

CAPACERA, INC.

Investor Brief

The Decision Layer for the Enterprise.

Stage	Pre-Seed / Seed
Raise target	\$750K minimum · \$1.2M ideal · Priced seed equity
Founded	2025 · Dover, DE · Denver, CO
Contact	info@capacera.com · capacera.com

01 · TRACTION & VALIDATION

Traction & Validation

A note on how we approach traction reporting: we won't populate this section until we have real engagement from real buyers. No vanity metrics, no unverified numbers, no promises about pipeline we haven't earned.

OUR COMMITMENT TO ACCURATE REPORTING

This section will be populated once the Technology Physical is released to design partners and we have actual engagement data from real buyers. We believe investors deserve accurate signals — not projections dressed up as traction. When the numbers are here, they will be real.

<hr style="width: 20%; margin: 0 auto;"/> <p>Active design partners</p> <p>Pending DP program launch</p>	<hr style="width: 20%; margin: 0 auto;"/> <p>Technology Physical runs</p> <p>Pending DP program launch</p>	<hr style="width: 20%; margin: 0 auto;"/> <p>LOIs collected</p> <p>Pending DP program launch</p>	<hr style="width: 20%; margin: 0 auto;"/> <p>ARR</p> <p>Pending DP program launch</p>
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WHAT IS LIVE NOW

The Technology Physical diagnostic is fully operational. The design partner program launched March 2026. The pipeline for design partner applications is live at capacera.com/design-partners. Traction data will be added to this section as design partner engagement is validated — not before.

02 · THE RAISE

The *Raise*

Seed target — minimum

Ideal / highest confidence

\$1.2M

Priced seed equity · 18-month runway

Full team + GTM included

AT \$750K

Engineering begins

Phase 2 engineering starts. Lead developer hired. SOC 2 Type I in motion. Design partners converting. Founder salary starts.

AT \$1.2M

Full team + GTM

Full engineering team. GTM hired at month 13. Benchmark data acquisition funded. Legal and IP fully covered.

WHY NOT \$750K ALONE

Two outcomes

\$750K reaches PMF. \$1.2M positions the Series A on recurring revenue — not promise.

03 · USE OF FUNDS

Use of *Funds*

Four priorities: engineering headcount, SOC 2 certification, benchmark data, and founder salary. Lean overhead is a feature, not a constraint.

Category	Estimate	Notes
Engineering (lead dev + mid-level)	\$320–380K	Lead dev from seed close. Mid-level at month 7. Mix FTE and contract.
Founder salary (18 months)	\$200K	\$120K/yr months 1–6; \$150K/yr from month 7. Deferred pre-seed.
SOC 2 Type I + II (Vanta + audit)	\$35–50K	Vanta ~\$15K/yr. Audit firm ~\$20–30K. Two audit cycles.
Infrastructure (AWS, Cloudflare)	\$40–60K	18-month estimate. Scales \$1.3K to \$5K/month with customer growth.

Benchmark data & research	\$30–50K	Methodology, validation, industry partnerships, academic research partner.
Legal (IP, policies, enterprise MSAs)	\$25–40K	SOC 2 policies, DPAs, MSA templates, patent filing (ADR-004).
GTM + enterprise sales	\$50–80K	First enterprise AE or SDR + marketing. Begins month 13.
Buffer (10%)	\$60–80K	Engineering overruns, second audit cycle, unplanned scope.

TOTAL REQUIRED	\$760K–940K	\$750K minimum · \$1.2M recommended
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CAPITAL EFFICIENCY

Full platform stack — automation pipelines, AI integration, database architecture, frontend UI, complete assessment engine — built largely solo by the founder. Pre-seed engineering cost is near zero. Post-seed, the founder transitions fully to product strategy, enterprise GTM, and fundraising.

04 · FINANCIAL FORECAST

Financial

Forecast

Conservative. Built bottom-up from pilot conversion assumptions. Series A readiness at month 18 based on \$300K+ ARR, 15 customers, SOC 2 Type II, and 100%+ NRR.

Period	Activity	Revenue	Why
Months 1–6	Building + SOC 2 Type I	\$0	Cannot handle customer data before SOC 2 Type I
Months 7–12	Observation period	\$0–10K	1 on-prem deal possible if timing aligns
Month 13	SOC 2 Type II; pilots go live	\$50K	5 pilots at \$10K each
Month 14	Conversions + new sales	\$125K	3 pilot conversions + 2 new customers
Month 15–16	Continued sales	\$100K	4 new customers
Month 17–18	Series A close	\$50K	2 new customers
TOTAL	Conservative target	\$325K ARR	15 customers · Series A ready

\$300K+ ARR at month 18 Investor req: \$250K+	15 Enterprise customers Investor req: 10+	100%+ NRR target Required	20+ Benchmark companies Data moat proof
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05 · SERIES A PATH & LONG-TERM TRAJECTORY

Series A Path &

Long-Term Trajectory

Designed for IPO-scale outcomes — not a single exit path. Each raise triggered by validated revenue milestones, not time-based targets.

Seed (now)	Month 18	Month 30	Month 42	Month 54+
\$750K–1.2M	\$1.75M	\$6M	\$11M	IPO-ready
Post: ~\$4–5M	Series A · Post: ~\$11M	Series B · Post: ~\$35M	Series C · Post: ~\$80M	\$375M+ post · Category position

06 · MODULE ROADMAP

Module

Roadmap

Six modules sequenced by valuation impact and integration potential. Infrastructure & TCO and AI & Automation are feature additions within existing modules — not standalone builds.

Module	Focus	Status
Technology Physical™	Application rationalization · Stack redundancy · Integration health · Maturity scoring	● LIVE
■ Technology module dashboard & membership area	Infrastructure & TCO coming · Member portal Q2 2026	Q2 2026
Process & Workflow	Workflow mapping · Automation gaps · Manual load index · AI readiness · AI & Automation coming	Q3 2026
Finance	Reporting latency · Forecast accuracy · Finance ops health	Q3 2026
Sales	Pipeline visibility · CRM health · Revenue ops maturity	Q4 2026
HR	Headcount planning · Retention health · Hiring ops efficiency	Q1 2027
Operations	Project, Product, Supply Chain, Manufacturing	Q2 2027

Frictionless Overview — Unified valuation signal across all completed modules

07 · PRICING MODEL

Pricing *Model*

Three-tier model with high initial ACV, recurring subscription revenue, and natural expansion through additional diagnostic modules.

PRE-DECISIONAL

Pricing ranges below represent current thinking and are subject to change based on market validation, design partner feedback, and advisor input. These should not be treated as committed commercial terms.

ENTERPRISE CORE

\$50K–\$150K+ / year

PE firms, strategic acquirers, investment banks, M&A; advisory firms. Recurring need — evaluated on every target. PaaS setup \$15K–\$35K. Enterprise access \$50K/year. Strategic partner \$100K/year.

MID-MARKET

\$3K–\$25K / deal

Growth-stage companies preparing for fundraise or acquisition. Fast operational assessment before a buyer runs one on you. PaaS setup \$3K–\$5K, subscription \$25K/deal.

DESIGN PARTNER / SMB

Free → Custom

Design partners receive free access during the validation phase. Individual operators and advisors building operational discipline. Feeds benchmark database. Validates demand signal at scale.

08 · NEXT STEPS

Next

Steps

Four paths to move forward. Choose what fits your current stage of interest.

DOWNLOAD BRIEF**This document**

You already have it. Share it with your partners or refer back to the financial model at any time.

REQUEST DATA ROOM**Full data room access**

Includes cap table, financial model, technical architecture documents, and advisor briefings. NDA required.
capacera.com/data-room-request

SCHEDULE A MEETING**Book time with the founder**

30-minute introductory call or 60-minute deep dive — your choice. Direct conversation, no slides required unless you want them.

VIEW PRODUCT DEMO**Platform and module walkthrough**

See the Technology Physical diagnostic in action. Understand the data model, the benchmark layer, and the enterprise roadmap.

CAPACERA, INC.

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capacera.com

Dover, DE · Denver, CO

Shana — Founder & CEO

25 years enterprise technology. \$40M in verified savings. Full platform built largely solo — automation, AI, database, frontend, assessment engine.

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