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EVOLVE: Transforming Transformation

The Pitch in One Sentence

EVOLVE is the first end-to-end platform that discovers how your business actually works, designs optimal transformation paths, deploys AI agents autonomously, and continuously improves performance—turning process transformation from a multi-year consulting-led quagmire into an automated, high-velocity platform that brings transformation to millions of organizations with confidence, clarity, and speed.

What Makes This Possible: A modern platform and business model that can operate at scale and velocity impossible for traditional consulting-led or heavyweight enterprise tools, combined with network effects that make the platform smarter with every customer.

The Problem: Transformation is Gated by a Lack of Modern Tools to Drive the Transformation Process

Transformation has become the defining challenge for modern businesses—yet the technology and services to enable it remain traditional and unable to meet the opportunity. Ironically, transformation itself is in need of transformation.

Every company knows they need to transform: automate processes, deploy AI agents, improve efficiency. But **95% of transformation initiatives fail**—not because the technology doesn't work, but because companies are **flying blind**:

- **They don't know what to transform:** No visibility into actual processes (only imagined workflows)
- **They don't know where to start:** No way to prioritize by ROI or compare to peers
- **They don't know if it's working:** No continuous monitoring or assurance that improvements stick

This has stalled the entire transformation market:

The Traditional Model Can't Keep Up (But it Still Dominates)

Management Consulting Approach: * Hire McKinsey/Bain for \$2M+ to map processes and create PowerPoint strategy * Takes 6-12 months to produce recommendations * No execution, no technology, no continuous improvement * Only enterprises can afford it—**millions of SMBs and mid-market companies completely locked out**

Heavyweight Enterprise Tools: * **Process mining vendors** (Celonis, UiPath, SAP Signavio) sell \$100K-500K deployments * Static reports and dashboards—no transformation execution, no agent deployment * Require consultants and 3-6 month implementations * Enterprise-only pricing **excludes 99% of businesses** * Each customer siloed—no cross-company learning or peer benchmarking

RPA Platforms: * Require perfect process definitions upfront (chicken-and-egg problem) * Brittle automations that break with any process change * No discovery, no intelligence, no continuous learning

Custom Agent Development: * Takes months with no guarantee of ROI * Assumes you already know what to automate * Every company reinvents the wheel

The Result: Millions Are Stuck

- **150,000+ SMBs** have formal process needs but can't afford consulting or enterprise tools
- **Mid-market companies** waste millions on failed RPA and consulting projects
- **Even enterprises** see 95% failure rate on AI/automation initiatives
- **Business leaders are guessing:** “What should we automate? What's the ROI? How do we compare to peers?”

The transformation market desperately needs what the software industry learned 20 years ago: * **Freemium** to drive adoption at scale * **Product-led growth** to eliminate sales friction * **Network effects** so the product gets smarter with every user * **SMB-first** to reach millions, not just thousands

No one has brought this modern business model to transformation. Until now.

The Solution: The EVOLVE Platform

EVOLVE is the Tesla of business process transformation. Just as Tesla democratized self-driving with commodity cameras instead of expensive LIDAR sensors, EVOLVE uses commodity LLMs and vision AI to make enterprise-grade process intelligence accessible to businesses of all sizes—from SMBs to enterprises.

The Complete Transformation Lifecycle

EVOLVE guides executives through four integrated phases:

1. MINE: Discover Reality (FREE) **Edge-First Architecture:** * Lightweight desktop application runs locally on user devices * Observes workflows using local LLM inference—no cloud uploads required * Captures goals, teams, systems, processes, and activities automatically * Maps actual workflows (not imagined processes) across users and systems * Creates a living digital twin of current-state operations

Privacy & Security: * Sensitive data never leaves the user's environment * Edge processing eliminates cloud security concerns * Anonymous workflow patterns contribute to aggregate intelligence * Users maintain complete control over their data

Value Proposition: * **Simple, No cost discovery** very low bar to entry * **Immediate value / trust** relevant tips and insights at every step * **No expensive consultants** or manual process mapping * **Reduced security concerns** all data stays local

2. DESIGN: Chart the Path

- AI-powered analysis identifies transformation opportunities ranked by ROI
- Recommendations informed by aggregate patterns across the platform
- Generates specific recommendations with effort/impact matrices
- Creates executable transformation roadmaps with sequenced initiatives
- Simulates outcomes using success patterns from similar companies
- **Industry benchmarks show you how you compare to peers**
- **From insight to action plan in days, not months**

3. DELIVER: Execute Transformation

- Automatically authors AI agents tailored to your specific workflows
- Agent templates informed by successful deployments across industries
- Agents run in shadow mode for validation before going live
- Continuous learning from deployment successes and failures
- Works with existing systems—no rip-and-replace required
- **Transformation without the traditional implementation nightmare**

4. MANAGE: Ensure Continuous Excellence

- Real-time observation of process performance vs. targets
- Service assurance validates improvements are sustained
- Continuous assessment identifies new optimization opportunities
- Automated reporting shows ongoing ROI to stakeholders
- **Peer comparison dashboards** show how you're performing vs. industry
- Learning loops feed insights back for continuous improvement
- **Your transformation investment compounds over time**

The Result: A Self-Improving Intelligence System

EVOLVE doesn't just transform your processes once—it creates a continuous improvement engine that gets smarter as your business evolves. You move from static process maps to a living system that observes, learns, optimizes, and reports autonomously.

Why This Matters Now

The Tesla Parallel: Democratizing Transformation Through Modern Technology

Traditional transformation is like old-school self-driving cars: expensive specialized sensors (consultants), limited adoption (enterprise-only), isolated learning (each project starts from scratch).

EVOLVE replicates Tesla's winning formula for transformation:

1. Commodity Components Replace Expensive Specialists * Uses standard LLMs and vision AI instead of specialized consultants * Edge-first architecture pushes compute to user devices * Massively lowers deployment costs and solves security concerns * Makes enterprise-grade transformation accessible to **millions of SMBs**, not just Fortune 1000

2. Fleet Learning Model Creates Compounding Advantage * Just as Tesla's millions of vehicles make their autopilot smarter every day, EVOLVE's user base creates compounding intelligence * Every workflow captured (anonymously) improves recommendations for everyone * Edge processing preserves privacy while contributing to aggregate intelligence * More users = better benchmarks = smarter recommendations = better outcomes = more users * **This is what consulting can never do:** learn and improve across thousands of companies simultaneously

3. Freemium Adoption Model Eliminates Barriers * Discovery and mining are FREE—not the product, but the on-ramp * Build massive user base contributing workflow intelligence * Monetize transformation execution and continuous improvement * Land-and-expand built into the product experience * **Brings transformation to 150,000+ organizations currently locked out**

The Insight Advantage: What Leaders Desperately Need

Business leaders are starving for competitive intelligence: * "How do my peers in similar companies handle this process?" * "Am I overstaffed or understaffed compared to industry norms?" * "What's the best-practice workflow for this scenario?" * "Where should I focus my transformation efforts for maximum ROI?"

EVOLVE provides the answers no one else can: With thousands of users across industries and platforms, we can show you exactly how your processes compare to peers—not vague benchmarks, but specific, actionable insights mapped to your actual workflows. This intelligence becomes more valuable as our user base grows.

This is the transformation market's "data moat": Once we have thousands of companies contributing anonymized workflow data, competitors can't catch up. Consulting firms have insights from 50-100 clients; we'll have insights from 10,000+ companies.

Perfect Market Timing

Multiple convergent forces make this the right moment:

1. **Agent economy emerging** but companies lack infrastructure to participate (flying blind)
2. **Process intelligence democratizing** through commodity AI components (no longer requires expensive specialists)
3. **Freemium SaaS models proven** in adjacent categories (Slack, Figma, Notion showed the playbook)
4. **Edge AI becoming viable** with improved local LLM performance (solves security and cost)
5. **SMB digital transformation accelerating** post-pandemic (demand is massive)
6. **Economic pressure** driving demand for measurable, rapid ROI (can't afford 6-month consulting projects)
7. **Traditional vendors trapped** in enterprise-only business models (can't pivot to serve millions of SMBs)

Timing-specific opportunity in Salesforce entry wedge: * Salesforce acquired Apromore in 2024; integration timeline ~12 months * Gives us timing window to establish position in Service Cloud SMB market before platform vendor competition * Even after Apromore launches, we win through independence positioning (customers prefer independent layer) and SMB focus (Salesforce targets enterprises first)

Market Opportunity: The Transformation Market

Our Entry Beachhead: Salesforce Service Cloud SMBs

We're starting with a **defined, measurable, defensible beachhead** to prove the model: Salesforce Service Cloud SMBs. This is a tactical entry point, not the full market opportunity.

Salesforce Service Cloud TAM: \$5.4B * **90,000-105,000 Service Cloud customers** globally * **1.2-1.5M customer service agents total** * **Per-agent model:** \$350-400/month × 12 months = \$4,200-4,800/year per agent * **Total market:** 1.2M agents × \$4,500/year = **\$5.4B annually**

Salesforce Service Cloud SAM: \$1.08B (Our Realistic Target)

Filtering for optimal customers: * **Company size:** 20-500 employees (sweet spot for SMB/mid-market) * **Priority verticals:** Technology/SaaS, Professional Services, Financial Services (highest automation ROI) * **Geography:** North America initially (60% of Salesforce customers) * **Service team size:** 5+ agents (minimum for meaningful automation)

Result: ~20,000 target customers with 240,000 agents = **\$1.08B opportunity**

Salesforce Service Cloud SOM: \$71M-\$212M ARR (Years 3-5)

Conservative penetration targets: * **Year 1:** 1% SAM (200 customers, 2,000 agents) = \$8.4M ARR * **Year 3:** 7% SAM (1,400 customers, 16,800 agents) = \$71M ARR * **Year 5:** 18% SAM (3,600 customers, 50,400 agents) = \$212M ARR

Why These Numbers Are Achievable: * AppExchange provides low-CAC distribution (\$200-500 vs. \$5,000+) * Salesforce-native = <1 day deployment vs. weeks for competitors * Simple value

prop: \$375/agent/month to save \$2,400/agent/month = 544% ROI * 12-month head start before Apromore integration * Comparable Salesforce ISVs (Gong, Clari) achieve 3-8% penetration

Expansion Beyond Salesforce (Year 3+):

Once we dominate Salesforce Service Cloud, we expand to: 1. **Sales Cloud** (sales ops automation for existing customers) 2. **ServiceNow** (apply proven model to ServiceNow Service Management) 3. **Zendesk, Microsoft Dynamics** (other service platforms) 4. **Standalone** (companies with custom/multiple systems)

This creates the path to the broader TAM described below.

The Broader Market Opportunity

The EVOLVE opportunity spans two distinct but complementary value pools:

- 1. Technology Spend (Software Displacement)**
- 2. Labor Cost Savings (Human Work Automation)**

Total Technology Spend TAM (Top-Down)

Total Addressable Market (TAM): \$127B by 2030

This represents the converging technology budgets we're targeting:

- **AI Agents Market: \$68B**
 - Gartner projects AI agent platforms reaching \$68B by 2030
 - CAGR: 35%
 - Source: Gartner AI & ML Market Forecast 2024
- **Process Mining Market: \$23B**
 - Process mining and discovery tools
 - CAGR: 33%
 - Source: MarketsandMarkets Process Mining Report 2024
- **RPA Market: \$36B**
 - Robotic Process Automation spending
 - CAGR: 27%
 - Source: Grand View Research RPA Market Analysis 2024

Combined TAM: \$127B (technologies we disrupt or complement)

Serviceable Addressable Market (SAM): \$31B

Filtering for our realistic reach:

Geographic Filter: * US, UK, EU markets (75% of global spend) * $\$127B \times 0.75 = \$95B$

Company Size Filter: * Target: 100-10,000 employees * These represent 60% of technology spend in this category * $\$95B \times 0.60 = \$57B$

Role/Department Filter: * Focus on high-volume, repetitive functions * Sales Ops, Customer Support, Finance Ops, IT Service Mgmt, HR Ops * These functions represent 55% of automation spend * $\$57B \times 0.55 = \$31B$

Our SAM: \$31B (realistic technology market we can capture)

Approach 2: Labor Cost Savings (Bottom-Up)

This is where the real value lies. Businesses don't buy software for its own sake—they buy outcomes. The primary outcome is reducing labor costs while improving quality and speed.

Target Worker Population:

Global Knowledge Workers in Automatable Roles: * Total global knowledge workers: 1.25 billion (ILO data) * In repetitive, process-oriented roles: 25% * **Automatable knowledge workers: 312M globally**

Filtered for Our Market: * US/UK/EU markets: 120M workers (38% of global) * In companies 100-10,000 employees: 48M workers (40% of regional) * In target roles (Sales Ops, Support, Finance, IT, HR): **29M workers**

Value Calculation Per Worker:

Each knowledge worker we help automate creates measurable value:

- **Average fully-loaded cost per knowledge worker:** \$85,000/year
 - Base salary: \$60,000
 - Benefits, taxes, overhead: \$25,000
 - Source: Bureau of Labor Statistics + standard burden rates
- **EVOLVE automation potential:** 40% of work hours
 - Discovery identifies automatable tasks
 - Agents handle 30-50% of repetitive work
 - Conservative estimate: 40% time savings
- **Value created per worker:** \$34,000/year
 - $\$85,000 \times 40\% = \$34,000$ in labor cost savings or redeployment
- **EVOLVE capture rate:** 10% of value created
 - Conservative SaaS pricing: capture 10% of value delivered
 - **Revenue per worker automated:** \$3,400/year

Bottom-Up TAM Validation:

- 29M target workers \times \$3,400 revenue per worker
- **Bottom-up TAM: \$98.6B annually**

This validates our top-down TAM of \$127B □

The technology spend TAM (\$127B) actually understates the opportunity because it doesn't fully account for the labor displacement value. Companies will pay us a fraction of the human labor savings we create.

Deep Dive: SMB Customer Service Market (Our Entry Point)

The SMB Customer Service Workforce:

Small and mid-sized businesses with 100-500 employees represent our most attractive entry point. According to US Census Bureau data:

- **200,000 companies** fall into this size category

- 70-85% maintain formal customer service departments
- **150,000 companies with dedicated support functions** = our serviceable addressable market

Customer Service Staffing at Target SMBs:

For a typical 200-employee company: * Customer service teams: 5-10% of total headcount * **10-20 customer service staff** (conservative midpoint: 14 agents) * Industry standard: one support agent per 70-100 employees

Team Structure (15-person team example): * **67-73% front-line agents:** Junior and senior representatives handling inquiries * **7-13% team leads/supervisors:** One supervisor per 12-13 agents * **7% managers:** Department management * **Director roles:** Often fractional/shared in this company size

Compensation Benchmarks:

Bureau of Labor Statistics (May 2024) data shows:

Role	Base Salary	Fully-Loaded Cost (1.4x)
Junior Rep	\$40,000-\$44,000	\$56,000-\$62,000
Senior Rep	\$50,000-\$57,000	\$70,000-\$80,000
Team Lead	\$60,000-\$70,000	\$84,000-\$98,000
Manager	\$75,000-\$85,000	\$105,000-\$119,000
Director	\$90,000-\$120,000	\$126,000-\$168,000

Fully-loaded cost multiplier of 1.4x includes: * Base salary: 100% * Benefits: 30% (health insurance, retirement, PTO) * Payroll taxes: 10% (Social Security, Medicare, unemployment)

Total Customer Service Department Costs (200-employee company):

Using a realistic 14-person team: * 5 junior reps @ \$58,800 each = \$294,000 * 5 senior reps @ \$72,000 each = \$360,000 * 2 team leads @ \$93,600 each = \$187,200 * 1 manager @ \$115,200 = \$115,200 * 0.5 FTE director @ \$144,000 = \$72,000 * **Total team compensation: \$1,028,400**

Additional operational costs: * Software stack (helpdesk, CRM, phone): \$75,000 * Training and development: \$28,000 * Allocated overhead (facilities, admin): \$70,000 * **Total department cost: \$1,201,400 annually**

This represents 4.0% of a \$30M revenue company—well within industry benchmarks.

Automation Potential:

Multiple research studies (McKinsey, Gartner, Zendesk) converge on: * **60-70% of customer service work is automatable** using current AI * Highly automatable tasks (70-90% potential): * Password resets, order status, basic product info * FAQ responses, ticket routing, data entry * Moderately automatable (40-60% potential): * Basic troubleshooting, refund processing * Appointment scheduling, billing inquiries * Low automation (below 30%): * Complex technical issues, escalated complaints * Highly customized solutions requiring human empathy

Real-world results: * AI chatbots save **2 hours 20 minutes per agent per day** * 52% faster ticket resolution times * 34% improvement in error reduction * 22% of service desk tickets currently automated (rising rapidly)

SMB Customer Service Market Sizing

Total Addressable Market: * 2.1 million customer service workers in 100-500 employee companies * Average fully-loaded cost: \$65,000 * **Total annual labor expenditure: \$136.5 billion** * Including technology, overhead, training: **\$150 billion total department spend**

Software Market Opportunity:

Using multiple approaches:

1. Technology spend method:

- \$50,000-\$100,000 average technology spend per company
- 150,000 target companies
- **Market size: \$11.25 billion**

2. Per-seat pricing method:

- \$100 per agent per month
- 2.1 million workers
- **Market size at 30% penetration: \$7.5 billion**

3. Value-capture method:

- AI saves 30% of \$136.5B labor costs = \$40.9B in savings
- Vendors capture 10-20% of savings
- **Market size: \$4.1-8.2 billion**

Market Validation:

MarketsandMarkets sized the global AI for customer service market at: * **\$12.06 billion in 2024**

* Projected: \$47.82 billion by 2030 (25.8% CAGR) * North American market: 38-40% of global = \$4.6-4.8 billion * SMB segment: 30-40% of North America = **\$1.4-1.9 billion for our target segment**

Detailed Unit Economics: The 200-Employee Company Example

Customer Profile: * 200 employees, \$30M annual revenue * 14-person customer service team * 5,400 support tickets annually (450/month) * Total CS department cost: \$1,201,400 annually

EVOLVE Implementation Scenarios:

Scenario	Automation %	Tickets Automated	FTE Freed	Labor Savings	Total Annual Savings
Conservative 40%	2,160	2.4	\$156,000	\$165,000	
Moderate 50%	2,700	3.0	\$195,000	\$203,000	
Aggressive 60%	3,240	3.6	\$234,000	\$246,000	

Total savings include labor plus reduced operational costs (phone, training, etc.)

Real-World Validation:

- **Klarna:** AI handles 2.3M conversations/month = 700 FTE agents, **45% cost reduction, 800%+ ROI**
- **Charter Communications:** Automated 83% of 200K monthly chats, **300% ROI in 6 months**

- **Microsoft Dynamics 365:** Forrester TEI study showed **315% ROI over 3 years**, \$14.7M economic impact on \$3.54M investment

EVOLVE Pricing for SMB Segment

Value-Based Pricing Tiers:

Tier	Monthly Price	Annual Price	Target Profile	Value Capture
Starter	\$1,500	\$18,000	Up to 200 automated resolutions/mo, 2-3 agent seats	10-15% of value
Professional	\$1,500	\$42,000	Up to 500 resolutions/mo, 5-7 seats, advanced integrations	20-25% of value
Enterprise	\$6,500	\$78,000	Unlimited automation, custom integrations, dedicated CSM	30-35% of value

Comparison to Market:

Current market pricing: * **Outcome-based:** \$0.99-\$2.00 per automated resolution (Intercom Fin, Zendesk AI) * **Seat-based:** \$19-\$155/seat/month base + \$35-\$50/seat for AI add-ons * **Platform fee:** \$500-\$5,000/month depending on volume

Our pricing captures 20-30% of value created vs. legacy vendors charging for technology itself.

Customer ROI Analysis (Professional Tier):

Year One Investment: * Platform cost: \$42,000 * Implementation: \$10,000 * Training/change management: \$8,000 * **Total Year 1 cost: \$60,000**

Year One Returns: * Savings from 50% automation: \$203,000 * **Net benefit: \$143,000** * **ROI: 238%** * **Payback period: 3.5 months**

Ongoing Years (2+): * Annual platform cost: \$42,000 * Annual savings: \$203,000 * **Net annual benefit: \$161,000** * **Ongoing ROI: 383%**

Three-Year Totals: * Total investment: \$144,000 * Total savings: \$609,000 * **Net 3-year benefit: \$465,000** * **3-year ROI: 323%**

Even the conservative 40% automation scenario at \$1,500/month delivers **489% ROI** with 2-month payback.

Serviceable Obtainable Market (SOM): \$300M ARR by Year 5

Our Realistic 5-Year Target:

Starting from \$0.5M ARR in Year 1, reaching \$300M ARR by Year 5 represents:
 * **~1% of SAM** (conservative for category leader)
 * **~0.3% of bottom-up TAM** (extremely conservative)
 * **88,000 workers automated** (assuming \$3,400 average revenue per worker)

Why This Is Achievable:

With our freemium model and SMB-first approach:
 * Year 1: 10,000 free users → 500 paid users → \$0.5M ARR
 * Year 2: 50,000 free users → 5,000 paid users → \$5M ARR
 * Year 3: 200,000 free users → 20,000 paid users → \$20M ARR
 * Year 4: 500,000 free users → 50,000 paid users → \$100M ARR
 * Year 5: 1M free users → 100,000 paid users → \$300M ARR

Market Segmentation by Company Size

Our Target Segments (100-10,000 employees):

Segment	Employee Range	# Companies (US)	Avg Workers per Company	Total Target Workers
SMB	100-500	150,000	250	37.5M
Mid-Market	500-2,000	35,000	1,000	35M
Enterprise	2,000-10,000	8,000	4,500	36M
Total	100-10,000	193,000	-	108.5M

Filtered for Target Roles (Sales, Support, Finance, IT, HR):
 * Target roles represent 27% of total workforce
 * **29M workers in our addressable segments**

Why This Segmentation Matters:

SMB (100-500 employees) - Our Entry Point: * 150,000 companies in US alone * Lower compliance friction (faster sales cycles) * High need for cost efficiency * Traditional vendors ignore this segment (too expensive to serve) * **Our advantage:** Freemium model + edge architecture = viable economics

Mid-Market (500-2,000 employees) - Expansion: * 35,000 companies * Budget for transformation but need proven ROI * Will follow SMB adoption curve * Network effects strongest here (peer comparison value)

Enterprise (2,000-10,000 employees) - Upmarket: * 8,000 companies * Traditional vendor stronghold * Will demand our solution once proven in SMB/mid-market * “Why can’t we use this if it works for smaller companies?” * Highest revenue per customer (\$500K-\$5M+)

Revenue Potential by Segment (at scale):

Segment	Companies	Penetration	Avg ARR	Revenue Potential
SMB	150,000	5%	\$25K	\$187.5M
Mid-Market	35,000	8%	\$150K	\$420M
Enterprise	8,000	3%	\$1.5M	\$360M
Total	193,000	-	-	\$967.5M

Our \$300M Year 5 target = 31% of this potential (highly achievable)

Why This Matters Now

Market Timing

- **Agent economy emerging** but companies lack infrastructure to participate
- **Process intelligence democratizing** through commodity AI components
- **Freemium SaaS models proven** in adjacent categories (Slack, Figma, Notion)
- **Edge AI becoming viable** with improved local LLM performance
- **SMB digital transformation accelerating** post-pandemic
- **Economic pressure** driving demand for measurable, rapid ROI

The SMB Opportunity

Traditional process mining vendors focused exclusively on enterprise because:
* High implementation costs required large contracts to be viable
* Complex integrations only made sense for sophisticated buyers
* Sales cycles and support requirements too expensive for SMB

EVOLVE changes the economics: * Edge-first architecture eliminates implementation costs * Freemium eliminates sales cycle friction * Self-service reduces support burden * **Can profitably serve the 150,000 SMBs traditional vendors ignore**

This is classic **low-end disruption**: We start where incumbents can't follow (SMB), prove value, build scale and intelligence, then move upmarket with overwhelming advantages.

Competitive Advantage: The Unbeatable Moat

We're Playing a Different Game

Dimension	Legacy Vendors (Celonis, UiPath)	Management Consulting (McKinsey)	EVOLVE
Product	Mining technology (expensive)	Human expertise (PowerPoint)	Mining is free, monetize transformation
Entry Market	Enterprise-only	Enterprise-only	SMB-first, then upmarket
Distribution	Enterprise sales (\$200K+ deals)	Relationship-driven	Freemium product-led growth

Dimension	Legacy Vendors (Celonis, UiPath)	Management Consulting (McKinsey)	EVOLVE
Pricing	\$100K-500K per deployment	\$2M+ per engagement	Value-based per-agent (\$350-400/month)
Target Customer	Fortune 1000 only	Fortune 500	Millions of SMBs → Enterprise
Data Strategy	Siloed per customer	Siloed per client	Aggregate learning across users
Architecture	Cloud-based (security concerns)	N/A (human delivered)	Edge-first (privacy-preserving)
Time to Value Intelligence	3-6 months Static analysis	6-12 months Point-in-time insights	<1 week Continuous improvement from fleet
Network Effects	None	None	Peer benchmarking, compounding data moat
Scalability	Linear with sales	N/A (human limited)	Exponential with platform

Why Competitors Can't Catch Up

Salesforce Apromore (Timing Consideration for Entry Wedge):

Salesforce acquired Apromore in 2024. Integration timeline: ~12 months. This creates a timing opportunity in our Salesforce entry wedge, but EVOLVE's strategic advantages extend far beyond Salesforce:

Why we'll succeed regardless of Apromore:

1. **Independence Advantage:**

- Customers prefer independent process intelligence layer over platform vendor (Datadog vs AWS, Slack vs Microsoft Teams)
- EVOLVE works across Salesforce, ServiceNow, Zendesk, custom systems—not locked to one platform
- Apromore will be Salesforce-only, limiting appeal for multi-system companies

2. **SMB Market Segmentation:**

- Salesforce will target enterprises first (where their revenue is)
- Our SMB-first approach captures 44,000-51,000 Service Cloud SMBs they'll ignore
- By the time platform vendors go downmarket, we'll have network effects and established brand

3. **Cross-Platform Network Effects:**

- Our aggregate intelligence spans multiple platforms (not just Salesforce)
- Salesforce data siloed per customer; we aggregate patterns across all systems
- This creates a moat no single platform vendor can replicate

4. Platform-Agnostic Strategy:

- Salesforce is our entry point, not our only market
- Same model applies to ServiceNow, Zendesk, Microsoft Dynamics, standalone systems
- Apromore validates the market need but doesn't threaten our broader platform strategy

Process Mining Vendors (Celonis \$13B, UiPath \$12B, SAP Signavio \$1.2B): * Business model requires \$100K-500K average deal size * Enterprise sales org can't economically serve SMB * Not Salesforce-native (external tools, complex setup) * Siloed customer data means no cross-company learning * Discovery-focused with weak transformation execution * **Can't pivot to Salesforce SMB without destroying economics**

Salesforce Ecosystem Players:

Sales Cloud Focused (Gong, Clari, Outreach): * Focus on Sales Cloud, not Service Cloud (different workflows) * Target mid-market/enterprise, not SMB * Conversation intelligence, not process intelligence * No process mining or agent deployment capabilities * **Wrong product category**

Service Cloud Process Mining (Hubble, elements.cloud): * Lightweight process mining tools on AppExchange * Limited functionality—basic workflow visualization only * No transformation execution or agent deployment * No aggregate intelligence or peer benchmarking * Non-compelling products with limited adoption * **Weak competition in our entry market—validates opportunity exists but poorly served**

Task Mining Vendors (Soroco \$1B+, Kryon/Nintex \$3B): * Expensive specialized sensors limit adoption * Cloud-based architecture raises security barriers * Not Salesforce-native * Static analysis with no aggregate intelligence * **Can't compete on Salesforce AppExchange distribution**

RPA Platforms (UiPath, Automation Anywhere, Blue Prism): * Already committed to RPA-first approach (brittle automations) * Require perfect process definition upfront * No Salesforce-native integration * **Wrong architectural foundation for AI agent economy**

Management Consulting (McKinsey, Bain, BCG): * Human-delivered, not scalable * No network effects or compounding intelligence * Extremely expensive, enterprise-only * **Fundamentally incompatible business model**

EVOLVE's Compounding Moat

1. Data Moat (Compounding over time): * **Workflow Intelligence**: Millions of observed workflows across industries, roles, and platforms * **Pattern Recognition**: Machine learning models trained on aggregate business processes * **Success Metrics**: Real-world data on which transformations work and which don't * **Industry Benchmarks**: Peer comparison data that doesn't exist anywhere else * **Cross-platform insights**: Unique visibility across Salesforce, ServiceNow, Zendesk, and custom systems * **Consulting can't compete**: We learn from 10,000+ companies simultaneously; they learn from 50-100 clients

2. Network Effects (Winner-takes-most): * **More users** → More workflow data → Better recommendations & benchmarks * **Better recommendations** → Higher success rates → More word-of-mouth * **More deployments** → More learning → Smarter agents * **Cross-pollination**: Insights

from one industry benefit adjacent industries * **Platform flywheel**: Each new platform integration (Salesforce, ServiceNow, etc.) makes the network stronger

3. Business Model Moat (Structural advantage): * **Freemium motion**: Creates 10-100x more users than enterprise vendors * **SMB-first economics**: Build scale where competitors can't follow (\$20K deals work for us, not them) * **Per-agent simplicity**: "\$375/agent/month" = transparent, calculable, shareable * **Automated delivery**: Platform scales without linear headcount growth * **Aggregate intelligence**: Creates switching costs (lose peer benchmarks if you leave) * **Competitors trapped**: Legacy vendors can't pivot to freemium without destroying revenue

4. Independence Moat (Customer Preference): * **Platform-agnostic architecture**: Works across all major business process platforms * **Customer trust**: Independent layer preferred over platform vendor control (Datadog vs AWS dynamic) * **No lock-in fear**: Complements existing systems, doesn't replace them * **Multi-vendor optionality**: Not dependent on any single platform's roadmap or pricing

5. Technology Moat (Defensible but commoditizing): * **Edge-first architecture**: Privacy-preserving discovery with local LLM inference * **Multi-layer intelligence**: Across four transformation phases (MINE, DESIGN, DELIVER, MANAGE) * **Shadow mode validation**: Proves agent effectiveness before production deployment * **Process digital twin**: Living model of actual workflows, not imagined processes

6. Entry Market Advantages (Tactical head start): * **Salesforce expertise**: Existing relationships and ecosystem knowledge for fast initial traction * **AppExchange distribution**: Low-CAC customer acquisition (\$200-500 vs. \$5,000+) in entry market * **Service Cloud specialization**: Focused beachhead with weak competition (Hubble, elements.cloud) * **Timing window**: 12-month head start before Salesforce Apromore integration

The result: A data and network flywheel that accelerates while competitors stand still. Every new user makes us stronger across all platforms. The gap widens every day, and no single platform vendor can replicate our cross-platform intelligence.

Business Model: Build the Fleet, Monetize the Value

The Three-Tier Strategy

Free Tier: Build the User Base * Web assessment tool for instant process visibility * Desktop EVOLVE for comprehensive workflow capture * MINE phase: Full discovery and process mapping (unlimited) * Agent opportunity identification and ROI projections * Basic benchmarking against aggregate data * **Business Purpose**: Drive maximum adoption, especially in SMB * **User Value**: "See what's possible before you pay" * **Strategic Goal**: 100,000+ free users contributing to aggregate intelligence

Paid Tier 1: Monetize Transformation (\$500-\$50K/month) * DESIGN phase: AI-powered transformation roadmaps (trained on aggregate data) * DELIVER phase: Autonomous agent authoring and deployment * Token-based consumption pricing (pay only when agents work) * Shadow mode testing and validation * Detailed peer comparison and industry benchmarks * Basic reporting and monitoring * **Business Purpose**: Capture value from transformation execution * **User Value**: "Pay

only when agents deliver value” * **Typical Customer:** SMB to mid-market * **Strategic Goal:** 30-40% free-to-paid conversion over 12 months

Paid Tier 2: Enterprise Platform (\$50K-\$500K+/month) * MANAGE phase: Full service assurance and continuous improvement * Enterprise governance console * Advanced analytics and executive reporting * Multi-team synthesis and optimization * Custom industry benchmarking reports * Priority support and custom integrations * **Business Purpose:** High-margin enterprise expansion revenue * **User Value:** “Transform your entire organization continuously” * **Typical Customer:** Mid-market to enterprise * **Strategic Goal:** 10-15% of Tier 1 customers expand to Tier 2

Why This Model Wins

Versus Legacy Mining Vendors: * They sell mining at \$100K-500K per deployment → limited adoption, enterprise-only * We give mining free → 100x more users → massive aggregate intelligence advantage * They monetize discovery → we monetize transformation (10x more valuable) * They ignore SMB → we dominate SMB, then move upmarket

Versus Freemium SaaS Competitors: * Most freemium tools have weak network effects (documents, projects) * Our network effects are structural—every workflow makes platform smarter * Data moat compounds faster than feature moat * Benchmarking value increases with user base

Versus Enterprise Software: * No large upfront sales cycle → faster time-to-value * Self-service adoption → capital efficient scaling * Usage-based pricing → aligned incentives * SMB-friendly pricing → access to 150,000 ignored companies

Revenue Model Economics

Typical Customer Journey by Segment:

SMB (100-500 employees): * **Month 1-2:** Free (discovery produces “wow” moment) * **Month 3-6:** \$500-\$2,500/month (first agents deployed) * **Month 6-12:** \$2,500-\$10,000/month (team-wide adoption) * **Year 2+:** \$10,000-\$50,000/month (continuous transformation)

Mid-Market (500-2,000 employees): * **Month 1-2:** Free (multiple departments discover value) * **Month 3-6:** \$5,000-\$15,000/month (coordinated deployment) * **Month 6-12:** \$15,000-\$75,000/month (cross-functional adoption) * **Year 2+:** \$75,000-\$200,000/month (enterprise platform features)

Enterprise (2,000-10,000 employees): * **Month 1-6:** Free (extensive proof of value across org) * **Month 6-12:** \$50,000-\$150,000/month (strategic deployment) * **Year 2+:** \$200,000-\$1,000,000/month (organization-wide transformation)

Revenue Multipliers: 1. **SMB volume:** 150,000 companies we can reach (vs. 8,000 enterprises) 2. **Network leverage:** More free users = better product = higher conversion 3. **Usage expansion:** More agents = more token consumption 4. **Peer benchmarking value:** Increases with user base size 5. **Upmarket movement:** SMB success drives mid-market and enterprise demand 6. **Expansion revenue:** Free → Paid Tier 1 → Paid Tier 2 natural progression 7. **Reduced churn:** Continuous improvement + peer insights = lock-in

Unit Economics (at scale): * **CAC:** * SMB: \$100-300 (freemium + product-led growth) * Mid-Market: \$500-1,500 (light-touch sales) * Enterprise: \$2,000-5,000 (traditional sales, but inbound) * **LTV:** * SMB: \$25,000-75,000 (3-4 year retention) * Mid-Market: \$150,000-400,000 (4-5 year

retention) * Enterprise: \$500,000-\$2,000,000 (5+ year retention) * **LTV:CAC**: * SMB: 80-250:1 (exceptional) * Mid-Market: 100-300:1 (exceptional) * Enterprise: 100-400:1 (exceptional) * **Gross Margin**: 80-85% (edge compute reduces infrastructure costs) * **Payback Period**: 2-4 months (freemium model) * **Net Dollar Retention**: * SMB: 110-120% (some churn, moderate expansion) * Mid-Market: 130-150% (strong expansion) * Enterprise: 140-180% (very strong expansion) * **Viral Coefficient**: 0.5-0.8 (peer recommendations, benchmarking sharing)

The Fleet Economics

Cost Structure Innovation: * Edge processing → 70-80% reduction in compute costs vs. cloud * Freemium → acquisition cost near zero for SMB * Aggregate intelligence → product improves automatically * Self-service → minimal sales and support costs for SMB/mid-market

Revenue Structure: * Free tier: 0% of revenue, 100% of aggregate intelligence value * Paid Tier 1: 70-75% of revenue (volume play, especially SMB) * Paid Tier 2: 25-30% of revenue (highest margins, enterprise)

The Magic: * Free SMB users cost almost nothing (edge compute) * But create enormous value (workflow intelligence, benchmarks) * Paid SMB users provide volume revenue * Mid-market and enterprise monetize the aggregate intelligence at premium prices * Every free user increases paid user LTV through better benchmarks

Go-to-Market Strategy: SMB-First, Platform Expansion

Our Tactical Entry Point: Salesforce Service Cloud SMBs

To prove the model and build momentum quickly, we're starting with **Salesforce Service Cloud SMBs**—a market we know well, where we can move fast, and where competition is weak or slow.

Why This Entry Point:

1. **We have existing customers and relationships:** Deep Salesforce ecosystem knowledge and Service Cloud experience
2. **Salesforce sellers become advocates:** They need tools to create clear value and unstick prospects; they've struggled with AgentForce value selling; EVOLVE provides the independent validation layer they need
3. **We can land quickly:** AppExchange provides low-CAC distribution (\$200-500 vs \$5,000+), <1 day deployment
4. **Timing window:** Salesforce acquired Apromore—we have ~12 months to establish position before their integration
5. **Weak competition:** Current Salesforce process mining players (Hubble, elements.cloud) have lightweight, non-compelling products
6. **Underserved SMB segment:** 44,000-51,000 Service Cloud SMB customers ignored by enterprise vendors
7. **Clear value prop:** \$350-400 per agent per month = simple ROI calculation

The Entry Wedge: * **90,000-105,000 Salesforce Service Cloud customers** with 1.2-1.5M service agents * **\$5.4B TAM** within Service Cloud alone * Prove model with SMBs → Expand to mid-

market/enterprise → Apply playbook to ServiceNow, Zendesk, Microsoft Dynamics, standalone systems

This is a tactical entry point, not our strategic positioning. Salesforce gives us a beachhead to prove transformation at scale with modern business model. Once proven, the same playbook applies across any business process platform.

Phase 1: Salesforce Service Cloud SMB Entry (Year 1-2)

Objective: Prove model with 1-7% penetration of Salesforce Service Cloud SMB market (\$8M-71M ARR)

AppExchange Freemium Execution: 1. Free Service Cloud process discovery app on AppExchange 2. Automatic workflow analysis of Service Cloud case data 3. Within 2 weeks: “You can save \$245,000/year by automating 40% of your 10-agent team” 4. Peer comparison: “Similar companies automate 50% vs. your 20%” 5. One-click upgrade to paid tier with token-based agent deployment

Distribution Channels - Multi-Pronged Salesforce Approach:

1. Salesforce Sellers as Advocates & Enablers (Key Channel) * Why Salesforce sellers will champion EVOLVE: * They need ways to create clear value so prospects can get unstuck * They need independent opinions and visibility tools to help prospects move forward * They've struggled with value selling AgentForce (need complementary solutions) * EVOLVE provides the “independent validation” layer that unsticks deals * **Execution:** ISV co-selling program, joint account planning, deal registration * **Value to Salesforce:** Increases Service Cloud stickiness and expansion revenue

2. AppExchange + Viral Ecosystem Marketing * AppExchange: Free offering drives product-led discovery (Featured/Premier listing goal) * **Dreamforce:** Sponsorship, booth presence, speaking opportunities, AppExchange showcase * **Regional events:** Salesforce World Tours, industry-specific Salesforce events * **Community engagement:** Salesforce Success Community, Trailblazer Community, user groups * **Content marketing:** “Service Cloud automation,” “Salesforce AI agents,” case studies

3. Salesforce Partner Ecosystem * Partnerships with Salesforce consultants and system integrators * Referral programs with implementation partners * Co-marketing with complementary AppExchange vendors

Target Customer Personas: * VP Customer Success at Service Cloud customers (100-500 employees) * Customer Service Managers managing 5-25 agent teams * Salesforce Admins looking for native automation solutions * Operations Directors seeking cost efficiency in service delivery

Viral Growth Mechanics: * **Salesforce seller referrals:** Account execs recommend EVOLVE to unstick prospect deals * **AppExchange social proof:** Ratings, reviews, and “Featured” status drive discovery * **Peer benchmarking FOMO:** “Similar companies automate 50% vs. your 20%” creates urgency * **Simple pricing:** “\$375/agent/month” easy to share and calculate * **Community advocacy:** User group discussions (“How are you automating Service Cloud workflows?”)

Success Metrics: * 10,000 AppExchange installs by Month 12 * 200 paying Salesforce SMB customers by Year 1 * Average 10 service agents per customer * **\$8.4M ARR** (Year 1 from Sales-

force Service Cloud) * 30-40% free-to-paid conversion rate * 4.5+ stars on AppExchange with 100+ reviews

Target Verticals (Year 1 Salesforce Focus): 1. **Technology/SaaS** (7,200-8,400 Service Cloud customers): Tech-savvy, fast adoption 2. **Professional Services** (26,000-30,000 customers): High service team needs 3. **Financial Services** (8,700-10,200 customers): Process-heavy, compliance-driven

Phase 2: Salesforce Mid-Market + Sales Cloud Expansion (Year 2-3)

Objective: Expand within Salesforce ecosystem to mid-market and Sales Cloud

Mid-Market Service Cloud Expansion: * Target: 250-1,000 employee companies with 15-40 service agents * 36,000-42,000 mid-market Service Cloud customers available * Deal size: \$63K-168K annually * Sales motion: Freemium discovery + inside sales * Value prop: “Proven with 2,000+ SMB customers, now for your scale”

Sales Cloud Expansion (Existing Service Cloud Customers): * Cross-sell sales operations automation to Service Cloud customers * Target: 1-10 sales ops people per customer * Additional revenue: \$4,200-42,000 per customer annually * Pitch: “You’re already getting value from Service Cloud automation, now automate sales ops” * Natural expansion: Same Salesforce instance, same admin, easy adoption

Value Proposition Evolution: * Year 1 SMB: “Save \$245K/year with 10-agent automation on Service Cloud” * Year 2 Mid-Market: “2,000+ Salesforce customers automated, \$50M in proven savings” * Year 2 Sales Cloud: “Expand from service to sales ops—same platform, instant ROI”

Distribution Evolution: * Continue AppExchange as primary channel * Add Salesforce ISV co-selling program * Inside sales team for \$50K+ deals * Salesforce-focused field marketing events * Dreamforce presence and sponsorship

Success Metrics: * 1,400 paying customers total (Year 3) * Average 12 agents per customer (service + sales ops expansion) * **\$71M ARR** (Year 3 from Salesforce ecosystem) * 500+ mid-market customers, 100+ with Sales Cloud expansion * Salesforce co-sell partnership active

Phase 3: Beyond Salesforce to Other Platforms (Year 3-5)

Objective: Apply proven Salesforce model to ServiceNow, Zendesk, Microsoft Dynamics

Expansion Strategy: * Leverage Salesforce success and network effects * Apply same playbook: Native integration, freemium, per-agent pricing * Target: ServiceNow Service Management customers (similar profile to Service Cloud) * Then: Zendesk, Microsoft Dynamics Service, standalone multi-system companies

Why This Sequence Works: * Prove model completely in one ecosystem (Salesforce) before expanding * Build aggregate intelligence and peer benchmarking data in Year 1-2 * Year 3+: “We’ve automated 50,000+ Salesforce agents, now bringing to ServiceNow” * Investors see repeatable playbook, not single-platform dependency

Platform Expansion Priority: 1. **ServiceNow** (Year 3): Similar enterprise service management market 2. **Zendesk** (Year 4): Mid-market service platform with 100K+ customers 3. **Microsoft**

Dynamics (Year 4-5): Enterprise CRM alternative to Salesforce 4. **Standalone/Multi-system** (Year 5): Companies with custom or multiple systems

Success Metrics: * 3,600 total customers by Year 5 * 50-60% still Salesforce (core strength) * 20-25% ServiceNow expansion * 15-20% other platforms * Average 14 agents per customer * **\$212M ARR** (Year 5 across all platforms)

Distribution Evolution Across All Phases

Year 1: 100% Product-Led Growth (Salesforce AppExchange) * Free AppExchange listing drives all discovery * Self-service onboarding and upgrade * No sales team required * CAC: \$200-500 per customer

Year 2: Freemium + Inside Sales * Continue AppExchange freemium * Add inside sales for \$50K+ mid-market deals * Sales team: 2-3 reps focused on Salesforce leads * CAC: \$200-500 (SMB), \$1,500-3,000 (mid-market)

Year 3-5: Multi-Channel * AppExchange remains primary (60% of leads) * Inside sales (25% of revenue) * Field sales for enterprise (15% of revenue) * Platform partnerships (ServiceNow, Zendesk) * CAC maintains efficiency through product-led motion

Critical Success Factors: The Salesforce Playbook

1. AppExchange Excellence * Featured/Premier listing status * 4.5+ star rating with 500+ reviews by Year 3 * Active in Salesforce Community discussions * Regular feature updates aligned with Salesforce releases

2. Salesforce Partnership * ISV partnership program enrollment * Co-selling with Salesforce account teams * Potential strategic investment or acquisition discussions * Dreamforce sponsorship and demos

3. Salesforce-Native Architecture * Built on Salesforce Platform (Apex, Lightning, Flow) * <1 day implementation for SMB customers * No IT security review required (native = trusted) * Seamless UX within Service Cloud interface

4. Simple Per-Agent Economics * “\$375 per service agent per month” headline message * Instant ROI calculator on AppExchange listing * Transparent pricing, no hidden fees * Scales from 5 agents to 500 agents with same model

5. Vertical Playbooks * Start with Technology/SaaS (fast adopters) * Expand to Professional Services (large volume) * Then Financial Services (high value) * Industry-specific benchmarking creates network effects

Product Roadmap: 18-Month Horizon

Q4 2025: Foundation & SMB Launch

Core Mission: Launch free tier, prove SMB product-market fit

MINE Phase MVP: * Web assessment tool (instant process visibility) * Desktop EVOLVE application (edge-first architecture) * Local LLM inference for workflow capture * Single-user workflow

discovery and timeline * Basic process mapping and visualization * Agent opportunity identification (top 10) * Anonymous contribution to aggregate intelligence * **Basic peer benchmarking** (your metrics vs. aggregate)

SMB-Specific Features: * Simplified onboarding (5 minutes to first insight) * Pre-built templates for common SMB roles * Cost calculator showing potential labor savings * Peer comparison for SMB segments

Metrics: * 5,000 free SMB users * 1,000 web assessments completed * 50,000+ SMB workflows captured * 50 design partners (all SMB) * Average 2+ peer invitations per user

Q1 2026: Intelligence & Monetization

Core Mission: Launch paid tiers, prove SMB conversion

DESIGN + DELIVER Phases: * AI-powered transformation analysis (trained on aggregate SMB data) * Effort vs. impact matrices (success patterns from similar companies) * Executable transformation roadmaps * Autonomous agent authoring from observed workflows * Shadow mode validation system * Token-based billing infrastructure * **Enhanced peer benchmarking** (detailed industry comparisons)

SMB Conversion Features: * Self-service checkout (no sales call required) * \$500-2,500/month pricing tiers * ROI calculator showing labor cost savings * Case studies from similar SMB companies

Metrics: * 15,000 free users (12K SMB, 3K mid-market) * 100 paying SMB customers * \$250K MRR (\$200K SMB, \$50K mid-market) * 25+ agents running in SMB production * 30% free-to-paid conversion rate (SMB)

Q2 2026: Scale & Mid-Market Entry

Core Mission: Prove mid-market value, scale to \$1M MRR

MANAGE Phase: * Real-time process performance monitoring * Service assurance dashboards * Automated executive reporting * Continuous improvement recommendation engine * Multi-user workflow synthesis * Team and department governance tools * **Advanced industry benchmarking** (20+ industries covered)

Mid-Market Features: * Department-level analytics and governance * Custom benchmark reports for executives * Integration with enterprise tools (Salesforce, ServiceNow) * Light-touch sales support for \$50K+ deals

Metrics: * 40,000 free users (30K SMB, 10K mid-market) * 500 paying SMB customers, 100 paying mid-market customers * \$1M MRR (\$500K SMB, \$500K mid-market) * 200+ agents in production * First \$100K annual contract (mid-market) * Peer benchmark data covering 20+ industries

Q3-Q4 2026: Enterprise Platform & Series A

Core Mission: Launch enterprise tier, achieve Series A metrics

Enterprise Platform: * Enterprise governance console * Advanced analytics and insights * Cross-functional process optimization * Custom integrations framework * SOC 2 Type II certification * Strategic advisory services * **Enterprise benchmarking suite** (competitive intelligence reports)

Enterprise Features: * Multi-tenant security and governance * Custom SLA and support * Dedicated customer success management * Integration with enterprise process mining tools (migration path)

Metrics: * 100,000 free users (70K SMB, 25K mid-market, 5K enterprise) * 2,000 paying SMB, 500 paying mid-market, 20 paying enterprise * \$6M ARR (\$2M SMB, \$2.5M mid-market, \$1.5M enterprise) * 1,000+ agents in production * Aggregate intelligence = #1 differentiator * 130%+ net dollar retention * Series A ready

Team Structure and Compensation

Founding Team (Current)

CEO - Vision, strategy, fundraising, enterprise relationships * Salary: \$147,000 (seed-stage average per Kruze Consulting 2025) * Equity: 20-30% (co-founder) * Board management and investor relations * Market positioning and competitive strategy (SMB disruption narrative) * Strategic partnerships and ecosystem development * Category creation and thought leadership

Product Owner (Platform Architect) - Product strategy, UX, aggregate intelligence * Salary: \$133,000-134,000 (founding CTO level) * Equity: 15-25% (co-founder) * EVOLVE platform vision and roadmap * Aggregate learning system architecture * AI/ML strategy and peer benchmarking systems * User experience and product-market fit (SMB focus)

Technical Lead - Engineering execution, edge architecture, scalability * Salary: \$110,000-180,000 (based on experience/location) * Equity: 0.5-2.0% (early technical lead) * Platform development and system architecture * Edge-first LLM implementation * Privacy-preserving aggregate intelligence systems * DevOps, infrastructure, security

Phase 1 Team (Months 1-6) - SMB Launch

Target team size: **8-12 people**

ML Engineer - Aggregate intelligence and benchmarking * Salary: \$120,000-200,000 (avg \$159,000) * Equity: 0.4-1.5% * Pattern analysis across workflows * Peer benchmarking algorithms * Recommendation engine development * Model training and optimization

Growth Lead - SMB-focused product-led growth * Salary: \$95,000-165,000 (median \$128,000) * Equity: 0.3-1.0% * Freemium funnel optimization for SMB * Content strategy and SEO (SMB-focused) * Community building (SMB industry associations) * Distribution partnerships (SMB software ecosystem)

Operations Lead - SMB customer success * Salary: \$85,000-145,000 * Equity: 0.5-1.5% * SMB onboarding and activation (self-service focus) * Free-to-paid conversion optimization * Community management and support * Usage analytics and health monitoring

Additional Hires (2-3 engineers, 1 designer, 1 customer success): * Full-stack/Backend Engineers: \$100,000-145,000, 0.4-1.0% equity (declining) * Product Designer/UX: \$110,000-160,000, 0.3-0.8% equity * Customer Success Specialist: \$60,000-90,000, 0.2-0.5% equity

Phase 1 Monthly Burn: \$60,000-90,000 (5-7 FTEs at 1.4x multiplier)

Phase 2 Team (Months 7-12) - Mid-Market Expansion

Target team size: **12-18 people**

Key Additions: * Senior ML Engineer: \$120,000-200,000, 0.3-0.7% equity * Inside Sales Lead: \$80,000-100,000 base + \$130,000-160,000 OTE, 0.2-0.5% equity * Developer Advocate: \$100,000-150,000, 0.2-0.6% equity * Customer Success Manager: \$70,000-100,000, 0.2-0.5% equity * 2-3 Additional Engineers: \$100,000-150,000, 0.2-0.6% equity * Marketing Manager: \$100,000-140,000, 0.3-0.7% equity * Data Analyst/Engineer: \$90,000-130,000, 0.2-0.5% equity

Phase 2 Monthly Burn: \$100,000-140,000 (12-18 FTEs)

Phase 3 Team (Months 13-24) - Enterprise Platform

Target team size: **25-35 people**

Leadership Layer: * VP Engineering: \$180,000-250,000, 0.5-1.5% equity * VP Sales: \$150,000-200,000 base + \$250,000-350,000 OTE, 0.5-1.5% equity * Head of Product: \$160,000-220,000, 0.5-1.2% equity * Head of Marketing: \$140,000-190,000, 0.4-1.0% equity

Individual Contributors: * 5-7 Additional Engineers: \$100,000-160,000, 0.1-0.3% equity * 3-4 Sales Representatives: \$80,000-110,000 + commission, 0.1-0.3% equity * 2-3 Customer Success: \$70,000-95,000, 0.1-0.3% equity * 2 Marketing Specialists: \$70,000-110,000, 0.1-0.3% equity * Finance/Accounting Support: \$70,000-95,000, 0.1-0.2% equity

Phase 3 Monthly Burn: \$180,000-250,000 (25-35 FTEs)

Total Compensation Multiplier: 1.4x

Breakdown: * Base salary: 100% * Benefits (30%): * Healthcare: \$8,435-\$23,968 per employee annually * 401(k) matching: 3-4% of salary * Payroll taxes: 10% (Social Security 6.2%, Medicare 1.45%, unemployment 3-4%) * PTO: 15-20 days * Overhead (10%): * Technology/tools: \$3,000-8,000 per year * Hardware: \$2,000-3,500 upfront + \$500 annual refresh * HR/admin software: \$1,200-2,400 per employee per year

Example: Engineer with \$120,000 base = **\$168,000 fully-loaded annual cost**

Advisors

Part-time CFO - Financial modeling, unit economics, investor relations * Compensation: \$5,000-10,000/month or 0.1-0.25% equity

Part-time Legal Counsel - IP protection, data privacy, contracts * Compensation: Hourly or retainer + 0.05-0.15% equity

Technical Advisors - Edge AI, LLMs, SaaS scaling * Compensation: 0.1-0.25% equity each

Industry Advisors - SMB operations, low-end disruption strategy, enterprise sales * Compensation: 0.1-0.25% equity each

Capital Requirements and Infrastructure Costs

Infrastructure Costs

Cloud Infrastructure (Months 1-12, 10-30 customers): * Base infrastructure: \$500-1,000/month * Database hosting: \$200-500/month * Storage: \$100-300/month * CDN and networking: \$100-200/month * Security/monitoring: \$200-400/month * **Total: \$1,100-2,400/month** (\$13,200-28,800/year)

LLM API Costs (with optimization):

Current pricing (November 2025): * GPT-4o mini: \$0.15/\$0.60 per million tokens * Claude 3.5 Haiku: \$0.25/\$1.25 per million tokens * Claude 3.5 Sonnet: \$3.00/\$15.00 per million tokens * Gemini 1.5 Flash: \$0.075/\$0.30 per million tokens

Per conversation cost (7 exchanges, ~7,000 tokens): * Budget models: \$0.004-0.01 per conversation * Mid-tier models (Sonnet, GPT-4o): \$0.08-0.15 per conversation

Volume scaling: * Months 1-6 (2,000-4,000 conversations/month): \$150-600/month * Months 7-12 (4,000-8,000 conversations/month): \$300-1,200/month * Months 13-18 (8,000-15,000 conversations/month): \$900-2,250/month * Months 19-24 (15,000-25,000 conversations/month): \$1,700-3,750/month

Cost optimization strategies: * Prompt caching: 90% cost reduction on repeated context * Tiered models: Use budget models for simple tasks * Cache hit rates: 60-70% after month 6

Year 1 LLM costs: \$5,400-10,800 Year 2 LLM costs: \$18,000-27,000

Additional Infrastructure Tools: * Monitoring/logging (Datadog, New Relic): \$200-500/month * Security/compliance tools: \$150-400/month * Development tools: \$50-200/month * **Total: \$400-1,100/month** (\$4,800-13,200/year)

Total Infrastructure: * **Year 1: \$23,400-52,800 Year 2: \$42,600-98,400**

Go-to-Market Investment

Marketing Software Stack: * CRM: \$0-50/month (HubSpot free tier, then \$50/mo) * Email marketing: \$15-100/month * Website/landing pages: \$16-50/month * Analytics: \$0-200/month * SEO tools: \$30-100/month * Social media management: \$20-100/month * Design tools: \$15-45/month * Marketing automation: \$50-200/month * **Total: \$150-800/month** (\$1,800-9,600/year)

Active Marketing Programs:

Months 1-6: * Content creation: \$2,000-4,000/month * Paid advertising testing: \$1,000-3,000/month * Events/conferences: \$500-2,000/month * Tools: \$150-800/month * **Total: \$22,000-59,000 for 6 months**

Months 7-12: * Content creation: \$3,000-6,000/month * Paid acquisition: \$2,000-5,000/month * Events/outbound: \$1,000-3,000/month * Tools: \$300-1,000/month * **Total: \$38,000-90,000 for 6 months**

Year 1 GTM Total: \$60,000-149,000 Year 2 GTM (8-12% of \$500K-\$2M ARR or \$10K-20K/month): \$120,000-240,000

Operating Expenses

Legal & Incorporation: * Entity formation: \$500-2,000 (one-time) * Contract/terms creation: \$2,000-5,000 (one-time) * IP protection: \$1,000-3,000 (one-time) * Ongoing legal counsel: \$500-2,000/month (\$6,000-24,000/year) * Compliance (GDPR, privacy): \$5,000-20,000 setup + \$2,000-5,000/year

Accounting & Finance: * Bookkeeping: \$200-500/month * Accounting software: \$50-200/month * Annual tax preparation: \$2,000-5,000 * **Year 1 Total: \$5,000-15,000 Year 2 Total: \$10,000-30,000**

Insurance: * General liability: \$500-2,000/year * Professional liability/E&O: \$1,000-3,000/year * Cyber insurance: \$1,000-3,000/year * Workers' comp: \$500-2,000 per employee * **Year 1 Total: \$3,000-10,000 Year 2 Total: \$5,000-15,000**

Office & Tools (Remote-First): * Productivity tools: \$200-500/month * Computer equipment: \$2,000-3,000 per employee (one-time) * Remote work stipends: \$100-300 per employee per month * Co-working/meeting spaces: \$500-2,000/month * **Year 1 Total: \$15,000-35,000 Year 2 Total: \$20,000-45,000**

Total Operating Expenses: * **Year 1: \$91,500-213,600 Year 2: \$155,000-330,000**

Consolidated Capital Requirements

12-Month Runway:

Scenario	Team	Infrastructure	GTM	Operating	Subtotal	Buffer (15-20%)	Total
Conservative	\$600,000	\$23,400	\$60,000	\$91,500	\$774,900	\$116,235	\$891,135
Moderate	\$840,000	\$38,100	\$104,500	\$152,400	\$1,135,000	\$170,250	\$1,305,250
Aggressive	\$1,080,000	\$52,800	\$149,000	\$213,600	\$1,495,400	\$299,080	\$1,794,480

Recommended 12-month fundraising target: \$1.0-1.5M

24-Month Runway:

Scenario	Year 1	Year 2	Subtotal	Buffer (20%)	Total
Conservative	\$775,000	\$1,218,000	\$1,993,000	\$398,600	\$2,391,600
Moderate	\$1,135,000	\$1,648,500	\$2,783,500	\$556,700	\$3,340,200
Aggressive	\$1,496,000	\$2,348,000	\$3,844,000	\$768,800	\$4,612,800

Recommended seed round size: \$2.5-3.5M

This provides 24-30 months of runway at moderate burn rates, aligning with:
* US seed rounds: \$2.5-3.2M median * AI startup premium: 20-30% → **\$3.0-4.0M**

Critical Success Metrics

Burn Efficiency: * **Burn multiple** (net burn ÷ net new ARR): Target <2.0x * Months 1-12: \$65,000-125,000 monthly net burn * Months 13-24: \$100,000-190,000 monthly net burn

Series A Readiness Metrics (Month 22-24): * **ARR: \$1.5-3.0M minimum** (requirement increased from \$1M in 2021) * **YoY growth: 100%+** * **Net revenue retention: 105-120%** * **Gross revenue retention: >90%** * **CAC payback: <18 months** * **LTV:CAC ratio: 3:1 to 5:1** * **Rule of 40: 40%+ minimum** (growth % + profit margin %) * **Customer concentration: <20% from single customer** * **Gross margin: 70%+**

Series A Economics: * **Typical raise: \$10-15M** (standard SaaS) * **AI startup raise: \$10-20M** * **Post-money valuation: \$35-75M** (standard), **\$45-90M** (AI premium)

Funding Requirements

Current Round: Seed Extension (\$2-3M)

Use of Funds (18-24 month runway to Series A):

- 1. Team Costs (55-60%): \$1.4-1.8M** * Competitive salaries for core team (5-7 founding members)
* SMB-focused growth and engineering hires (months 1-12) * Leadership layer additions (months 13-24) * Advisory compensation * Recruiting costs
- 2. Infrastructure & Operating Costs (20-25%): \$500-750K** * Edge LLM development and optimization
* Aggregate intelligence infrastructure * Cloud compute for data aggregation (minimal due to edge architecture) * Security and privacy infrastructure * DevOps and monitoring * Legal, accounting, insurance
- 3. Go-to-Market (15-20%): \$375-600K** * SMB-focused product-led growth infrastructure * Content marketing and SEO (SMB audience) * Community building and SMB partnerships * Design partner program (100% SMB focus initially) * Free tier infrastructure (optimized for low cost) * Sales enablement (mid-market, months 7+)
- 4. R&D / Product Development (5-10%): \$125-300K** * Advanced benchmarking capabilities * Peer comparison algorithms * Platform integrations (SMB tools first) * Security and compliance features * Agent authoring system

Key Milestones (Next 24 Months)

Month 3: SMB Foundation * 5,000 free SMB users actively contributing * 50 SMB design partners validating product-market fit * First peer benchmarking data deployed * Product-market fit in 2 SMB segments (Customer Support, Sales Ops)

Month 6: SMB Monetization Proof * 15,000 free users (80% SMB) * 100 paying SMB customers * \$250K MRR * 30% free-to-paid conversion proven (SMB) * Peer benchmarking measurably driving conversions

Month 9: Mid-Market Entry * 25,000 free users (70% SMB, 30% mid-market) * 500 paying customers (400 SMB, 100 mid-market) * \$750K MRR * First \$100K annual contract (mid-market) * Benchmark data covering 15+ industries

Month 12: Scale Proof * 50,000 free users across SMB and mid-market * 1,500 paying customers * \$1.5M MRR * Clear SMB → mid-market → enterprise path * Path to \$10M ARR demonstrated

Month 18: Series A Ready * 100,000 free users across all segments * 3,000+ paying customers (2K SMB, 800 mid-market, 200 enterprise) * \$6M ARR run rate * 20+ enterprise customers * Category leadership in SMB/mid-market * 130%+ net dollar retention * Clear path to \$50M ARR

Revenue Projections (by segment)

Conservative Case: * Year 1: \$1M ARR (750 customers: 600 SMB, 125 mid, 25 ent) * Year 2: \$5M ARR (2,500 customers: 2,000 SMB, 400 mid, 100 ent) * Year 3: \$20M ARR (7,000 customers: 5,000 SMB, 1,500 mid, 500 ent) * Year 4: \$60M ARR (15,000 customers: 10,000 SMB, 3,500 mid, 1,500 ent) * Year 5: \$150M ARR (25,000 customers: 15,000 SMB, 7,000 mid, 3,000 ent)

Target Case: * Year 1: \$2M ARR (1,000 customers: 800 SMB, 150 mid, 50 ent) * Year 2: \$10M ARR (4,000 customers: 3,000 SMB, 750 mid, 250 ent) * Year 3: \$40M ARR (10,000 customers: 7,000 SMB, 2,250 mid, 750 ent) * Year 4: \$120M ARR (20,000 customers: 13,000 SMB, 5,000 mid, 2,000 ent) * Year 5: \$300M ARR (35,000 customers: 20,000 SMB, 10,000 mid, 5,000 ent)

Aggressive Case: * Year 1: \$3M ARR (1,500 customers: 1,200 SMB, 225 mid, 75 ent) * Year 2: \$20M ARR (6,000 customers: 4,500 SMB, 1,125 mid, 375 ent) * Year 3: \$80M ARR (15,000 customers: 10,500 SMB, 3,375 mid, 1,125 ent) * Year 4: \$250M ARR (30,000 customers: 19,500 SMB, 7,500 mid, 3,000 ent) * Year 5: \$600M ARR (50,000 customers: 30,000 SMB, 14,000 mid, 6,000 ent)

Key Assumptions: * SMB average ARR: Year 1: \$20K → Year 5: \$30K (expansion) * Mid-market average ARR: Year 1: \$75K → Year 5: \$150K (expansion) * Enterprise average ARR: Year 1: \$200K → Year 5: \$500K (expansion) * Network effects accelerate as user base scales * Peer benchmarking value increases with each cohort * Each segment drives adoption in segment above

The Investment Opportunity

Why EVOLVE Wins

1. SMB-First Disruption = Unassailable Position * 150,000 SMB companies completely ignored by traditional vendors * Build massive user base where competitors can't follow * Prove model with fast-moving, high-volume segment * Move upmarket with overwhelming advantages

2. Network Effects = Compounding Moat * Every user makes platform smarter for everyone * Peer benchmarking value increases exponentially with users * Data advantage compounds daily * Winner-takes-most market dynamics

- 3. Business Model Innovation = Category Dominance** * Freemium mining builds user base 100x faster than competitors * Edge architecture eliminates security barriers and reduces costs * Monetize transformation and labor savings, not discovery * Capital-efficient scaling to market leadership
- 4. Structural Cost Advantage = Superior Economics** * Edge compute = 70-80% lower infrastructure costs * Freemium = near-zero customer acquisition cost for SMB * Aggregate intelligence = product improves automatically * 80-85% gross margins vs. 60-70% for competitors
- 5. Two-Sided Value Capture = Massive TAM** * Technology spend TAM: \$127B (software we disrupt/complement) * Labor savings TAM: \$98B (human work we automate) * We capture 10% of labor value created = massive revenue opportunity
- 6. Perfect Market Timing** * Agent economy emerging, infrastructure missing * SMB digital transformation accelerating post-pandemic * Traditional vendors stuck in enterprise-only models * Edge AI now viable with local LLMs * Network effects now understood as ultimate moat

What We're Building Toward

Near-term (2-3 years): * Dominant SMB and mid-market transformation platform * 500,000-1M free users contributing intelligence * 10,000-20,000 paying customers * \$50M-100M ARR * Category-defining peer benchmarking and process intelligence

Long-term (5-7 years): * The nervous system for business transformation across all segments * 2-5M users in the network * Infrastructure layer for the agent economy * \$300M-\$1B+ ARR * 30,000-50,000 paying customers * Platform ecosystem and marketplace * Strategic acquisition target (\$5-15B valuation) or IPO candidate

Comparable Companies & Validation

Process Mining Success (Enterprise-Only, No Network Effects): * Celonis: \$13B valuation, \$1B+ ARR (3,000 enterprise customers) * UiPath: \$12B valuation, \$1B+ ARR (10,000+ customers but broader than process mining) * **Our advantage:** 10x more customers (SMB volume) + network effects = 2-3x higher multiples

SMB-First SaaS Winners: * Atlassian: \$50B valuation (IPO path, SMB to enterprise) * Zoom: \$20B valuation (freemium, SMB viral adoption, moved upmarket) * Shopify: \$70B valuation (SMB e-commerce platform, network effects) * **Our parallel:** Start SMB, prove model, massive scale, then enterprise

Network Effect SaaS Winners: * Figma: \$20B acquisition at 40x ARR (design network effects) * Snowflake: \$70B valuation (data network effects) * Waze (Google): Acquired for \$1.3B (map network effects) * **Our parallel:** Workflow intelligence network effects + peer benchmarking

Our Wedge: * Traditional vendors sell to 8,000 enterprises at \$100K-500K each * EVOLVE sells to 150,000 SMBs + 35,000 mid-market + 8,000 enterprises * We reach 24x more companies with freemium + network effects * We capture labor savings value (not just software spend) * **Result:** Larger revenue opportunity + stronger moat + premium valuation

The Unique Investment Thesis

This is not a “better process mining” investment.

This is a low-end disruption + network effects platform play: * Start where incumbents can't compete (SMB) * Build massive user base with freemium economics * Create compounding data moat from aggregate intelligence * Provide peer insights no one else can (benchmarking advantage) * Move upmarket with overwhelming competitive advantages * Dominate category through winner-takes-most dynamics

The opportunity: * The SMB process intelligence market doesn't exist (created by us) * The peer benchmarking data doesn't exist (created by our network) * The work automation network doesn't exist yet (we're building it) * Whoever builds it first owns the category

The Ask

We're raising \$2-3M in seed extension funding to execute the SMB disruption playbook and build unassailable market position.

This capital will enable us to: * Build and scale the edge-first mining platform optimized for SMB * Acquire 100,000 free users (70%+ SMB) contributing to aggregate intelligence * Prove 30%+ free-to-paid conversion in SMB segment * Develop peer benchmarking and industry comparison capabilities * Launch paid tiers and achieve \$1.5M MRR * Position for strong Series A (\$6M+ ARR, clear path to \$50M ARR)

Why invest now:

Timing: Window to build SMB user base before competitors understand the model

Market: \$127B technology TAM + \$98B labor savings TAM, but we're starting where nobody else can compete

Disruption: Classic low-end disruption playbook proven by Atlassian, Zoom, Shopify

Network Effects: True winner-takes-most dynamics through aggregate intelligence and peer benchmarking

Business Model: Proven freemium playbook + structural cost advantages + SMB economics

Team: Technical depth in edge AI, aggregate intelligence systems, and SMB go-to-market

Traction: Clear 18-month path to Series A with measurable milestones by segment

The opportunity: Just as Tesla built a fleet that made every car smarter, and Waze built a network that made every driver smarter, we're building a network that makes every business transformation more successful.

Every company—from 100-employee SMBs to 10,000-employee enterprises—will need to transform continuously. We're building the platform that makes that possible, starting where the incumbents can't follow, and capturing the peer intelligence that doesn't exist anywhere else.

We're not disrupting process mining. We're democratizing business transformation and creating a new category: peer-powered process intelligence.

Contact

[Your Name] CEO, EVOLVE [email@evolve.ai] [Schedule a demo: calendly.com/evolve]

Appendix A: Detailed Market Research Citations

SMB Market Data Sources:

- US Census Bureau - Statistics of US Businesses (2024)
- Bureau of Labor Statistics - May 2024 Occupational Employment Statistics
- BLS - Employer Costs for Employee Compensation (2024)
- CompanySights - B2B SaaS Benchmarks
- SaaStr - Customer Service Staffing Ratios

Automation Potential Research:

- McKinsey Global Institute - “The State of AI in 2024”
- Gartner - “Forecast: AI for Customer Service, Worldwide, 2024”
- Zendesk - “Customer Experience Trends Report 2024”
- Forrester - “Total Economic Impact of Microsoft Dynamics 365 Customer Service”

Market Sizing Sources:

- MarketsandMarkets - “AI in Customer Service Market Report 2024”
- Grand View Research - “RPA Market Analysis 2024”
- Gartner - “AI & ML Market Forecast 2024”

Compensation Benchmarks:

- Kruze Consulting - “Startup CEO & CTO Salary Report 2025”
 - Bureau of Labor Statistics - “Employee Benefits Survey 2024”
 - Carta - “Equity Compensation Benchmark Study 2024”
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Appendix B: Competitive Landscape Deep Dive

Process Mining Category (Enterprise-Only Players)

Celonis (\$13B valuation, \$1B+ ARR) * Business model: Sell mining technology at \$100K-500K per deployment * Target market: Enterprise only (Fortune 1000) * Customer count: ~3,000 (almost entirely enterprise) * Strengths: Enterprise relationships, complex analytics * Weaknesses: Can't economically serve SMB, siloed data, no peer benchmarking, no transformation execution * **Our advantage:** 150,000 SMB market they ignore + aggregate intelligence + peer benchmarking + monetize transformation

UiPath Process Mining (part of \$12B company) * Business model: RPA-first with process mining bolt-on * Target market: Enterprise (RPA buyers) * Strengths: RPA integration, large customer base * Weaknesses: RPA-centric mindset, brittle automations, enterprise sales only, no aggregate learning * **Our advantage:** Agent-first, SMB to enterprise, continuous learning, peer insights

SAP Signavio (acquired for \$1.2B) * Business model: Enterprise process modeling and mining * Target market: SAP enterprise customers * Strengths: SAP integration, enterprise credibility * Weaknesses: Legacy architecture, manual mapping, expensive, SAP-centric, no SMB presence * **Our advantage:** Modern edge AI, automatic discovery, SMB to enterprise, aggregate intelligence

Salesforce Apromore (recently acquired) * Business model: Salesforce-native process mining * Target market: Salesforce enterprise customers * Strengths: Salesforce integration, platform play * Weaknesses: Salesforce-only, early integration, traditional pricing, enterprise focus, no cross-company intelligence * **Our advantage:** Multi-system support, SMB to enterprise, network effects, broader vision

Task Mining Category (Enterprise-Only Players)

Soroco (\$1B+ valuation) * Business model: Enterprise task mining with work graph technology * Target market: Large enterprise only * Strengths: Strong analytics, work graph visualization * Weaknesses: Expensive sensors, cloud-based (security concerns), enterprise-only, no network effects, no transformation execution * **Our advantage:** Edge architecture, SMB to enterprise, aggregate intelligence, full transformation lifecycle

Kryon (Nintex) (\$3B company) * Business model: RPA with task mining * Target market: Mid-market to enterprise * Strengths: RPA legacy, process discovery * Weaknesses: RPA limitations, cloud monitoring, no continuous improvement, no network learning, limited SMB presence * **Our advantage:** AI agents over RPA, edge processing, SMB first, learning loops, aggregate intelligence

Why No One Can Compete in SMB

Legacy Vendors Can't Serve SMB: * Average deal size: \$100K-500K (SMB can't afford) * Sales model: Enterprise field sales (\$50K+ cost per customer) * Implementation: Requires consultants and integration partners * Cloud architecture: Security concerns, high compute costs * **Economics simply don't work at \$10K-50K deal sizes**

Startups Can't Build Network Fast Enough: * Network effects require massive scale * Need years to accumulate workflow intelligence * First mover advantage in SMB market * We're building the network now—by the time they try, insurmountable lead

Tech Giants Could (But Won't): * Microsoft, Salesforce, Google could build networks * But SMB process mining isn't strategic to their core * Would require dedicated go-to-market and product focus * Acquisition more likely than build (we're the acquisition target)

The Disruption Timeline

Year 1: SMB Dominance * EVOLVE: 50,000 SMB users, network effects visible, \$1-2M ARR * Competitors: Unaware or dismissive ("SMB isn't our market")

Year 2: Mid-Market Threat * EVOLVE: 200,000 users, mid-market traction, \$10-20M ARR, peer benchmarking = killer feature * Competitors: Beginning to understand threat, attempting SMB plays (failing due to cost structure)

Year 3: Enterprise Encroachment * EVOLVE: 500,000+ users, enterprise wins, \$50-100M ARR, category leader * Competitors: Attempting network strategies (too late, can't change business model), acquisition discussions

Year 4-5: Category Ownership * EVOLVE: 1-2M users, \$200-300M ARR, de facto standard for SMB/mid-market, strong enterprise presence * Competitors: Acquisition or irrelevance

The result: EVOLVE becomes the work automation platform across all segments. We own the SMB and mid-market categories entirely, and compete strongly in enterprise with overwhelming advantages from scale, aggregate intelligence, and peer benchmarking capabilities.