



## **Executive Summary**

Our team is developing Context, a mobile application designed to help people manage the relationships that matter most to them. As consumers juggle an increasing number of social media platforms and struggle to keep track of their growing networks, the demand for an all-in-one solution is greater than ever. Context offers a freemium model with paid tiers that unlock valuable features, making it especially appealing to professionals seeking better relationship management tools. With an addressable market of 31.5 million users in the U.S., Context stands out as a more effective alternative to existing alternatives.

To develop our MVP and bring Context to market, we are seeking \$1 million in exchange for 10% equity in the company. This investment will fund product development, marketing, and essential operational costs to drive growth. With this investment, we project Context will generate \$28.35 million in revenue and if we can capture 10% of the serviceable addressable market within 3 years. With a strong founding team and well-defined strategy, we are confident Context will transform the way people foster connections and nurture their most important relationships while delivering significant returns for our investors.

## **Market Opportunity**

**Job To Be Done (JTBD):** People need help maintaining their relationships so they don't lose touch and can build new, strong connections.

### **Related JTBD:**

- Improve personal and professional networking for future opportunities
- Reminder important details about people, like birthdays, family members, and interests. So people can catch up more easily.
- Stay in contact naturally and easily, without feeling pushed.
- Follow up on the last conversation or meet.
- Easily grade a topic and continue the conversation without feeling awkward.

### **Market research**

This is an extremely large category with many major players in the market such as LinkedIn, Facebook, Instagram, Snapchat, and TikTok. There are over 5.22 billion social media users worldwide.

**Total Addressable Market (TAM):** 217 million users.

The United States has a population of 350 million people, and approximately 96% of the US population (310 million) owns a smartphone (Laricchia, 2024). Assuming that 70% of smartphone users use a messaging service, the TAM for Context is 217 million users.



**Serviceable Addressable Market (SAM):** 31.5 million users.

The app is aimed at young professionals who are constantly meeting new people, as well as younger individuals looking to document their lives with friends and maintain lifelong friendships. Currently, 97% of people aged 18–29 own a smartphone, and assuming that this age group constitutes 15% of the population, the SAM is around 31.5 million users.

**Serviceable Obtainable Market (SOM):** 3.15 million users.

Assuming we can capture around 10% of the SAM, the SOM would be 3.15 million users. We also anticipate 30% of users paying for premium features (\$10), and 20% of users paying for business features (\$30).

**Competitor Analysis**

This is a competitive market while innovative new stars can always take a piece of the market.

Competitor	Strength	Weakness
<b>Google Calendar</b>	Easy-to-use, widely adopted, great scheduling features	Lacks depth in relationship management, only useful for reminders
<b>Cloze</b>	AI-powered personal CRM, integrates with emails and social platforms	More business/professional focused, complex UI
<b>Snapchat</b>	Engaging, personal interactions, frequent touchpoints	No structured relationship tracking, lacks automation
<b>Instagram</b>	Strong engagement via posts/stories, casual networking	No organization of contacts, lacks automation and relationship tracking
<b>Paper Planners</b>	Full customization, no reliance on software	Completely manual, no automation or tracking



## **Solution & Business Model**

### **Minimum Viable Product (MVP)**

Our proposed solution is divided into two sub-categories: professional relationships and personal relationships.

#### **Professional Relationships**

This solution is a chat app that combines the functionalities of a contacts app with a mini-portfolio. Professionals can update their mini-portfolio to showcase their work experience, roles, and a short bio about themselves, and share this with any professional they choose. It is targeted toward salespeople who are constantly on the move and meeting hundreds of people every week. The app will record interactions and text conversations between individuals. If two people are attending a conference, the app will notify them that their contact is present and provide a brief description of their previous interactions (as input by the user), text conversations, a quick overview of the other person's bio, and any updates in their professional life since the last interaction.

#### **Personal Relationships**

The personal relationships side of the app will have subdivisions labeled family, close friends, and friends. The app will record the context of our relationships and our shared history (initially input manually) and will automatically serve as a digital scrapbook of our experiences and interactions after setup. It will periodically remind me to reach out to different people, providing a brief summary of our previous conversation. The app will also track important dates such as birthdays and anniversaries, as well as various shared experiences (similar to Snapchat memories). Additionally, I want the app to include a location-sharing feature similar to Find My on Apple devices. The app will also remind me to reply to messages if I have forgotten to respond (similar to what Spark did for emails). Furthermore, the product will have the ability to build relationships by suggesting new experiences to try together based on mutual interests and available dates and times (similar to Teams, but done automatically with the help of AI), with the ability to deploy an AI agent to book the experience for the participants.



	Low Urgency	High Urgency
High Impact	<ul style="list-style-type: none"> <li>Collection and display of shared experiences (akin to Snapchat memories)</li> <li>Input of shared history and relationship context that evolves into a digital scrapbook</li> <li>AI-driven suggestions for new experiences to try around mutual interests and available dates/times</li> <li>Deployment of an AI agent to automatically book experiences for participants</li> </ul>	<ul style="list-style-type: none"> <li>End-to-end encrypted messaging- Recording and storing interactions and text conversations</li> <li>Categorization of contacts into family, close friends, friends</li> <li>Periodic reminders to reach out to contacts (with a summary of the previous conversation)</li> <li>Reminders to respond to messages (similar to Spark emails)</li> </ul>
Low Impact	<ul style="list-style-type: none"> <li>Ability to share mini-portfolios with selected professional contacts</li> <li>Automated notifications when a contact is present at an event (e.g., a conference)</li> <li>Tracking of important dates such as birthdays and anniversaries</li> <li>Location-sharing functionality (similar to Apple’s Find My)</li> </ul>	<ul style="list-style-type: none"> <li>Mini-portfolio creation and updating (work experience, roles, short bio)</li> <li>Ability to share mini-portfolios with selected professional contacts</li> <li>Display of any contact including previous interactions, conversation snippets, updated bio, roles</li> <li>Categorization of contacts into family, close friends, and friends</li> </ul>

**Desirability**

Although the growth in the number of smartphones has stagnated compared to the meteoric rise in the early 2010s, there is still a large and growing market for SaaS. In the near future, AI agents are expected to replace most SaaS solutions, emerging as an even larger market. With the implementation of AI to track personal context and suggest experiences based on shared interests, the app should be competitive. Furthermore, around 56.5% of people aged 18–29 reported feeling lonely in 2022 (*Loneliness in the U.S. - statistics & facts | statista 2024*), which supports the desire for a solution that strengthens existing connections rather than merely increasing the number of connections.

**Feasibility**

Based on current advancements in AI, existing technology, and most importantly the technical capabilities of the team, we believe that the product we have set out to create is feasible.



## **Viability**

The product is viable, as evidenced by the existence of messaging services like iMessage, WhatsApp, Signal, and Telegram. The most significant challenge will be capturing market share from these established players. Other challenges may be regarding the pricing model being followed that does not rely on advertisements to generate revenue.

## **Minimum Viable Brand (MVB)**

At Context, we empower people to stay connected, build meaningful relationships, and seamlessly maintain both professional and personal networks through AI-driven engagement.

We believe strong relationships require consistent and meaningful interactions—not passive connections. Our technology fosters proactive engagement while upholding strict privacy standards, ensuring users have full control over their relationship data.

## **Target Audience**

We serve both businesses and consumers:

- For businesses, our product enhances professional networking, particularly for sales professionals who rely on strong relationships.
- For consumers, we help individuals maintain and strengthen personal connections, especially during life transitions.

Our primary audience is young adults, as they are more receptive to AI-integrated relationship management. While some older demographics may be hesitant to adopt such technology, younger users are more adaptable and actively seek ways to nurture their networks.

## **Our Brand Differentiation**

Unlike traditional social media, Context focuses on deepening existing relationships rather than expanding shallow connections. Our AI-driven platform understands personal context and proactively suggests shared experiences based on mutual interests and availability—similar to Teams, but fully automated.

## **Our Offering**

We provide effortless relationship management through AI-powered tracking & reminders; seamless integration with calendars, messaging apps, and CRMs; smart engagement suggestions to help users nurture relationships instead of losing touch

## **Brand Identity**

Please check the appendix for the LOGO. Our logo is an “X” within a circle, which symbolizes connected nodes and reflects our mission. Our tagline is “Creating a world where relationships never fade away.”



## **Directional Strategy & Execution**

Our directional strategy will differentiate Context from other products, where we emphasize deep, personal, and professional relationship management through a proactive, AI-powered assistant.

**Vision Statement** - To create a world where relationships never fade away.

**Mission Statement**- To empower people to maintain relationships in the ways that matter most.

### **Product Differentiation**

The AI-powered smart reminders and context-aware recommendations (e.g., suggesting check-ins, shared experiences) will help users strengthen their relationships and interact meaningfully thus sustaining the relationships organically. The intuitive conversation tracking and sentiment analysis will additionally help to provide relationship insights.

### **Ethical Data Usage**

Unlike the many social networking apps that monetize user data, the priority would be on transparency and privacy, ensuring that users feel secure in storing and managing their relationships. This is going to be achieved by implementing clear, user-controlled permissions for data access, reinforcing trust as a core brand value.

### **Focus on Well Being**

Given the rise of the "loneliness epidemic", the focus would be on advocating healthy relationship-building habits, incorporating features that promote balanced social interaction rather than addictive engagement loops.

### **Customer Retention**

Initial focus would be on building a strong user base and later introduce premium features that add significant value. This ensures high retention and prevents early-stage attrition due to monetization barriers.

### **Creativity vs Value Capture Strategy**

We provide both free trial and premium services. A freemium model could be used, where base features are free and power features could be locked behind a paywall. For example, in our premium tier, users gain access to AI-driven conversation starters tailored to recent trends and past discussions, enabling more personalized interactions. This exclusive feature helps users maintain deeper connections effortlessly.

## **POCD**

### **People**

Our team is structured to cover key aspects of product development, branding, and go-to-market strategy:

Brendan Thoreson (Team Lead) – Coordinates, tracks milestones, and ensures timely deliverables and project execution.



**Team 7:** Brendan Thoreson, Atulya Mohan, Medhavi Goyal, Jayson Zhu, Jing Yang

Atulya Mohan (Product Lead) – Defining JBTD (Jobs-to-be-Done), use cases, and product requirements.

Medhavi Goyal (Tech Lead) – Developing the MVP, system architecture, and user experience mapping.

Jayson Zhu (Branding Lead) – Building brand identity, positioning, and marketing communications.

Jing Yang (Marketing Lead) – Market research, user acquisition strategies, and competitive landscape analysis.

Additional advisors include Prof. Joe Brence and others in the team’s extensive network. We will also utilize target user surveys to refine product direction.

### **Opportunity**

**Market Need:** Managing relationships is becoming harder due to increased social connectivity, hectic schedules and fragmented communication channels.

**Growing Market:** Users seek to have a centralized relationship management tool. On an average there are 6.7+ social platforms per user.

**Competitive Advantage:** Unlike CRMs that focus on sales, the focus is to blend personal & professional relationship-building in a natural way.

### **Context**

**Technological Trends:** AI-driven personal assistants are gaining traction that help the users to streamline their connections be it in personal or professional lives.

**Social Trends:** Even with the presence of multiple social media apps there is a rising **loneliness epidemic** and increasing reliance on digital interactions for networking is unfruitful.

**Regulatory Challenges:** There is a high need for compliance with the **data privacy laws (GDPR, CCPA)** for trust-building with the users.

### **Deal**

**Revenue Strategy:** There will be a freemium model with premium features behind a paywall like calendar sync, expanded contacts, real-time location tracking. For future prospects various apps can collaborate for integration allowing them to pay for placement in our ecosystem.

**Growth Strategy:** The main initial focus would be on organic user adoption first, ensuring product-market fit before aggressive monetization takes place.

**Exit Strategy:** There can be potential acquisition by major CRM or networking platforms (e.g., LinkedIn, Salesforce).



## **Financials**

### **Revenue Projections**

Context's freemium business model will ensure we capture sufficient market share while generating revenue through paid subscriptions. With an estimated 945,000 users paying \$10/mo for the premium tier, and 630,000 users paying \$30/mo for the business tier, our projections forecast we will generate \$28.35 million in revenue within 3 years if we can capture 10% of the SAM.

### **Funding Ask**

To develop our MVP and bring Context to market successfully, we will require \$1 million in funding. This investment will be allocated as shown:

- MVP Development (\$500k): Software development, testing, and UX/UI
- Marketing and Customer Acquisition (\$350k): Targeted ad campaigns and PR
- Operations (\$150k): Admin expenses, hiring, legal fees, and other operational costs

In exchange for \$1 million, we are willing to offer 10% equity in the company, valuing the business at \$10 million. We believe that given the market opportunity, proposed solution, and founding team, we are well positioned to develop our MVP, go to market, and scale Context efficiently to deliver strong returns for our investors.



## Appendices

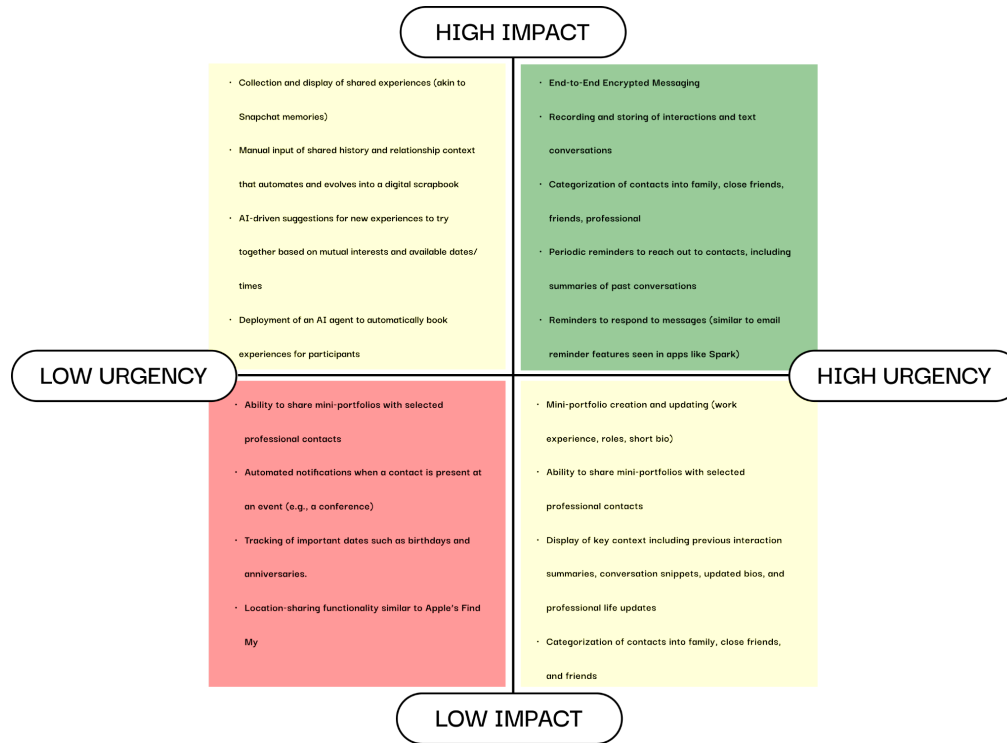


Figure 1: 2x2 grid for feature prioritization

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