PRISM

Pre-meeting Research Intelligence System Manager

Transforming Sales Intelligence Through AI-Powered Meeting Preparation

Delivering the right insights at the right time

PRODUCT REQUIREMENTS DOCUMENT (PRD)

1. PROJECT SUMMARY

PRISM (Pre-meeting Research Intelligence System Manager) is an AI-powered B2B sales intelligence platform that automatically generates Meeting Prep Packs for enterprise sales representatives before every client meeting. PRISM eliminates the 2–3 hour manual research cycle that costs enterprise teams hundreds of productive hours per week.

PRISM eliminates this problem. In under 5 minutes, PRISM synthesises data from four sources — CRM history, financial APIs, news aggregators, and social listening signals — and delivers a structured, actionable Meeting Prep Pack directly to the sales rep before each scheduled interaction.

> **Core Value Proposition**
> Intelligence. Delivered. Before the Conversation Begins. — PRISM is the AI intelligence layer that automatically aggregates CRM history, news signals, financial data, and stakeholder insights into a meeting-ready brief. From 2–3 hours of manual research to under 15 minutes. Automatically.

Product Summary Table

Dimension	Detail
Target Market	Enterprise and mid-market B2B sales organisations in BFSI, SaaS, Pharma; Bengaluru, Mumbai, NCR
Primary Users	Account Executives (AEs), SDRs, Sales Managers, RevOps teams
Primary Buyer	CRO, VP Sales, Head of Sales Enablement
CRM Dependency	Salesforce and HubSpot (OAuth integration); Zoho and MS Dynamics — roadmap
AI Engine	LLM-based synthesis (OpenAI/Gemini APIs) across financial, news, CRM, and social data pipelines
Pricing	₹4,000 / ₹9,500 / ₹17,000 per user/month (Essential / Pro / Enterprise)
Year 1 Target	50,000 users · 80–100 enterprise accounts · ₹16Cr ARR

2. GOAL AND SUCCESS CRITERIA

2.1 Outcomes

- Eliminate manual pre-meeting research — reduce average prep time from 2–3 hours to under 15 minutes per meeting
- Improve sales win rates through better meeting preparation and contextualised intelligence
- Improve CRM data hygiene through automated post-meeting logging
- Drive enterprise-wide adoption with a PLG-led, CSM-assisted growth model

2.2 Success Metrics — Current State (Baseline)

Metric	Current Baseline
Pre-meeting research time per rep	2–3 hours per meeting
CRM note completion rate (post-meeting)	<40% of meetings have structured notes
Average sales win rate (enterprise AEs)	22–25% across target segments
Rep onboarding time (new AE ramp)	90–120 days to full quota attainment
Manual research tool usage	LinkedIn, Google News, CRM manual search — 3+ separate tools per session

2.2 Success Metrics — Target State (Month 12)

Metric	Target	Measurement Method
Pre-meeting research time	<15 min per meeting (80% reduction)	In-app time tracking + rep survey
Meeting Prep Packs generated	10,000 / week by Month 12	PRISM product analytics (North Star)
CRM field completion rate	>80% meetings auto-logged via PRISM Sync	Salesforce / HubSpot field audit
Sales win rate improvement	+15% relative improvement	CRM deal outcomes cohort analysis
Trial → Paid conversion	25% of trial sign-ups convert to paid	CRM pipeline cohort
Net Revenue Retention (NRR)	≥115% at Month 12	Revenue cohort model
NPS (post 90-day users)	≥50	Delighted / Typeform survey
CAC payback period	≤6 months	Finance + CRM attribution

3. PROBLEM

3.1 Problem Description

Enterprise B2B sales representatives face a compounding research problem. Before each significant client meeting, reps are expected to understand the prospect's business context, recent news, financial health, stakeholder changes, and competitive landscape — all through manual search across disconnected platforms.

Three failure modes compound this problem:

- Time cost: A team of 10 AEs each attending 5 meetings/week wastes 500–750 person-hours per week on manual research — equivalent to 3 full-time roles.
- Quality inconsistency: Manual research quality varies by rep seniority. Junior reps miss critical signals; senior reps repeat the same time-intensive process.
- CRM degradation: Post-meeting, only ~40% of meetings have structured notes logged. Without automation, CRM data degrades, harming forecasting, onboarding, and account continuity.

3.2 Problem Validation

Evidence Source	Finding
User Interviews (AEs)	"I spend Sunday nights researching Monday morning calls. If I could get 30 minutes back before each meeting, I'd use it for outreach." — Enterprise AE, FinTech company
CRM Audit (Pilot Accounts)	Average post-meeting CRM note length: 12 words. Structured fields (deal stage, next steps) empty in >60% of reviewed records.
Win/Loss Analysis	35% of lost deals cited 'rep appeared unprepared' as a secondary reason in exit interviews
Competitor Gap	No existing tool combines CRM context + financial signals + news + stakeholder data into a single pre-meeting brief.

3.3 Root Cause Analysis

- Data fragmentation: Relevant signals exist in 4–6 different systems with no aggregation layer
- No automation: Research workflow is 100% manual — no triggers, no synthesis, no templating
- No integration point: Insights are generated outside the CRM, creating a context-switch for the rep
- No institutional memory: Each prep session starts from scratch; prior meeting notes are rarely reviewed

4. SOLUTION

4.1 Three-Stage AI Pipeline

PRISM addresses the fragmentation problem through a three-stage AI pipeline — INGEST → SYNTHESISE → DELIVER — triggered by a single user action (selecting an upcoming meeting or company name).

Stage	What PRISM Does	Data Sources
INGEST	Pulls all relevant signals for the target account in parallel	CRM (Salesforce/HubSpot), Bloomberg/Yahoo Finance, News APIs, LinkedIn Sales Navigator
SYNTHESISE	PRISM AI fuses signals into a structured Meeting Prep Pack using LLM	All ingested signals processed by GPT-4o / Gemini 1.5 with PRISM prompt engineering
DELIVER	Pack delivered as PDF, in-app 3-panel view, and CRM-attached note	PRISM dashboard, email digest, CRM auto-attach, Slack alert (PRISM Pulse™)

4.2 Total Addressable Market

Market	Definition	Size
TAM	All B2B sales professionals globally who could benefit from pre-meeting intelligence	18 million
SAM	CRM-active B2B sales professionals in India + Southeast Asia target verticals (BFSI, SaaS, Pharma)	5.5 million
SOM (Year 1)	Enterprise/mid-market accounts in Bengaluru, Mumbai, NCR with Salesforce or HubSpot deployment	50,000 users · 80–100 accounts
SOM (Year 3)	Expanded geography (Pune, Hyderabad, Chennai) + international (Singapore, Dubai)	500,000 users · 800+ accounts

4.3 Two-Cycle Strategic Framework

Cycle	Objective	Activities	Key Outputs
Cycle 1Product Discovery & Validation	Build the right product	Market research · Competitor analysis · Customer interviews · Feasibility analysis · MVP testing · User feedback loops	Validated problem statement · User personas · MVP scope · PMF signals · Feature prioritisation
Cycle 2Go-To-Market & Scale	Get the product to market and drive adoption	GTM strategy · Channel strategy · B2B sales planning · Pricing & packaging · Brand positioning · Customer success playbooks	Customer acquisition · Revenue generation · User retention · Expansion strategy · Market penetration

4.4 Impact: PRISM vs. Status Quo

Dimension	Without PRISM	With PRISM	Delta
Research time / meeting	2–3 hours	<15 minutes	−80%
CRM logging rate	~40%	>80%	+40pp
Win rate	22–25%	~28%+	+15% relative
Rep ramp time	90–120 days	~55–70 days	~40% faster
Tools used per session	3–5 (manual)	1 (PRISM)	Unified

5. STRATEGIC FRAMEWORKS

5.1 SWOT Analysis

Strengths	Weaknesses
Strong AI-driven differentiation · Reduces manual research time 80%+ · Multi-source intelligence aggregation · CRM-native workflow integration · Self-improving model via rep feedback	Heavy dependency on external APIs and CRM integrations · Requires high-quality CRM data to function effectively · High initial data engineering complexity · B2B enterprise sales cycles are long
Opportunities	Threats
Growing AI adoption in enterprise sales · Expansion into RevOps and sales enablement · CRM marketplace distribution at scale · International expansion to SEA and Middle East	Large competitors (Salesforce, LinkedIn) can replicate features · Data privacy and compliance complexity · API cost increases reducing margin · Low AI trust among conservative sales teams

5.2 Ansoff Matrix

Strategy	PRISM Application
Market Penetration	Sell PRISM to existing CRM-based B2B sales teams through LinkedIn campaigns, enterprise pilots, and CRM marketplace listings
Product Development	Introduce AI meeting summaries, predictive deal intelligence, competitive battle cards (PRISM Lens™)
Market Development	Expand from enterprise SaaS/BFSI companies into Pharma, Consulting, and international markets (Singapore, Dubai)
Diversification	Expand into broader AI-powered RevOps automation and sales coaching platforms (PRISM Coach™) — Year 2+

5.3 PESTEL Analysis

Factor	PRISM Impact	Implication
Political	Data governance and AI regulations influence enterprise adoption	Monitor AI regulation bills in India and EU; engage legal counsel early
Economic	Economic slowdowns may reduce SaaS spending; productivity tools remain attractive for ROI optimisation	Build strong ROI calculator; position PRISM as cost-saving, not cost-adding
Social	Increasing expectation for automation and faster workflows among sales teams	Brand messaging aligned with 'work smarter' narrative — strong tailwind
Technological	Rapid advancement in LLMs and AI APIs enables better intelligence generation	Use latest model APIs; build model-agnostic pipeline to switch providers as costs fall
Environmental	Cloud infrastructure usage increases energy consumption	Optimise compute; highlight energy-efficient batched processing in enterprise pitches

Legal	GDPR (EU), DPDP Act (India), and enterprise data privacy regulations are critical	Full compliance architecture before launch; consent management built into CRM auth flow

5.4 Porter's Five Forces

Force	Level	PRISM Analysis
Competitive Rivalry	High	Competitors include LinkedIn Sales Navigator, ZoomInfo, Gong, Clari, and Salesforce AI tools — but none combine all four data sources into a single pre-meeting brief
Threat of New Entrants	Medium	AI tools are easier to build now, but enterprise trust, CRM certification, and data integrations create meaningful barriers to parity
Bargaining Power of Buyers	High	Enterprises have multiple sales intelligence alternatives; PRISM must demonstrate clear ROI and switching cost through deep CRM integration
Bargaining Power of Suppliers	Medium–High	Dependency on OpenAI/Gemini APIs and CRM ecosystems creates cost and continuity risk; mitigated by model-agnostic pipeline design
Threat of Substitutes	Medium	Manual research, CRM dashboards, and existing sales workflows are functional substitutes; PRISM wins by making automation the path of least resistance

> **Key Porter's Insight**
> PRISM's strongest defense is its ability to combine multiple fragmented intelligence streams — CRM, news, financial, social — into a single workflow. This multi-source synthesis is the hardest capability to replicate, making it PRISM's primary competitive moat.

5.5 GDPR / Data Governance Framework

Principle	PRISM Implementation
Data Privacy	Customer and prospect data securely stored and processed; users informed of all data usage at onboarding
Consent Management	Enterprise users approve CRM integrations and data access via OAuth; no unauthorised third-party data sharing
Transparency	Every AI-generated insight includes source attribution (CRM / news / financial / social); reps can verify all outputs
Security	Encrypted data pipelines; secure passkey authentication; role-based access controls (RBAC); SOC 2 Type II certification roadmap
Compliance	GDPR compliance for EU-based users; DPDP Act compliance for Indian users; enterprise audit logging for all data access events

6. FEATURE PRIORITISATION — RICE & MOSCOW

RICE = (Reach × Impact × Confidence) ÷ Effort. Reach: 1–10 (users impacted). Impact: 1–5 (strength of value). Confidence: 50–100% (certainty of assumptions). Effort: 1–5 (build complexity). Higher scores indicate higher priority. The primary filter: does this feature cut into the 30–60 minutes reps spend on pre-meeting prep?

6.1 RICE Scoring

#	Feature	Reach	Impact	Conf.	Effort	RICE	Priority
1	AI Meeting Prep Pack Generator	10	5	95%	3	15.8	Must Build
2	CRM Integration (Salesforce + HubSpot)	9	5	90%	3	13.5	Must Build
3	AI Talking Point Generator	9	4.5	90%	2.5	14.6	Must Build
4	Company + News Intelligence Aggregation	9	4.5	85%	3	11.5	Must Build
5	Meeting Dashboard	8	4	90%	2	14.4	Must Build
6	Real-Time Alerts (PRISM Pulse™)	8	4	85%	2.5	10.9	Must Build
7	Auto CRM Logging (PRISM Sync™)	8	4.5	80%	3.5	8.2	Must Build
8	AI Meeting Summary	8	4	85%	3	9.1	Must Build
9	Stakeholder Intelligence	7	4	80%	3	7.5	Must Build
10	Human-in-the-Loop Feedback	7	3.5	85%	2.5	8.3	Must Build
11	Secure Login / Passkey Auth	7	3	90%	2	9.5	Must Build
12	Notification System	8	3.5	85%	2.5	9.5	Must Build
13	Morning Briefs	6	3.5	75%	3	5.3	Should Build
14	Calendar Integration	7	3.5	75%	3	6.1	Should Build
15	Usage Analytics Dashboard	6	3.5	75%	3	5.3	Should Build
16	Team Collaboration	5	3	70%	2.5	4.2	Should Build
17	Competitive Intelligence (PRISM Lens™)	5	3.5	70%	4	3.1	Could Build
18	Slack / Teams Alerts	5	3	70%	3	3.5	Could Build
19	AI Email Drafting	5	3	70%	3	3.5	Could Build

20	Predictive Deal Risk Scoring	4	4	60%	5	1.9	Later
21	Autonomous AI Agent Workflows	4	4.5	55%	5	2.0	Later
22	Advanced Personalisation Engine	4	3.5	60%	4.5	1.9	Later

6.2 MoSCoW Prioritisation

Category	Feature	Purpose
Must Have	AI Meeting Prep Pack Generator	Core value proposition of PRISM
Must Have	CRM Integration (Salesforce + HubSpot)	Provides meeting and account context
Must Have	Company + News Intelligence Aggregation	Delivers real-time company updates
Must Have	Stakeholder Intelligence	Enables personalised conversations
Must Have	AI Talking Point Generator	Converts raw data into actionable insights
Must Have	Meeting Dashboard	Central workspace for all users
Must Have	Real-Time Alerts (PRISM Pulse™)	Proactive deal trigger intelligence
Must Have	AI Meeting Summary	Reduces post-meeting admin burden
Must Have	Auto CRM Logging (PRISM Sync™)	Automates CRM hygiene
Must Have	Secure Authentication / Passkey	Enterprise-grade security
Must Have	Human-in-the-Loop Feedback	Improves AI accuracy and rep trust
Must Have	Notification System	Keeps reps informed and engaged
Should Have	Morning Briefs	Creates daily usage habit
Should Have	Calendar Integration	Improves workflow continuity
Should Have	Usage Analytics Dashboard	Shows measurable ROI to buyers
Should Have	Role-Based Access Control (RBAC)	Supports enterprise team management
Could Have	Competitive Intelligence (PRISM Lens™)	Enterprise sales enablement
Could Have	AI Email Drafting	Extends workflow automation
Could Have	Slack / Microsoft Teams Alerts	Additional engagement channels
Won't Have (MVP)	Fully Autonomous AI Agent	High reliability / execution complexity
Won't Have (MVP)	Predictive Deal Risk Scoring	Requires historical enterprise datasets
Won't Have (MVP)	Revenue Forecasting	Depends on mature usage data
Won't Have (MVP)	Custom Fine-Tuned AI Models	External LLM APIs sufficient for MVP

7. USER STORIES

ID	Persona	User Story
#US1	Sales Rep (AE)	As a sales rep, I want to receive a Meeting Prep Pack for every upcoming meeting so that I spend less than 15 minutes preparing instead of 2–3 hours.
#US2	Sales Rep (AE)	As a sales rep, I want to see recent financial news and funding activity for my prospect so that I can tailor my pitch to their current business context.
#US3	Sales Rep (AE)	As a sales rep, I want PRISM to auto-log my meeting outcomes to the CRM so that I don't lose selling time on admin after calls.
#US4	Sales Rep (AE)	As a sales rep, I want to receive real-time deal alerts (PRISM Pulse™) when a key trigger occurs at a target account so that I can act before competitors do.
#US5	SDR	As an SDR, I want stakeholder intelligence (job history, recent posts, shared interests) so that I can personalise my outreach and improve reply rates.
#US6	CRO / VP Sales	As a CRO, I want my team to be consistently prepared before every client meeting so that our win rates improve and we reduce deals lost to 'rep appeared unprepared'.
#US7	CRO / VP Sales	As a VP Sales, I want visibility into which reps are using PRISM and correlating it with deal outcomes so that I can coach adoption and track ROI.
#US8	Sales Manager	As a sales manager, I want PRISM to flag at-risk accounts based on engagement patterns so that I can proactively coach my team on the right deals.
#US9	RevOps	As a RevOps lead, I want PRISM to integrate with Salesforce and auto-populate deal fields so that our CRM data hygiene improves without adding rep overhead.
#US10	RevOps	As a RevOps lead, I want PRISM to connect via OAuth without a complex IT deployment so that I can get the team live within days, not months.
#US11	IT Admin	As an IT administrator, I want PRISM to offer role-based access controls and audit logging so that we maintain security compliance and data governance standards.

8. FUNCTIONAL REQUIREMENTS

FR1 AI Meeting Prep Pack Generator

- Rep selects an upcoming meeting or enters a company name to trigger Prep Pack generation
- PRISM runs 4 parallel data pipelines: CRM history, financial APIs (Bloomberg/Yahoo Finance), news aggregators, LinkedIn signals
- PRISM AI synthesises all signals into a structured pack: Company Brief | Stakeholder Intel | Recent Triggers | AI Talking Points | Risk Flags
- Pack delivered as: in-app 3-panel dashboard view + PDF download + CRM auto-attached note + email digest
- Generation time target: <5 minutes P95 for a standard 4-source pack

FR2 CRM Integration (Salesforce + HubSpot)

- One-click OAuth 2.0 authentication with Salesforce and HubSpot — no IT deployment required
- On connect: PRISM imports contact list, deal history, account data, meeting notes, and email threads
- Post-meeting: PRISM Sync™ auto-pushes structured meeting summary + next steps to the CRM deal record

- CRM field completion rate target: >80% of meetings with auto-generated structured notes
- Support for Zoho CRM and Microsoft Dynamics on the 12-month roadmap
- Bidirectional sync — CRM updates reflected in PRISM within 15 minutes

FR3 Stakeholder Intelligence Module

- Pulls stakeholder data from LinkedIn Sales Navigator API: job title, tenure, recent posts, shared connections, career history
- Identifies key decision-makers and influencers across the target account automatically
- Flags stakeholder changes (new hires, promotions, departures) as deal trigger signals
- All stakeholder insights labelled with source and confidence level for rep transparency
- Privacy compliant: only publicly available professional data used; no personal data accessed without consent

FR4 Real-Time Deal Alerts — PRISM Pulse™

- Monitors target accounts continuously for deal triggers: funding announcements, M&A events, leadership changes, earnings releases, regulatory filings, product launches
- Alerts delivered via: in-app notification, email digest, Slack (Could Have), push notification
- Reps can configure alert sensitivity per account (high / medium / low)
- Each alert includes: trigger summary, source link, AI-suggested next action
- PRISM Pulse™ activated for all Pro and Enterprise tier accounts

FR5 Auto CRM Logging — PRISM Sync™

- Post-meeting, PRISM generates an AI-drafted meeting summary from the Prep Pack + rep outcome input
- Summary auto-pushed to the CRM deal record: meeting type, outcome, next steps, follow-up date
- Rep confirms or edits the AI summary before final CRM push (human-in-the-loop gate)
- Auto-update deal stage based on rep-indicated meeting outcome (e.g. 'discovery → demo scheduled')
- All CRM sync events logged with timestamp and user attribution for audit trail

FR6 Meeting Dashboard

- Central workspace showing all upcoming meetings with PRISM Prep Pack status (generated / pending / triggered)
- Quick-access Prep Pack view per meeting with 3-panel layout: Company Brief | Stakeholder Intel | Talking Points
- Meeting history view with past packs, outcomes, and follow-up tracking
- Morning Digest: daily email sent at 7 AM showing all meetings for the day with prep pack links
- Manager view: team-level dashboard showing rep prep activity and usage metrics

FR7 Secure Authentication & Access Control

- Passkey + SSO (SAML 2.0) authentication for enterprise accounts
- Role-based access control (RBAC): Admin, Manager, AE, SDR roles with distinct permission levels
- Admin panel: user management, license allocation, usage reporting, integration management
- All data access events logged for enterprise audit compliance (DPDP Act / GDPR)
- Session timeout and auto-logout after inactivity for security compliance

FR8 Human-in-the-Loop Feedback System

- Rep can rate each Prep Pack (1–5 stars) and flag inaccurate or irrelevant insights
- Flagged insights feed into PRISM's model improvement pipeline with source review
- Accuracy confidence scores displayed per insight so reps can calibrate trust
- Monthly accuracy report shared with CSM and account admin showing improvement over time

9. NON-FUNCTIONAL REQUIREMENTS

Category	Requirement	Target SLA
Performance	Prep Pack generation end-to-end latency	<5 minutes P95
Performance	CRM sync (post-meeting push to Salesforce/HubSpot)	<60 seconds
Performance	Dashboard page load time	<500ms P95
Availability	Platform uptime SLA	99.9% monthly (Enterprise); 99.5% (Pro)
Security	API key and credential management	Secrets vault (HashiCorp Vault or equivalent)
Compliance	GDPR and DPDP Act compliance	Full compliance before public GA launch
Compliance	SOC 2 Type II audit	Certification target: Month 12
Data Quality	CRM data freshness (last sync to dashboard)	≤15 minutes lag
Accuracy	AI insight accuracy (rep-rated 4+ stars)	≥85% of packs rated 4+/5 by Month 6
Mobile	Responsive web experience for field reps	Fully functional on mobile browsers (iOS Safari, Android Chrome)

10. INSTRUMENTATION REQUIREMENTS

10.1 North Star Metric

> **North Star: Weekly Meeting Prep Packs Generated**
> This single metric captures the platform's core value delivery — every pack generated represents a rep being more prepared for a client meeting. Target: 10,000 packs / week by Month 12.

10.2 Funnel Metrics

Funnel Stage	Metric	Target
Acquisition	MQLs generated per month	200 MQLs/month by Month 6
Activation	Time to first Prep Pack generated	<48 hours from CRM connect

Activation	Trial accounts generating ≥5 packs/week	≥60% of trials within first 14 days
Conversion	Trial → Paid conversion rate	≥25%
Retention	DAU/MAU ratio	≥40% (healthy engagement signal)
Retention	Gross Revenue Retention (GRR)	≥90% at Month 12
Expansion	Net Revenue Retention (NRR)	≥115% at Month 12
Advocacy	NPS (post 90-day users)	≥50

10.3 Product Analytics Events

- prep_pack_generated — {account_id, rep_id, trigger_source, generation_time_ms}
- prep_pack_viewed — {pack_id, view_duration_sec, sections_expanded}
- prep_pack_rated — {pack_id, stars, flagged_insights[]}
- crm_sync_completed — {meeting_id, crm_platform, fields_updated[], sync_latency_ms}
- pulse_alert_triggered — {account_id, trigger_type, rep_action_taken}
- trial_activated — {account_id, crm_platform, seats_connected}
- upgrade_to_paid — {account_id, from_tier, to_tier, trigger}

10.4 Cohort Analysis Requirements

- Week 1 cohorts: % of trial accounts generating first Prep Pack within 48 hours
- Month 1 cohorts: trial → paid conversion by CRM platform and company size
- Month 3 cohorts: rep-level DAU/MAU split and correlation with deal win rates
- Month 6 cohorts: GRR by tier (Essential / Pro / Enterprise) and vertical (BFSI / SaaS / Pharma)
- Month 12 cohorts: NRR by account size; expansion seat growth; feature adoption by tier

11. RELEASE STRATEGY AND PHASES

Phase	Timeline	Scope	Success Gate
Phase 1Closed Beta	Months –3 to 0	5 design partner accounts (2 BFSI, 2 SaaS, 1 Pharma). FR1 (Prep Pack), FR2 (CRM Integration), FR6 (Dashboard), FR7 (Auth)	≥80% of beta reps generate ≥1 pack/week. NPS ≥40. No P1 bugs at GA.
Phase 2General Availability (GA)	Month 0–2	Full public launch. All Must Have features (FR1–FR8). Product Hunt launch. AppExchange + HubSpot Marketplace listing.	200 trial accounts in Month 1. ≥25% trial→paid by Month 2. ARR ₹2Cr.
Phase 3Growth & Upsell	Months 3–6	Launch PRISM Pulse™ upsell to existing accounts. Introduce Should Have features: Morning Briefs, Calendar Integration, Usage Analytics.	35% of accounts on Pro+ tier. ARR ₹5Cr. NPS ≥50.
Phase 4Scale & Expand	Months 7–12	Channel partner programme (SI + Resellers). Zoho CRM integration. PRISM Lens™ (competitive intel). Could Have features.	80 accounts. ARR ₹16Cr. GRR ≥90%. NRR ≥115%.

Phase 5Product Maturity	Year 2+	Autonomous AI Coach (PRISM Coach™). Predictive deal risk scoring. Sovereign cloud option. Multi-language support.	500K users. ARR ₹83Cr (Year 3 target).

UAT & Rollout Checklist (Phase 2 GA)

- CRM OAuth integration tested end-to-end with Salesforce sandbox and HubSpot test portal
- Prep Pack generation validated for ≥10 industry verticals with accuracy review by CSM team
- PRISM Sync auto-logging tested with CRM field-level validation (no overwrite of manually entered data)
- RBAC roles tested: Admin, Manager, AE, SDR — confirm permission boundaries
- GDPR / DPDP data consent flow tested; audit log entries verified for all data access events
- Load test: 1,000 concurrent Prep Pack generation requests; latency <5 min P95 confirmed
- Sales team trained on demo script and trial onboarding flow before GA
- CSM team trained on playbooks (onboarding, at-risk, expansion, renewal)
- AppExchange certification submitted and approved before GA date

Input / Check Metrics by Phase

Phase	Input Metric	Check Metric
Phase 1 (Beta)	# packs generated per beta account/week	% reps rating pack ≥4 stars; P1 bug count
Phase 2 (GA)	# trial sign-ups; % activating CRM within 48 hrs	Trial→paid CR; CAC vs. plan
Phase 3 (Growth)	% accounts upgrading to Pro+; Pulse™ alert CTR	NRR vs. 115% target; churn rate by tier
Phase 4 (Scale)	Channel partner-sourced pipeline; new geo sign-ups	GRR ≥90%; ARR ₹16Cr milestone
Phase 5 (Mature)	Coach™ activation rate; international trial accounts	ARR ₹83Cr (Year 3); Series A data room readiness