PITCH DECK — ESTYM8

> *"**Product context:** Estym8 is **built from scratch** as an **AI-first** construction preconstruction platform—not a legacy takeoff stack with AI bolted on. **AI runs across the product**: bid-package ingestion and classification, multi-model takeoff and vision, plan intelligence, cross-file synthesis, Estee, estimate-to-submittal draft review, and optimization recommendations. Canonical framing: AI-first positioning."*

Confidential — for discussion only · Not an offer to sell securities.

Canonical deck: estym8.ai/docs/pitch-deck. **PDF handout:** estym8.ai/docs/estym8-pitch-deck.pdf.

ESTYM8

BID-READY TAKEOFFS & PLAN INTELLIGENCE FROM FULL PLAN SETS **AND** BID-PACKAGE FOLDERS

Multi-trade · USA · subscription SaaS · estym8.ai · **July 2026**

DEAL & FINANCIALS AT A GLANCE

For the finance-first reader — the business case up front; product detail follows.
*Aligned with the lean **investor fundraise brief** (NDA PDF) — not an older $2–3M seed narrative.*

THE ASK

~$500,000 — **~6–9 months** runway to calibration sign-off, permissioned case studies, and **first paying seats**

INSTRUMENT

- **Post-money SAFE** (valuation cap) — counsel to finalize.
- **Illustrative cap ~$8–10M** · new-money dilution **~5–6%**.
- Founder owns **100%** today and **retains majority** post-round; company has **no debt**.
- Standard SAFE rights: **pro-rata**, **MFN**, **information rights** (monthly seats/MRR/churn once billing). Optional **priced follow-on** later off traction.

WHAT THIS ROUND FUNDS

- **Founder + COO** operating runway (founder full-time; COO part-time ramp) — not a premature full executive bench.
- **AI compute & calibration** on real ground-truth plan sets.
- Product/infra, legal (SAFE), and a small reserve.
- **Key-person insurance** payable to investors (optional term; counsel).

EXIT STRATEGY (HOW WE FRAME THE OUTCOME)

Near term: finish **pipeline validation** → **first paying seats** → permissioned case studies.

Endgame: Strategic acquisition by a construction-software leader (Trimble, Procore, Autodesk-class)—not a standalone IPO. Public strategics at **~$8–12B** market cap are actively buying preconstruction and AI assets; see valuation §6.5.

REPORTING

- Monthly **MRR, paying seats, churn**, plus standard SAFE information and pro-rata rights.

STAGE (HONEST)

- **Pre-revenue / closed testing.**
- v1 in production; Stripe per-seat billing + plan gating **shipped**; founder-led calibration on real bid folders.
- **Design-partner engagements in progress**, including a commercial electrical-contractor beta — validated against multiple real bid folders.

USE OF FUNDS (~$500K · ≈ 6–9 MONTHS)

Bucket	Amount	%
Founder + COO stipends	**$320K**	64%
AI compute (calibration, pilots, regression)	**$90K**	18%
Product / infra / tools	**$45K**	9%
Legal (SAFE + counsel)	**$30K**	6%
Reserve	**$15K**	3%
Total	**$500K**	100%

Milestones this round funds (targets):

Window	Target
Month 3–4	Named projects **signed off** → permissioned case studies
Month 6	**First paying seats**; **~25–40** seats
Month 9	Path to **$5K+ MRR** — decision on extension or priced follow-on

Illustrative longer path (not this raise's budget; modeled for diligence):

	Month 6	Month 12	Month 18	Month 24	Month 60 (scale)
Paying seats	~30	~100	~185	~300	**~5,000**
MRR	**~$5K**	~$17K	~$31K	~$51K	**~$850K**

*Month 60 is a **scale scenario** (~2% of US estimator headcount), not this raise's forecast. See valuation §10.3.*

Deeper diligence: full team names/bios, equity grants, and term detail in the **lean investor fundraise brief** (NDA PDF only); market sizing + **Trimble/Procore public comps** in the valuation framework (**§6.5**, **§7**).

THE PROBLEM

- Commercial preconstruction = manual counting, retyped notes, and plan QA across **dozens of files** per pursuit.
- Bid deadlines and loaded labor ($50–80+/hr) mean missed bids and thin margin when counts or RFIs are wrong.
- Whole bid folders are normal; most tools still behave like **one PDF, one trade**.

WHO WE SERVE

- **Estimators & preconstruction leads** on **subcontractor and GC teams** — commercial, institutional, multi-family (**USA first**).
- **Subs** bidding to GCs **and GC in-house estimators** pricing from **design-team plan sets** (architect + engineering firms) — self-perform, owner bids, buy-out, and sub validation.
- **Multi-trade** pursuits on one product spine; **deepest calibration MEP-forward today**, expanding vertical depth on customer sets.
- **Not** small one-off residential remodel as primary ICP.

WHAT ESTYM8 DELIVERS

You bring	You get
One PDF or entire bid folder	Classified files, run plan, completed estimates
Drawing PDFs	Counts, materials, raceway/wire, concerns, draft RFIs
Full package	Verbatim sheet harvest, code-edition alerts, cross-file intelligence, narrative report
Priced estimate	Export + GC read-only link; submittal path (evolving)

One product for single-sheet and folder uploads — not two SKUs.

PRODUCT FLOW

1. **Project** → upload PDF or **folder (plans & docs)**
2. **Analyze → plan → execute** (discipline bundles where needed)
3. **Review** harvest, conflicts, RFIs, cross-file findings, narrative report
4. **Export** PDF / Excel / CSV · **Estee** run-grounded Q&A

Typical run: tens of minutes for substantial sets (varies by size & job count).

WHY WE WIN

- **Whole bid package** — not a single-discipline point tool
- **Traceability** — claims tied to what’s **printed on the sheets**
- **Cross-file intelligence** after folder completion — coordination & RFI seeds
- **Bid-bucket reconciliation** vs schedule/printed totals where supported
- **Speed** — days of manual work → same-day iteration
- **Continuous QC** — ground-truth library, user feedback, regression as models change

We are **not** underpricing vs value — **below legacy enterprise**, **above** simple counters.

HONEST SCOPE (TRUST)

- **Richest automation today:** MEP-forward calibration & ground-truth regression
- **Other trades** share the same folder pipeline; depth follows roadmap & customer sets
- **Submittal / spec AI:** review assist — **not** compliance sign-off
- **RFI drafts:** user sends through their project process; Estym8 does not track architect responses today

COMPETITIVE CONTEXT (PRICING)

Alternative	Typical cost	Estym8
In-house labor	$320–2,800+ / plan set	Fraction of labor; hours → minutes
Outsourced takeoff	$150–400+ / project	Subscription; in-house control
PlanSwift / Countfire	~$99–167 / mo	Premium vs point tools; folder-native
Trimble-class enterprise	$1,000s+/seat	10×+ lower entry; AI-native workflow

BUSINESS MODEL & PRICING (SEAT-BASED)

- **B2B subscription (Stripe) · per seat · USA**
- Meter **completed estimate runs** / month (single PDF = 1 run; multi-discipline folder = multiple runs)
- **Annual billing:** 15% discount · **Overage:** $35 / additional completed run

Tier	Seats	Monthly	Runs / mo
Solo	1	$179	8–10
Studio	2–5	$149/seat (from $298/mo)	12/seat pooled
Firm	6–15	$129/seat	15/seat pooled
Enterprise	16+	Custom	SLA + onboarding

ROI anchor: one saved estimator day ≈ **$320–500** → **one bid pays for the month**.

UNIT ECONOMICS (PLANNING)

Metric	Target
ARPS (avg revenue/seat)	**~$165–175** blended (Y1)
CAC	**<$900** (paid + content + demo)
Payback	**< 8 months**
Gross margin	Track AI COGS per run; improve with scale & caching

*ARPA = revenue per **account**; ARPS = revenue per **seat**.*

GO-TO-MARKET (USA) — THIS RAISE

Primary lever for this $500K: founder + COO–led demos and design partners — **not** a full paid-acquisition ramp (no dedicated ads line in use of funds).

- **Permissioned case studies** from validated projects → site, sales, onboarding
- **Live demo** for qualified leads (Calendly) on real bid folders
- **Warm intros** from investors and advisors valued over cold spend
- **Small paid test ($5–10K)** only after **one** public proof story — validate CAC before scaling
- ClearToPermit / ClearToIssue — **discovery only** (no ClearTo sales hire in this raise)

Subscriptions + overage runs are the revenue model. Paid acquisition is a later-scale lever, not this round's budget.

CONVERSION MODEL (ILLUSTRATIVE — POST FIRST PROOF)

Planning assumptions for **after** one public case study unlocks a small paid test — not the core of this raise.

Per **~1,000 site visits / month** (if/when ads run):

Stage	Rate	Result
→ Sign up	6%	60
→ Verified	55%	33
→ Demo / call	30%	10
→ **Paid (30d)**	~25% of trial path	**~2 new accounts/mo**

Path to **~25–40 seats by month 6** is **founder/COO-led**; paid scale is optional after proof.

GROWTH PLAN (ILLUSTRATIVE)

Blended ~$170/seat/mo · churn modeled **5% → 3%** over 3 years

NEAR TERM (SEED PROOF — MONTHS 0–24)

Month	Paying seats	MRR
6	30	**~$5K**
12	100	~$17K
18	185	~$31K
24	300	~$51K

SCALE PATH (YEARS 3–5 — IF GTM + CALIBRATION EXECUTE)

Month	Paying seats	MRR	ARR
36	800–1,200	~$136K–$204K	~$1.6M–$2.4M
48	2,000–2,500	~$340K–$425K	~$4.1M–$5.1M
60	**~5,000**	**~$850K**	**~$10.2M**

5,000 subscribers here means **5,000 paying seats** — roughly **2%** of US cost-estimator employment (BLS) or **1–2 seats** across a few thousand contractor accounts. Credible for vertical SaaS in a **~$22B/yr** loaded labor pool; **not** a year-1 target.

Replace with actuals as traction arrives.

TRACTION & PIPELINE PROOF

- **Stage:** v1 **in production**; **pre-revenue / closed beta** — Stripe per-seat billing and plan gating **shipped**
- **Folder pipeline audit (A0→A8):** Step-by-step verification on **31 real bid packages** — ingest, classify, plan, execute, cross-file. Living pipeline-proof tracker shared in diligence on request.
- **Completed walks: 7 Brew Littleton**, **Dogtopia Longmont** (full A0–A8); **Castle Pines** re-audit with SIP ingest fix (in progress)
- **Calibration (F4 vs human BOM):**
  - **Littleton:** F4a **sum|diff| = 143** · **15/40** exact lines — **demo-signed candidate** (~70% of gap = intentional estimator allowances, not drawn symbols)
  - **Dogtopia:** pipeline complete; accuracy sprint queued
  - **Ground-truth library:** GC commercial folders (Littleton, Castle Pines, Dogtopia, Copperview, Avanti, Affinity, ...) in automated compare pipeline
- **Design partners:** Commercial electrical-contractor beta on real pursuit folders; additional candidates lined up
- **Methodology:** Organic detection only — legend → glyph count → schedules → compare; human BOM **never seeds** pipeline numbers

ROADMAP (FINANCING ENABLES)

- **Trade vertical depth** on the shipped folder spine (concrete, structural, utilities, cross-discipline consistency)
- **Licensed cost data** (RSMeans-class) post-rights
- **Submittal workflow depth** (catalog, compliance exports, spec review)
- **Self-serve checkout & team admin** at scale

No fixed public dates — phased delivery driven by customer sets and regression quality.

MILESTONES THIS FINANCING ENABLES

1. **Month 6: 30+** paying seats · **~$5K MRR** · self-serve checkout · demo funnel + walkthrough video
2. **Month 12: 100+** seats · **~$17K MRR** · RSMeans integrated · trade depth v1 · **3+ permissioned case studies**
3. **Month 18: 185+** seats · **~$31K MRR** · annual contracts **35%+** of base
4. **Month 24: 300+** seats · **~$51K MRR** · seed proof complete
5. **Years 3–5 (scale path): ~5,000 seats · ~$850K MRR · ~$10M ARR** — ~2% of US estimator headcount; requires GTM scale post-calibration proof

PORTFOLIO SUITE (ESTYM8 ANCHORS THE RAISE)

One company · one plan-reading spine · four products. Raise use of funds is **100% Estym8**; Bodi + ClearTo* sit at **zero incremental valuation**.

Product	Brand / URL	Buyer	Job	Status
Estym8	estym8.ai	GC / estimators / precon	Full-project takeoff + estimate + plan intelligence + Estee + estimate-to-submittal	**Raise wedge** · v1 shipping / calibrating
Bodi	GetBodi / docs/bodi	ICT / LV / security / AV	Project brain → sources/claims → **Basis of Design (BOD)**	Pre-GA · entity upside
ClearToPermit	working brand	Cities / AHJs	Permit-package completeness + locale deficiency packages	Discovery (municipal path)
ClearToIssue	working brand	A/E design firms	Pre-issue / clear-to-issue design QA	Discovery

ESTYM8 SOLUTIONS (INSIDE THE PRIMARY PRODUCT)

Solution	What it does
Bid-folder takeoff	Classify → run plan → multi-trade organic counts + materials
Plan intelligence	Conflicts, code-edition alerts, draft RFIs, optimization notes
Estee	In-app AI assistant (Q&A / RAG; confirm-before-save on estimate edits)
Estimate-to-submittal	Catalog, packages, register / compliance matrix, merged PDF, draft spec AI
Narrative report	Multi-discipline Markdown / DOCX / PDF for the bid file

DO NOT CLAIM: **CITY BOM, AUTOMATIC PERMIT APPROVAL, OR PE STAMP REPLACEMENT.**
NOT IN THIS ENTITY / RAISE: MEOS **(FOUNDER-BUILT MASSAGE-SCHOOL OS) — SEPARATE PRODUCT, MENTIONED ONLY AS FOUNDER TRACK RECORD.**

OWNERSHIP & STRUCTURE

- **Entity** — one company holds **Estym8**, **Bodi**, and discovery SKUs **ClearToPermit** + **ClearToIssue**. Adjacent products at **zero incremental valuation**; raise use of funds is **100% Estym8-anchored**.
- **Estym8 equity** — **100% founder-owned** today; founder **retains majority** after this SAFE.
- **Estym8 debt** — **None.**
- **Instrument** — **Post-money SAFE** · illustrative **~$8–10M cap** · **~5–6%** new-money dilution (counsel to finalize).
- **Team** — founder full-time; COO + advisors **part-time / advisory** (roles only here; **names and bios under NDA**).
- **Reporting** — Monthly MRR, seats, churn; standard SAFE information and pro-rata rights.

THE ASK — ~$500,000 (POST-MONEY SAFE)

~6–9 months to finish calibration sign-off, permissioned case studies, and first paying seats. Founder retains majority.

Use of funds (~$500K):

Bucket	Amount	%
Founder + COO stipends	**$320K**	64%
AI compute (calibration, pilots, regression)	**$90K**	18%
Product / infra / tools	**$45K**	9%
Legal (SAFE + counsel)	**$30K**	6%
Reserve	**$15K**	3%

Estym8 has no corporate debt. Founder personal development-period obligations are **not** company liabilities (small market-reasonable founder runway in the stipend line).

INVESTOR RETURN & UPSIDE (SAFE → EQUITY)

- **SAFE** converts in a future priced round; illustrative **~$8–10M** post-money cap.
- Upside in an AI-native preconstruction platform + **suite optionality** (Estym8 + Bodi + ClearToPermit + ClearToIssue) strategics value for acquisition.
- **Pro-rata / MFN** per standard SAFE; optional priced follow-on when milestones warrant.
- Primary endgame: **strategic acquisition** (not IPO planning).

TEAM

Shannon Horn — Founder & CEO

- **25+ years** as designer, developer, author, speaker, and founder — AI-native products from UX through production code
- **Founder:** Estym8 (commercial plan-set preconstruction), Bodi (ICT project brain), MEOS (massage-school OS)
- **Portfolio & background:** shannonahorn.com
- **Contact:** shannon@estym8.ai

Operating model (public): founder is the **only full-time** operator today (product, engineering, pipeline calibration, fundraising). **COO** and **industry / technology advisors** contribute part-time — **names and bios under NDA** in the lean investor brief (not listed on this public deck).

Key-person insurance payable to investors (planned; counsel).

Hiring after revenue / priced follow-on: engineering, GTM, and ops tied to seats/MRR — not a large bench from this $500K.

MATERIALS FOR DILIGENCE & NEXT MEETING

- **Pitch deck (PDF, public)** — estym8.ai/docs/estym8-pitch-deck.pdf · live browser deck — **no team names**; roles only
- **Investor brief (PDF, confidential / NDA)** — full team names, equity, and raise terms; shared in diligence only
- **Pipeline proof tracker** — step audit + F4 scoreboard; shared in diligence on request
- **60–90s product walkthrough video** — available on request / with second meeting (not a dedicated paid-acquisition line in this $500K)
- **Live demo** — Calendly / screen-share on a real bid folder
- **Written diligence** — Investor overview · Valuation · Competitors · Folder workflow · Pricing
- **Definitive SAFE docs** — **Counsel to draft** after term alignment — legal budgeted in use of funds

LEGAL

This deck is **for discussion only**. Forward-looking statements are **plans, not guarantees**. Market, conversion, and return illustrations are **hypothetical**. **Not investment, tax, or legal advice. Not an offer** to sell securities — **consult qualified counsel** before any transaction.

Estym8 has no corporate debt. Founder personal obligations disclosed in use-of-funds narrative only.

Questions: Shannon Horn · shannon@estym8.ai · shannonahorn.com