

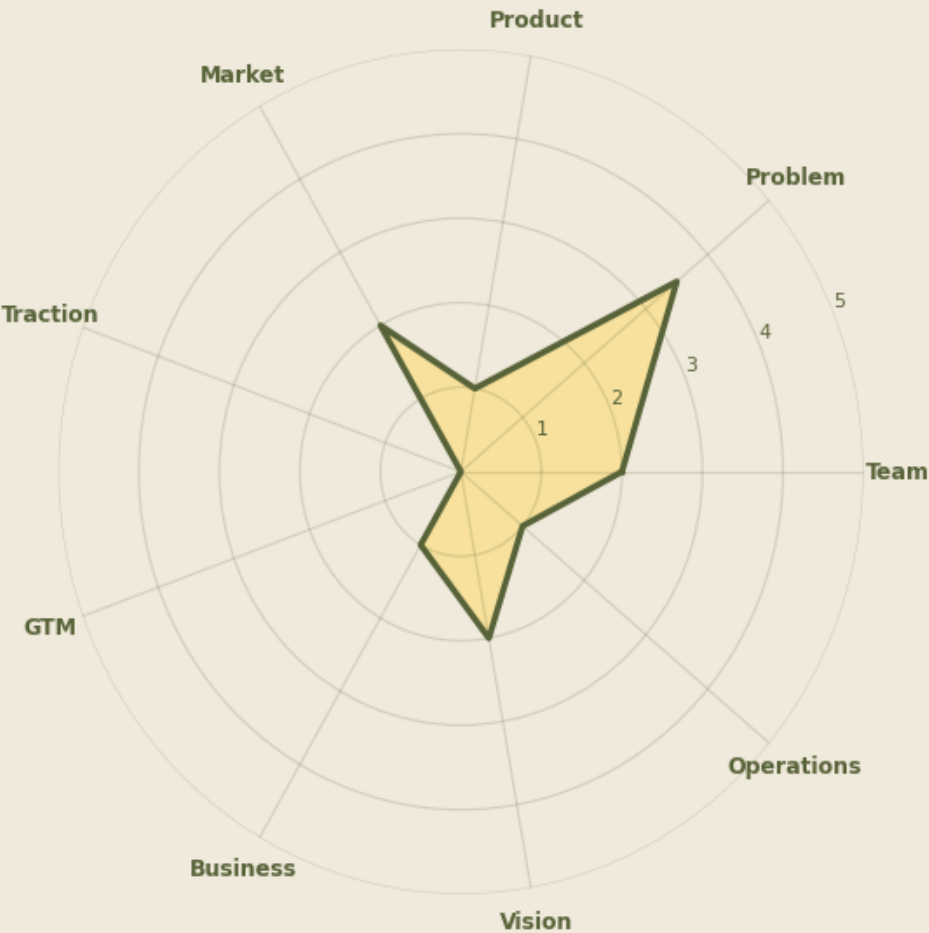
# EVALUATION REPORT: STARTUP

Date: 2026-02-11

| VERDICT | SCORE  | STAGE    |
|---------|--------|----------|
| PENDING | 0 / 45 | Pre-Seed |

## Executive Summary

While the problem you're addressing shows signs of market demand, your current product, traction, and business model are critically underdeveloped and unsustainable. You have significant red flags across multiple dimensions that need immediate and drastic attention to even be considered viable.



# Detailed Dimension Analysis

## TEAM (2.0/5) | Confidence: Medium

**Justification:** You have some AI engineering experience, but a significant gap in domain expertise, unclear roles, and slow execution speed are hindering progress. Your founder ownership is also low for this stage.

### ■ Red Flags:

- Domain Experience Gap
- Cap Table/Equity Risk
- Tech & Production Risk
- Founder-Market Fit Alignment
- Clarity of Thought
- Velocity Risk
- Insight Risk

■ **Tactical Fix:** Clearly define founder roles and responsibilities with measurable KPIs for each.; Demonstrate a concrete plan to acquire domain expertise, either through hiring or strategic advisors, within the next 3 months.

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## PROBLEM (3.5/5) | Confidence: Medium

**Justification:** The problem symptoms are validated by search data, and there's active interest in solutions. However, there are contradictions in urgency and active search, and the market needs more education on the specific pain point.

### ■ Red Flags:

- Urgency Contradiction between Impact and Frequency
- Active Search Contradiction between Severity and Current Solution
- Market Education Risk

■ **Tactical Fix:** Conduct targeted customer interviews to quantify the urgency and impact of the problem, focusing on how current solutions fail.; Develop clear messaging that educates the market on the specific pain points your solution addresses, moving beyond generic descriptions.

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## PRODUCT (1.0/5) | Confidence: High

**Justification:** Your product is a generic LLM wrapper with no proprietary data or defensible moat, easily replicable. The claimed development stage doesn't match evidence, and it's a 'vitamin' in a competitive market.

### ■ Red Flags:

- The product has a generic 'moat' and is easily replicable.
- The development stage does not match the physical evidence.

- The market is a Red Ocean, and the differentiation is only incremental.
- The solution is a 'Vitamin' in a market that demands efficiency.
- The product claims to serve 'Everyone' or 'All SMEs' with a single feature set.
- The tech stack is 'No-Code' but claims 'Enterprise Security & High Scale'.
- The roadmap is empty, vague, or just lists 'Marketing'.

■ **Tactical Fix:** Develop a unique, proprietary dataset or algorithm that creates a defensible moat, and showcase this with a working prototype (demo link/screenshots).; Define a narrow beachhead market and build a 'must-have' solution for that specific niche, rather than a 'vitamin' for everyone.

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## MARKET (2.0/5) | Confidence: Medium

**Justification:** While the beachhead is credible and the market is growing, your TAM claims are not fully supported, your pricing model is unsustainable (\$0), and your acquisition channels are unproven.

### ■ Red Flags:

- TAM Discrepancy
- Pricing Model Risk
- Acquisition Channel Risk

■ **Tactical Fix:** Refine your TAM analysis to be more precise and aligned with your beachhead, and develop a tiered pricing strategy starting at a minimum of \$49/month.; Outline a concrete, scalable customer acquisition strategy beyond word-of-mouth, such as targeted content marketing or paid acquisition experiments.

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## TRACTION (0.0/5) | Confidence: High

**Justification:** You have zero traction: no users, no waitlist, and no revenue. Multiple contradictions indicate a lack of validation and significant execution lag.

### ■ Red Flags:

- Found Logic Contradiction: Fake Demand
- Execution Lag: MVP should ship in <3 months, but it has been over 6 months since founding
- Zero Validation: No data point (Revenue, Users, or Pilots) proving anyone wants this
- Death Zone: Planning for long sales cycles without a single LOI signed

■ **Tactical Fix:** Acquire your first 5 paying customers within the next 60 days, demonstrating a clear willingness to pay for your solution.; Build a waitlist of at least 100 interested users by offering early access or a compelling incentive.

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## GTM (0.0/5) | Confidence: High

**Justification:** Your GTM plan is generic and unrealistic, relying on 'hope' for word-of-mouth without specific mechanisms. You're trying to buy growth before product-market fit and have a mismatch

between sales motion and price point.

#### ■ Red Flags:

- No specific, proactive plan beyond 'Hope'.
- Trying to buy growth before product.
- Sales motion (Founder-led sales) does not match price point (Free).
- ICP description is too broad.

■ **Tactical Fix:** Develop a pilot program with 3-5 target ICPs, outlining specific outreach, onboarding, and feedback mechanisms.; Define a clear, measurable customer acquisition cost (CAC) target and a strategy to achieve it, even if it's initially experimental.

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## BUSINESS (1.0/5) | Confidence: High

**Justification:** Your business model is fundamentally unsustainable with a \$0 price point, 0% gross margin, and 0 months runway, indicating a high risk of running out of money.

#### ■ Red Flags:

- The 'Charity' Risk: The startup has a 'Freemium' pricing model with a price point of \$0, indicating a lack of clear path to making money.
- The 'Default Dead' Risk: The startup has a runway of 0 months, indicating a high risk of running out of money before finding Product-Market Fit.
- The 'Service Trap' Risk: The startup has a gross margin of 0%, indicating low margins and high variable costs which can kill the 'J-Curve' growth potential.
- The 'Price/Value' Risk: The startup's price point of \$0 is tiny for a B2B product, indicating a potential mismatch between price and value.

■ **Tactical Fix:** Implement a tiered pricing model starting at \$49/month for basic features and \$199/month for premium features, and validate this pricing with potential customers.; Secure at least 6 months of runway by demonstrating a clear path to revenue generation and cost management.

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## VISION (2.0/5) | Confidence: Medium

**Justification:** Your vision is ambitious but broad, and your claimed moat is not strong enough for deep tech. The primary risk you identify is trivial compared to existential risks.

#### ■ Red Flags:

- Wrapper Risk
- Ambition Mismatch

■ **Tactical Fix:** Focus your vision on a specific, achievable niche within the broader market, and articulate how you will build a defensible position there.; Clearly define your long-term vision and how it will evolve from your initial beachhead, demonstrating a strategic roadmap.

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## OPERATIONS (1.0/5) | Confidence: High

**Justification:** Your operational plan is severely flawed with unrealistic funding targets (\$500), a high burn rate with no runway, and unclear use of funds. Founders owning 100% is also unrealistic.

### ■ Red Flags:

- Ghost Ship
- Broken Math
- Dead Equity

■ **Tactical Fix:** Develop a realistic budget with a monthly burn rate and a funding target that provides at least 12-18 months of runway.; Clearly articulate the use of funds for key milestones, such as product development, customer acquisition, and team expansion.

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