulation. Using your video, documentation, and other information, our designers will create a custom VR simulation tailored to your needs.

***\$13,343.20 - Up to 120 hours of Consulting.***

- **Additional Training:** Our additional training service is designed to equip you to be experts in using InVision Learning's solutions. Taught by our industry UX Design consultants, the training is customized to meet your unique requirements. Our Expert Trainers will perform the training on-site and be able to coach your team.

***\$8,250.00 - Up to 40 hours of training including travel time.***

- **On-Going Support:** We offer a dedicated support team that is available to address any issues, provide troubleshooting, and offer guidance whenever needed. Our Client Support Specialists will handle your requests.

***\$2,163.60 - Up to 40 hours of Consulting***

- **Technical Consulting:** We offer expert advice and solutions to address your most complex technical challenges. Our team of experienced consultants brings a wealth of knowledge and expertise in various technical domains, including IT infrastructure, software development, and machine learning.

***\$9,115.20 - Up to 40 hours of Consulting including travel time.***

## Additional Revenue Streams

- **Sublicensing/White Label:** Software resellers can take advantage of our sublicensing program. Our licensing agreements can support white labeling and reseller agreements. White label solutions can also utilize this option to support up to one hundred users. It may be possible to offer smaller licensing packages as needed. Sublicensing offers extensive access to the Expert Portfolio: [petetrujillo.com](http://petetrujillo.com) | [LinkedIn: /in/petetru](https://www.linkedin.com/in/petetru) | [Email: pete.tru@gmail.com](mailto:pete.tru@gmail.com)

Experience Simulator.

**Please contact your sales representative for more information.**

## Financial Performance

### Financial Projections and Investments

	Year 1	Year 2	Year 3	Year 4
	<i>Development of Product &amp; Testing in Year 1 Trial Beta Clients</i>	<i>Projected based on Marketing Action Plan &amp; AI Estimates</i>	<i>Projected Revenue with AI Estimates</i>	<i>+ 5% Growth in Client Base Retain Subscription Counts from Year 3</i>
Revenue Total	\$ -	\$ 5,150,569	\$ 20,254,969	\$ 21,267,718
A. Subscription Sales Total:	\$ -	\$ 3,629,400	\$ 18,733,800	\$ 19,670,490
Individual subscription	\$ -	\$ 5,400	\$ 23,400	\$ 24,570
Team subscription	\$ -	\$ 72,000	\$ 374,400	\$ 393,120
Enterprise subscription	\$ -	\$ 2,400,000	\$ 12,720,000	\$ 13,356,000
Academic subscription	\$ -	\$ 864,000	\$ 3,744,000	\$ 3,931,200
Sublicensing	\$ -	\$ 288,000	\$ 1,872,000	\$ 1,965,600
B. Consulting/ Professional Services Total:	\$ -	\$ 1,521,169	\$ 1,521,169	\$ 1,597,228
Expert Simulation Building Consulting	\$ -	\$ 800,593	\$ 800,593	\$ 840,623
Additional Training	\$ -	\$ 495,000	\$ 495,000	\$ 519,750
On-Going Support	\$ -	\$ 43,272	\$ 43,272	\$ 45,436
Technical Consulting	\$ -	\$ 182,304	\$ 182,304	\$ 191,419
	Year 1	Year 2	Year 3	Year 4
	<i>Development of Product &amp; Testing in Year 1</i>	<i>Overall Projected 3% Costs Increases vs. Year 1 Increased Marketing Expenses</i>	<i>Overall Projected 3% Costs Increases vs. Year 2</i>	<i>Overall Projected 3% Costs Increases vs. Year 3</i>
Operating Expenses	\$ (6,590,622)	\$ (8,522,741)	\$ (8,778,423)	\$ (9,041,776)
A. Talent Costs Total:	\$ (5,110,000)	\$ (6,615,700)	\$ (6,814,171)	\$ (7,018,596)
Oversight & Legal	\$ (1,666,000)	\$ (1,715,980)	\$ (1,767,459)	\$ (1,820,483)
Development and Research	\$ (1,806,000)	\$ (2,744,000)	\$ (2,826,320)	\$ (2,911,110)
Sales and Marketing	\$ (714,000)	\$ (1,204,000)	\$ (1,240,120)	\$ (1,277,324)
Customer Service	\$ (224,000)	\$ (230,720)	\$ (237,642)	\$ (244,771)
Administrative	\$ (196,000)	\$ (201,880)	\$ (207,936)	\$ (214,174)
Finance & Accounting	\$ (196,000)	\$ (201,880)	\$ (207,936)	\$ (214,174)
IT Support	\$ (308,000)	\$ (317,240)	\$ (326,757)	\$ (336,560)
B. Marketing Total:	\$ (873,600)	\$ (1,281,808)	\$ (1,320,262)	\$ (1,359,870)
Advertising-Digital	\$ (456,000)	\$ (760,000)	\$ (782,800)	\$ (806,284)
Conferences	\$ (144,000)	\$ (240,000)	\$ (247,200)	\$ (254,616)
On-Site Sales	\$ (273,600)	\$ (281,808)	\$ (290,262)	\$ (298,970)
C. IT Costs Total:	\$ (607,022)	\$ (625,233)	\$ (643,990)	\$ (663,310)
Hardware	\$ (525,952)	\$ (541,731)	\$ (557,983)	\$ (574,722)
Software	\$ (81,070)	\$ (83,502)	\$ (86,007)	\$ (88,588)
Revenue Required to Breakeven	\$ 6,590,622	\$ 8,522,741	\$ 8,778,423	\$ 9,041,776
Profit/Losses	\$ (\$6,590,622)	\$ (\$3,372,172)	\$ 11,476,546	\$ 12,225,942
Revolving Debit / Surplus Cash		\$ (6,590,622)	\$ (9,962,794)	\$ 1,513,752
Credits/ Debts		\$ (9,962,794)	\$ 1,513,752	\$ 13,739,694

Figure 15 – InVision Learning - Four Year Financial Performance



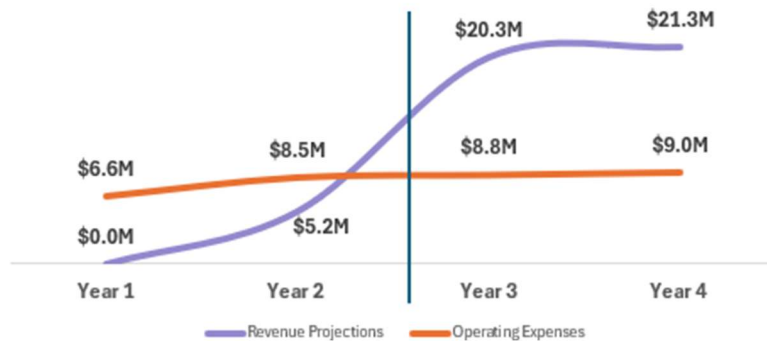


Figure 16 – InVision Learning – Revenue/Expenses Projections (\$Millions)

**InVision Learning is poised for a promising future, leveraging strategic investments and a strong foundation built over the years.**

- InVision Learning anticipates significant revenue growth in the coming years.
- Key growth strategies include retaining the Subscription base, sublicensing deals, and exploring new markets.
- Despite a 3% cost increase due to inflation, strong profit margins are expected.
- Year 3 aims for profitability, with plans to reinvest profits into new solutions and expansions by Year 4.
- InVision Learning will be approaching medical venture capital firms for initial funding. This approach will be taken due to the narrow focus of the tool initially rather than approaching banks for loans.
- According to current projections, InVision Learning is set to repay all debts by the end of Year 3.

Operating Expenses – Year 1 Analysis

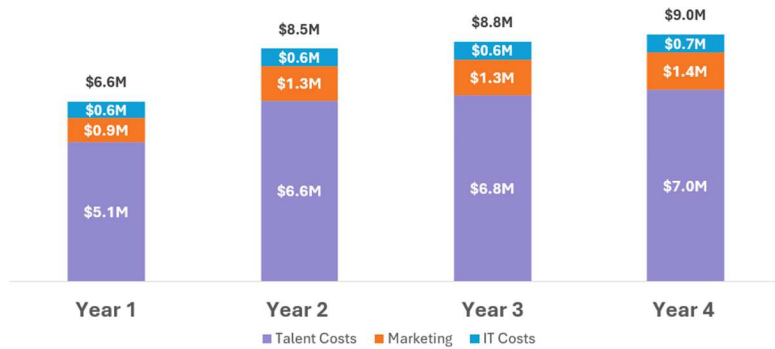


Figure 17 – InVision Learning - Operating Expenses Projections (\$Millions)

In Year 1, **Total Operating Expenses** for **InVision Learning** amounted to **\$6,590,622**, displaying a significant financial commitment to various facets of the organization.



- Investment in talent is our most significant expenditure, totaling **\$5,110,000**. The top expense is Development and Research talent at **\$1,806,000**, followed by Leadership Oversight/Legal at **\$1,666,000**, and Sales/Marketing at **\$714,000**.
- **Marketing expenses** represent another significant expenditure, amounting to **\$873,600**. This investment is strategically allocated across several key areas, including **\$456,000** for Digital Advertising, **\$144,000** for Industry Events and Conferences, and **\$273,600** for On-Site Sales travel expenses.
- Additionally, IT expenses amounted to **\$607,022**, with a significant allocation towards Hardware **\$525,952** and Software **\$81,070**.
  - There is a pressing need to invest further in our IT infrastructure, particularly in the areas of AI and machine learning. These advanced technologies require additional hardware and software resources to support our innovative initiatives and maintain our competitive edge.

Revenue – Year 2 Analysis

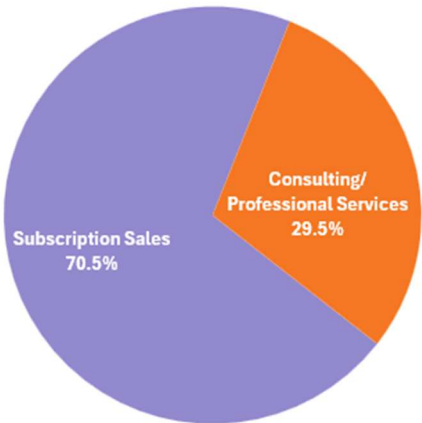


Figure 18 – Revenue Projected Proportions

Subscription Sales – Year 2:

Subscription sales are the largest driver of revenue, earning **\$3,629,400** in Year 2. This significantly outpaces the revenue generated from Consulting/professional services, which totals **\$1,521,169**.

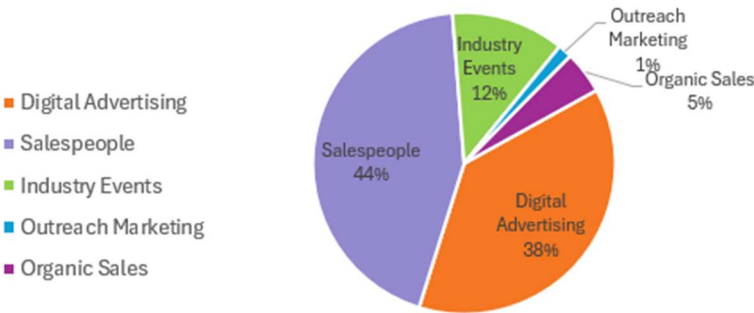


Figure 19 – Year 2 – Revenue Sales Sources

Revenue generation from Subscription sales will be derived through multiple channels, including digital marketing campaigns, direct sales efforts, participation in industry expos, targeted outreach initiatives, and organic acquisition. Our projections indicate that direct sales efforts will contribute approximately **44%** of the total Subscription revenue, while digital advertising (**38%**) and industry events and conferences (**12%**) are significant revenue drivers.

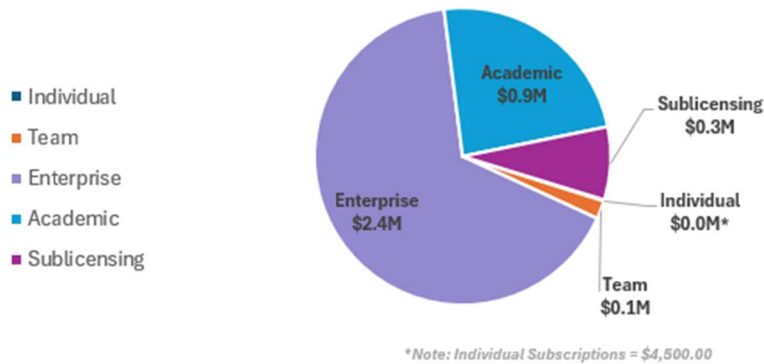


Figure 20 – Year 2 – Subscription Sales (\$Millions)

In Year 2, these efforts resulted in a diverse distribution of sales across different Subscription types, including Individual, Team, Enterprise, Academic, and Sublicensing Subscriptions. The total revenue from these Subscriptions amounted to **\$3,629,400**, with the Enterprise Subscription being the largest contributor at **\$2,400,00**, followed by **Academic** at **\$864,000**, and **Sublicensing** at **\$288,000**.

**Consulting/Professional Services Sales:**



Figure 21– Year 2 – Consulting Sales (\$Thousands)

In addition to Subscription sales, Consulting services provided a substantial boost to the company's revenue. The total Consulting revenue was **\$1,521,169**, driven by **Expert Simulation Building Consulting** at **\$800,593**, followed by **Additional Training** at **\$495,000**.

- Enterprise license subscribers were the largest purchasers of Consulting services.

## Breakeven Analysis-Year 2 Operating Expenses

Operating Expenses				\$	(8,522,741)
Product Type	Solution	Price per Unit	Sales Required	Total Revenue	
Consulting	Expert Simulation Building	\$13,343.22	59	\$787,249.98	
	Additional Training	\$8,250.00	59	\$486,750.00	
	On-Going Support	\$2,163.60	21	\$45,435.60	
	Technical Consulting	\$9,115.20	20	\$182,304.00	
Consulting			159	\$1,501,739.58	
Subscription	Individual Subscription	\$1,800	301	\$541,800.00	
	Team Subscription	\$14,400	100	\$1,440,000.00	
	Enterprise Subscription	\$240,000	12	\$2,880,000.00	
	Academic Subscription	\$144,000	10	\$1,440,000.00	
	Sublicensing Subscription	\$144,000	5	\$720,000.00	
Subscription			428	\$7,021,800.00	
Total			746	\$8,523,539.58	

Figure 22 – Year 2- Sale Breakeven Analysis

To achieve break-even with operating expenses totaling \$8,522,741, the company needs to generate \$1,501,734 from Consulting services and \$7,021,800 from Subscription sales. **Year 2** was used for analysis when InVision Learning is planned to **have sales**.

**For Consulting, this necessitates the sale of approximately:**

- 59 units of Expert Simulation Building Consulting
- 59 units of Additional Training
- 21 units of On-Going Support
- 20 units of Technical Consulting

**For Subscriptions, this requires the sale of approximately:**

- 301 Individual Subscriptions
- 100 Team Subscriptions
- 12 Enterprise Subscriptions
- 10 Academic Subscriptions
- 5 Sublicensing Subscriptions

**Assumptions:**

- Operating expenses are from Year 2
- Consulting revenue is projected at \$1,500,000.
- A defined sales ratio range is provided for expected contributions in both categories, derived from financial analysis (e.g., 40% of Subscription sales from Enterprise Subscriptions, 33% of Consulting sales from Additional Training).
- The percentage distribution of sales for both Consulting and Subscription products remains consistent.

- Prices for all products are fixed and unchanged over the period considered.

## Conclusion/Summary

Investing in our product, InVision Learning, is a strategic move that aligns with the growing demand for innovative and immersive learning solutions. Our comprehensive financial projections, combined with the rapid growth of the educational technology market, demonstrate that our product promises significant revenue potential thanks to our consulting and subscription-based sales model. More importantly, we establish our company as a leader in this sector, providing transformative and impactful learning to tomorrow's healthcare professionals. By supporting this initiative, you join us in revolutionizing how education is delivered, making learning more engaging, accessible, and effective.

In the event our company meets challenges in the market, we want to protect your investments. Our exit strategy is meticulously crafted to maximize stakeholder value while ensuring a seamless transition. Over the next 5 years, we plan to scale the program, meeting key milestones in market penetration and revenue generation. At the peak of our trajectory, we will seek strategic **Partnership** and **Acquisition** opportunities with major educational Technology firms or VR companies. This approach is designed to maximize profitability while securing the program's legacy and ensuring it continues to drive innovation in virtual reality education beyond our initial investment horizon.

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provides context on overall VR technology trends that may impact the education sector, though specific details are not available in the given sources.

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# Appendix

## Additional Graphics and Charts

Phase	Phase Name	Activity	2025												2026		
			January	February	March	April	May	June	July	August	September	October	November	December	January	February	March
Phase 1	Research and Development	Define product requirements and features. Marketing Plan Data Preparation Identify sales leads Product Development QA Testing															
Phase 2	Action/ Soft Launch	Sales and Marketing Campaign Client roll out and onboarding Collecting feedback															
Phase 3	Product Enhancements & Maintenance	Product enhancements Medical board review/validation. Updates to Sales and Marketing plans															

Figure 23 – Excel Gantt Chart

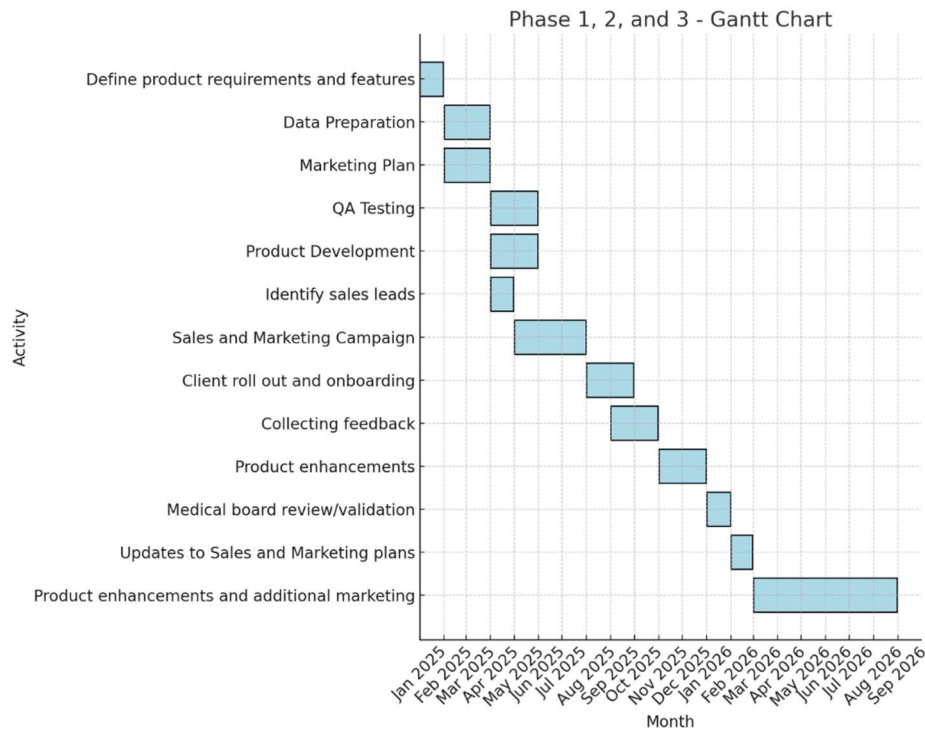


Figure 24 – ChatGPT Gantt Chart