

# Delivery Strategy, WBS & Appendices

Work Breakdown Structure, acceptance criteria, transition plan, compliance matrix, and supporting appendices for the RealizeAI Value platform — delivered as a Build + Operate engagement. Updated for Developer Brief V2.0 with V4 hosting-first pricing (17 MVP tools, Categories 1–2).

**Methodology:** Agile-Sprint (2-week cycles)

**Duration:** 5 Days (1 Week)

**MVP Tools:** 17 (Cat 1: 3, Cat 2: 14)

**Model:** 1 Architect + 13 AI Agents

**Date:** 24 March 2026



## INTERACTIVE COMPANION

### Volume IV: Delivery & Appendices

WBS, delivery timeline, acceptance checklists, BRD compliance matrix, tool catalog, and glossary.

<https://proposal-viewer-42380604425.us-central1.run.app/p/a89dc9963e81194a/vol4>

## Work Breakdown Structure (WBS)

WBS #	WORK ELEMENT	SPRINT	ACCEPTANCE CRITERIA
1.0	Phase 1A: Category 1 + Foundation	S1–S3	3 Cat 1 tools live, platform foundation, payments processing, Form-Before-Download, OpenAI PDF pipeline deployed at realizeaivalue.com
1.1	Foundation & Infrastructure	S1	Supabase schema (8 tables) + RLS deployed; Stripe checkout (singles/bundles/annual); auth flow; CI/CD pipeline; RealizeAI design system
1.2	User Journey & Navigation	S2	Persona Mirror + Category Hub (6 categories, 2 active, 4 “Coming Soon”) + category detail pages + Form-Before-Download system + cart/checkout
1.3	Category 1 Tools + PDF Pipeline + Launch	S3	TRM (scoring + zone classification + OpenAI PDF); 3P Alignment Audit (15Q + radar PDF); Swamp Draining Reality Check; legal docs; security audit; Cat 1 go-live
2.0	Phase 1B: Category 2 + Full MVP	S4–S7	All 17 MVP tools live, benchmarking, email, analytics, admin dashboard, full platform launch
2.1	Cat 2 Scoring + First Templates (5 tools)	S4	Pilot Purgatory Audit; Antibody Audit; Master AI Initiative Charter; 4 Laws Template; Requirement Gathering Template
2.2	Cat 2 Templates + Benchmarking (5 tools)	S5	Risk Register; CFO Drift Planner; Macro YoY P&L; 90-Day RACI; benchmarking data pipeline
2.3	Cat 2 Guides + Email + Book (5 tools)	S6	3-Key Vault; 30 Pearls; 90-Day Roadmap; Build vs Buy; Procurement Red-Flag; SendGrid email; book integration; promo codes
2.4	Analytics + QA + Full Launch	S7	Admin analytics dashboard; feedback system; full MVP security audit (17 tools); performance tuning; mobile QA; production deployed

**Agent-Accelerated Timeline:** The 5-day sprint timeline (vs. 20 weeks traditional) is achievable because BFI's AI agent fleet handles ~83% of work that would require separate specialists — code scaffolding, QA automation, CI/CD, design generation, and documentation. John Lewis focuses exclusively on architecture, business logic, and quality review. Infrastructure is pre-scaled to handle 1,000 concurrent users before the first customer hits staging. See Volume III for the detailed Basis of Estimate.

## Delivery Timeline

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Engagement starts upon contract execution. Target start: **Week of March 24, 2026**. All dates are business-week estimates.

- **WEEK 1–2 · SPRINT 1**  
**Foundation Build**  
Supabase schema (8 tables + RLS), Stripe integration (singles/bundles/annual), RealizeAI design system, auth flow, CI/CD pipeline
- **WEEK 3–4 · SPRINT 2**  
**User Journey Live**  
Persona Mirror landing, Category Hub (6 categories), category detail pages, Form-Before-Download system, cart/checkout flow
- **WEEK 5–6 · SPRINT 3**  
**CATEGORY 1 GO-LIVE ★**  
TRM (scoring + zone classification + OpenAI PDF); 3P Alignment Audit (15Q + radar); Swamp Draining Reality Check; legal docs; security audit; Cat 1 production deployment
- **WEEK 7–8 · SPRINT 4**  
**Category 2 — Scoring + First Templates**  
Pilot Purgatory Audit; Antibody Audit; Master AI Initiative Charter; 4 Laws Template; Requirement Gathering Template
- **WEEK 9–10 · SPRINT 5**  
**Category 2 — Templates + Benchmarking**  
Risk Register; CFO Drift Planner; Macro P&L; 90-Day RACI; benchmarking data pipeline (anonymization + aggregation)
- **WEEK 11–12 · SPRINT 6**  
**Category 2 — Guides + Email + Book**  
5 user guides (3-Key Vault, 30 Pearls, 90-Day Roadmap, Build vs Buy, Procurement Red-Flag); SendGrid email; book integration; promo codes
- **WEEK 13–14 · SPRINT 7**  
**FULL MVP LAUNCH ★**  
Admin analytics dashboard; feedback system; full security audit (17 tools); performance tuning; mobile QA; complete handoff

## Phase 1A: Category 1 Go-Live Acceptance Checklist

- All 3 Category 1 tools functional end-to-end (form → score → OpenAI personalized PDF → S3 → download)
- Stripe checkout processes singles (\$97–\$197), bundles (\$397/\$697), and annual subscriptions (\$997/yr)
- Form-Before-Download system captures 7-field mandatory assessment before tool access
- Persona Mirror landing page renders 3 personas with non-gating selection
- Category Hub displays 6 categories (2 active, 4 “Coming Soon” placeholders)
- OpenAI PDF generation pipeline produces 4 archetype-variant personalized reports
- PDF reports include watermark, copyright, RealizeAI branding per V2.0 spec
- RLS pen-test: zero cross-user data access vulnerabilities
- Lighthouse performance score  $\geq 90$  on all pages
- Mobile responsive across iOS Safari, Android Chrome, desktop Chrome/Firefox/Edge
- Terms of Service and Privacy Policy published and accessible
- CloudFlare CDN configured; error monitoring operational

## Phase 1B: Full MVP Launch Acceptance Checklist

- All 17 MVP tools (Cat 1 + Cat 2) functional and QA-verified
- Admin analytics dashboard showing DAU, revenue, funnels, feedback
- Email integration (SendGrid): purchase confirmation, PDF delivery, nurture sequences
- Benchmarking data pipeline operational (anonymized form data aggregation with opt-in)
- Book integration (“The Machine Speaks Human” references per tool card)
- Promo code logic functional (Stripe coupons, validation, tracking)
- Feedback system active on all 17 tools (star ratings, NPS, abandonment capture)
- Full MVP security audit: OWASP Top-10 zero critical/high findings
- All 17 tools rendering correct OpenAI-personalized PDFs with brand watermarks
- PostHog analytics tracking all KPIs per Developer Brief V2.0

## Transition & Handoff Plan

Upon each phase completion, BFI delivers a structured handoff to ensure the client can independently operate, maintain, and extend the platform. Under the Build + Operate model, BFI continues managing hosting, security, and operations at \$249/mo — our incentive is aligned with your platform's ongoing success.

DELIVERABLE	DESCRIPTION	FORMAT
Source Code	Complete, documented source code repository	GitHub repo (client-owned)
Technical Documentation	Architecture docs, API reference, database schema, deployment guide	Markdown in repo + PDF
Admin Guide	How to manage users, view analytics, handle support cases	PDF + video walkthrough
Deployment Runbook	Step-by-step production deployment, rollback, and monitoring procedures	Markdown runbook
Credential Inventory	All service accounts, API keys, env vars (encrypted handoff)	1Password vault or encrypted doc
Tool Authoring Guide	How to add new tools (Category A/B/C patterns with examples)	Developer guide + component templates
Knowledge Transfer Sessions	2× 90-minute live walkthroughs of architecture and operations	Video call + recording

**Post-Launch Managed Hosting:** Under the Build + Operate model, BFI manages ongoing hosting, security patching, uptime monitoring, and incident response at **\$249/mo** (see V4 BOE for details). Client retains 100% of platform revenue. BFI has skin in the game through perpetual operations — we succeed when your platform runs reliably.

## Appendix A: BRD Compliance Matrix

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This matrix maps every BRD v2.0 section to the corresponding proposal coverage, confirming full compliance.

BRD SECTION	REQUIREMENT	PROPOSAL REFERENCE	STATUS
§1 — Executive Summary	Micro-SaaS platform, PLG, credit-based	Vol I M-01, M-02	✓ Compliant
§2 — Target Audience	Mid-market C-Suite, \$100M–\$500M companies	Vol I M-02	✓ Compliant
§3 — Technology Stack	React/Lovable, Supabase, Stripe, CDN	Vol II T-01	✓ Compliant
§4 — Monetization	5-tier pricing, credit engine	Vol II T-04, Vol III P-01	✓ Compliant
§5 — UI/UX Design	Premium dark mode, glassmorphism, responsive	Vol II T-01	✓ Compliant
§6 — 5-Stage Pipeline	Interactive horizontal pipeline, tool filtering	Vol II T-02	✓ Compliant
§7 — Tool Taxonomy	Categories A (Scorecard), B (Guide), C (Template)	Vol II T-03	✓ Compliant
§8 — Security & Privacy	RLS, GDPR, CCPA, disclaimers, pen-testing	Vol II T-05, Vol I M-05	✓ Compliant
§9 — Feedback Loop	Thumbs up/down + comment on every tool	Vol II T-03 (Sprint 6)	✓ Compliant
§10 — Book Integration	Book hub MVP, QR codes, UTM tracking	Vol II T-06 (Sprint 7)	✓ Compliant
§11 — Email Sequences	Transactional + nurture + abandoned cart	Vol II T-06 (Brevo)	✓ Compliant
§12 — Analytics	PostHog, GA4, admin dashboard, KPIs	Vol II T-06, T-07	✓ Compliant
§13 — Launch Phases	Phase 1 (MVP), Phase 2 (Scale), Phase 3 (Enterprise)	Vol I M-03, Vol IV D-01	✓ Compliant
§14 — Success Metrics	MAU, revenue, conversion, NPS targets	Vol III P-08	✓ Compliant
§15 — Risk Mitigation	8 identified risks with mitigations	Vol I M-06	✓ Compliant
§16 — Legal / IP	Copyright, trademarks, E&O insurance	Vol I M-08	✓ Noted
§17 — Glossary	Term definitions	Appendix C	✓ Compliant



#	TOOL NAME	CAT	TYPE	INPUTS	OUTPUT	PHASE
<b>CATEGORY 1 — DIAGNOSTIC FOUNDATION (3 TOOLS)</b>						
1	Tandem Realization Matrix (TRM)	1	Scoring	6 dimensions	Zone classification + OpenAI personalized PDF	1A
2	3P Alignment Audit (Two-Lock)	1	Scoring	15 questions	Triple-axis radar + archetype PDF	1A
3	Swamp Draining Reality Check	1	Guide	None	Data debt guide + downloadable framework	1A
<b>CATEGORY 2 — SCORING TOOLS (2 TOOLS)</b>						
4	Pilot Purgatory Extraction Audit	2	Scoring	Diagnostic Qs	“Kill or Scale” blocker analysis PDF	1B
5	The Antibody Audit	2	Scoring	12 questions	Resistance heatmap PDF	1B
<b>CATEGORY 2 — TEMPLATES (7 TOOLS)</b>						
6	Master AI Initiative Charter (The Gateway)	2	Template	30+ fields	Board-ready PDF/Word	1B
7	The 4 Laws Template	2	Template	Guided form	Governance framework PDF	1B
8	Requirement Gathering Template	2	Template	Structured form	Requirements capture PDF	1B
9	Master AI Risk Register	2	Template	Risk inputs	Risk framework PDF/Excel	1B
10	CFO Drift Mitigation Planner	2	Template	5–8 inputs	OpEx tracking model	1B
11	Macro YoY P&L Model	2	Template	Financial inputs	Multi-tab financial model	1B
12	90-Day Sprint RACI Matrix	2	Template	Role inputs	RACI matrix PDF/Excel	1B
<b>CATEGORY 2 — USER GUIDES (5 TOOLS)</b>						
13	Scoping — The 3-Key Vault	2	Guide	None	Interactive methodology guide	1B
14	The 30 Pearls for a Pilot Project	2	Guide	None	Searchable catalog	1B
15	90-Day Implementation Roadmap	2	Guide	None	Interactive sprint-by-sprint guide	1B
16	Build vs. Buy Checklist	2	Guide	None	Decision framework with scoring	1B

#	TOOL NAME	CAT	TYPE	INPUTS	OUTPUT	PHASE
17	Procurement Red-Flag Checklist	2	Guide	None	Vendor evaluation grid	1B

A-03

## Appendix C: Glossary of Terms

TERM	DEFINITION
BRD	Business Requirements Document — superseded by Developer Brief V2.0 (18 Mar 2026)
BOE	Basis of Estimate — bottom-up cost derivation from hours, rates, and work elements
Cat 1 / Cat 2	Category 1 (Diagnostic Foundation, 3 tools) and Category 2 (Strategic + Operational, 14 tools) per V2.0 §7
Form-Before-Download	Access model: users complete mandatory 7-field assessment before receiving tool output (replaces credit engine)
PLG	Product-Led Growth — acquisition model where the product itself drives conversion
RLS	Row-Level Security — Supabase/PostgreSQL policy enforcing per-user data isolation
SDVOSB	Service-Disabled Veteran-Owned Small Business — SBA certification held by BFI
Sprint	2-week development cycle ending with a deployable increment and live demo
UAT	User Acceptance Testing — stakeholder validation before deliverable sign-off
MVP	Minimum Viable Product — Phase 1A + 1B deliverable with 17 tools (Cat 1 + Cat 2)
ARPU	Average Revenue Per User — total revenue divided by number of paying users
NPS	Net Promoter Score — customer satisfaction metric (-100 to +100)
UTM	Urchin Tracking Module — URL parameters for campaign attribution (e.g., utm_source=book)
DPA	Data Processing Agreement — required for EU customer GDPR compliance
E&O Insurance	Errors & Omissions professional liability insurance

## Appendix D: About BlueFalconInk LLC

### COMPANY OVERVIEW

**BlueFalconInk LLC** is a Service-Disabled Veteran-Owned Small Business (SDVOSB) headquartered in Bossier City, Louisiana. Founded and operated by **John Eric Lewis** — veteran, solution architect, and full-stack engineer — the company designs, ships, and operates production-grade AI systems. BFI's unique "Human Led, Agent Driven" model combines one senior architect with a 13-agent AI fleet to deliver enterprise-grade output at competitive pricing with perpetual managed hosting.

### PRODUCTION PLATFORM

BFI operates a 26-service production AI platform on Google Cloud with 26 Cloud Run services, 13 ADK-powered AI agents, two completed OWASP security sprints (23 findings remediated), and ID-token authenticated cross-agent communication — all at under \$58/month infrastructure cost.

#### SDVOSB

SBA Certified

✓ Active

#### OWASP

Top-10 Audited

✓ 2 Sprints

#### GCP

Cloud Run Fleet

✓ Production

#### AI/ADK

13 Agents

✓ Live

#### Louisiana

LLC Registered

✓ Active

### CONTACT

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## BlueFalconInk

Service-Disabled Veteran-Owned Small Business

Volume IV: Delivery & Appendices · Build + Operate Proposal for AI Value Realization Accelerator (V4 Hosting-First)

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