THREE MISALIGNMENT HYPOTHESES

Project Compass — where value, accountability, and market gravity may be separating

Each hypothesis pairs what Project Compass communicates with what independent market evidence shows. The tension between them identifies where deeper investigation can create strategic value.

01

RECOGNITION

Does the way Project Compass explains its technology match the way buyers recognize and evaluate the value?

Company says. Service as Software: integrated IT, data, AI, and agentic capabilities.
Market shows. Buyers prioritize ROI, AI-ready data, integration, speed, governance, and risk.

TENSION

> ***Project Compass explains a category and architecture while the market evaluates outcomes and business value.***

WHY IT MATTERS.

Buyers must recognize the value before they evaluate the technology.

02

TRUST

When Project Compass says, "we own the outcome," what level of accountability does the buyer believe that promise carries?

Company says. Full accountability: “we own it, we fix it.”
Market shows. Buyers expect measurable commitments and remedies; public proof is narrower than the promise.

TENSION

> ***The accountability promise is broad while the accountability a buyer can independently verify is narrower.***

WHY IT MATTERS.

Accountability differentiates only when buyers can trust and defend the promise.

03

MARKET GRAVITY

Across Project Compass's many routes to market, where is the market pulling the company through?

Company says. Multiple routes: direct, fractional, PE/M&A, communities, MSP, and channel.
Market shows. Routes are visible; which consistently drives adoption remains unproven.

TENSION

> ***Project Compass pursues multiple routes while its strongest route to adoption remains unclear.***

WHY IT MATTERS.

Proven market pull determines where commercial resources should concentrate.

WHERE THIS LEADS

These are not conclusions. They are the three places where **Project Compass**’s market story shows enough separation to warrant deeper investigation. A **Strategic Navigation Assessment** pressure-tests each one to determine what buyers recognize, what they trust, and where genuine market gravity exists.

CXOCentric | Strategic Navigation Assessment | Sample

STRATEGIC NAVIGATION ASSESSMENT

Captain's Brief

Project Compass · August 2026

> **The market is advancing faster than Project Compass can prove readiness.**

> **Buyers hit friction at purchase and delivery, where trust is won.**

> **Project Compass’s biggest gap is commercial proof, not product breadth.**

> **Buyers can disqualify Project Compass before reaching its strongest advantage.**

> **Monday morning: prove trust, sharpen the message, then scale access.**

CXOCentric | Strategic Navigation Assessment | Sample

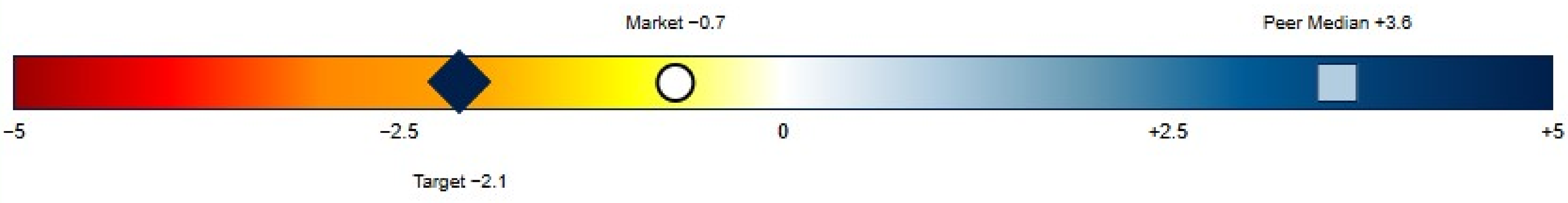
Sea State Index

Target Company: Project Compass | **Framework:** OWF 9.0 Stage 2 Rough Seas | **Date Locked:** 2026-08-12 | **Data Source:** rough_seas_locked.json

HERO GAUGE — SEA STATE INDEX (−5 to +5)

MILDLY CHOPPY WATERS

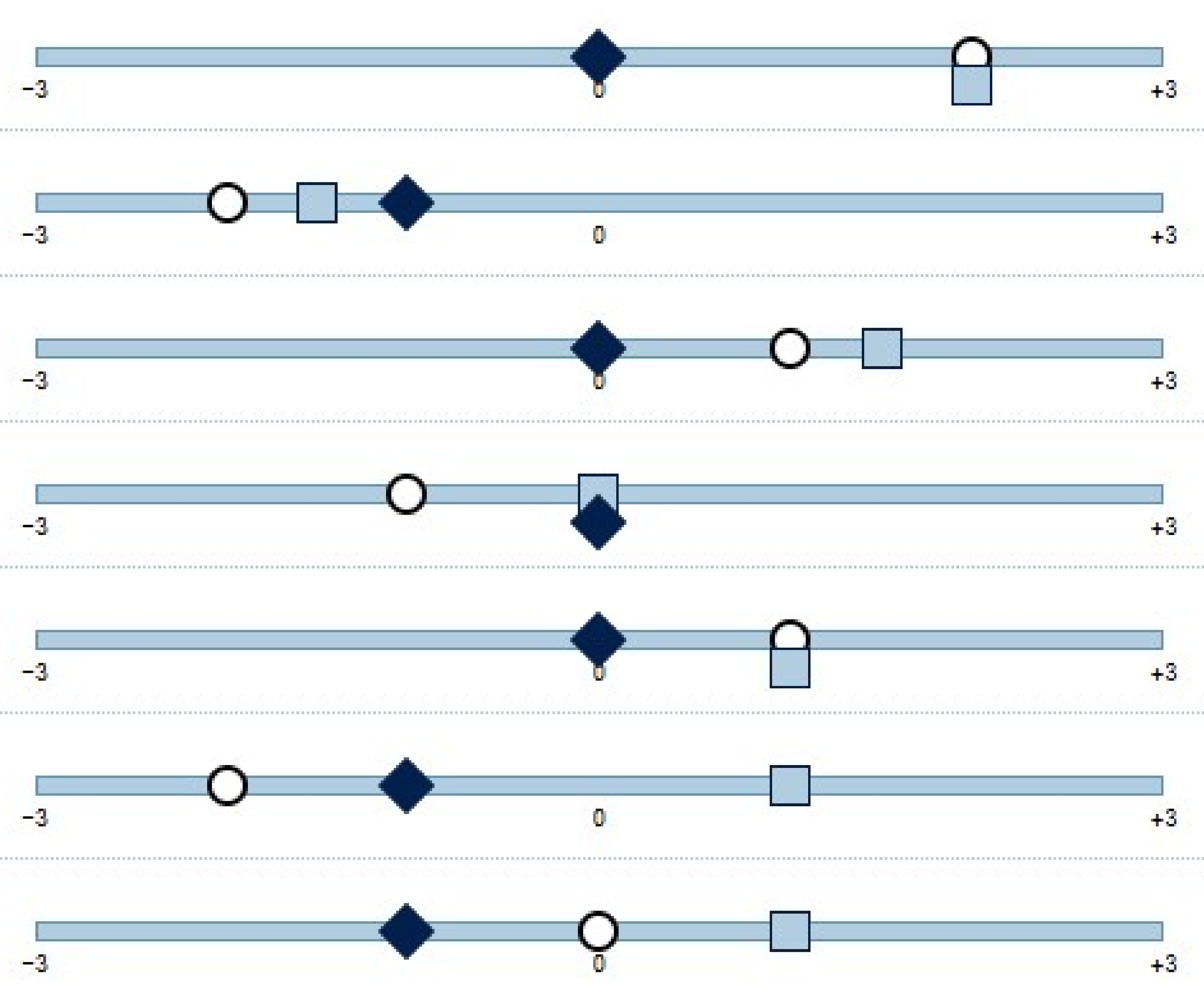
Peer median above market baseline; target company below market baseline.



○ Market (empty circle) ▢ Peer Median (filled square) ◆ Target Company (filled diamond)

Sea State Index = (Σ 7 force scores ÷ 7) × 5. Bounded −5 to +5.

Sea State Force Stack



Force	MKT	PEER	TGT
1 · Market Activation	+2	+2	0
2 · Competitive Intensity	−2	−1.5	−1
3 · Regulatory	+1	+1.5	0
4 · Technological	−1	0	0
5 · Structural	+1	+1	0
6 · Execution	−2	+1	−1
7 · Market Gravity	0	+1	−1

Market Gravity marker semantics: *Market* = category-level baseline for natural buyer discovery and consideration · *Peer Median* = median Market Gravity of the governed peer set · *Target Company* = Market Gravity of Project Compass.

Force Stack scale: −3 to +3 per force. Distinct from Hero Gauge's −5 to +5.

Executive Interpretation

Project Compass operates in an activated but demanding market. Independent evidence supports two immediate pressures: weaker observable **Market Gravity** than established peers, and elevated **Execution** exposure created by a high-trust buying environment combined with broad accountability positioning. **Competitive Intensity** adds additional pressure. Regulatory, Technological, Structural, and Project Compass-specific Market Activation positions remain unresolved where evidence is insufficient and should not be interpreted as demonstrated weakness.

The most important Stage 2 finding is therefore not that Project Compass is broadly disadvantaged. It is that the market opportunity is active while Project Compass's externally observable proof, trust signals, and demonstrated routes of commercial pull have not yet reached the evidence density of established peers.

Comparative separation: Project Compass sits approximately 5.7 Sea State Index points below the peer median on the bounded −5 to +5 index. This separation must not be characterized as demonstrated disadvantage across all forces; several Project Compass zero cells are evidence-neutral per BEEP v2.0.

Peer Roster

BI / ANALYTICS COMPARATOR

Peer Alpha

Public mid-market BI platform · FY2026 revenue $317.5–$318.5M · analyst coverage present

BI / ANALYTICS COMPARATOR

Peer Beta

Mid-market embedded analytics · pricing $100K–$150K annual typical · established review presence

MSP CONSOLIDATOR COMPARATOR

Peer Gamma

Mid-market MSP · $65M funding round + acquisition activity · trade press coverage

PE-ADJACENT FP&A COMPARATOR

Peer Delta

Series B $29M · named customer references · CFO shortlist inclusion

Pressure benchmark (not scored as direct peer): Scale Benchmark — 443 documented customers; used solely as down-market pressure/substitute reference per Stage 2 peer-set locking.

Force Comparison Table

Force	MKT	PEER	TGT	Market Rationale	Peer Median Basis	Target Company Rationale
1 · Market Activation	+2	+2	0	68% AI adoption growth YoY (Fed); 41% of $50M–$500M firms with AI in production (Deloitte); Gartner $2.52T 2026 AI spend, +44% YoY.	Peer Alpha revenue reaffirmed; Peer Gamma funded + acquiring; Peer Delta Series B with named customers.	One publicly named advocate post-rebrand; inherited base pre-existed rebrand; BEEP forces zero — **not proven either way**.
2 · Competitive Intensity	−2	−1.5	−1	Vendor consolidation is 2026's defining software theme; AlixPartners projects 30–40% M&A volume growth in mid-market software.	BI peers on public comparison surfaces; MSP consolidation active but delivery-anchored; FP&A wedge crowded.	Spans multiple buying categories; each carries intense rivalry — MODERATE evidence supports −1.
3 · Regulatory	+1	+1.5	0	EU AI Act transparency effective Aug 2026; 72% of buyers require SOC 2 pre-contract; Gartner: >50% of large enterprises face mandatory AI audits.	Peer Alpha / Peer Beta have SOC 2 Type II + ISO; Peer Gamma and Peer Delta maintain baseline compliance.	Positive Technology Pledge signatory (MODERATE); no SOC 2 Type II independently confirmed (WEAK); BEEP forces zero — **not proven either way**.
4 · Technological	−1	0	0	Agentic frameworks commoditizing; hyperscaler pushdown intensifies; an adjacent AI-ready data provider named a 2026 Gartner Cool Vendor.	Established peers hold ground; Peer Delta AI-native in legacy FP&A segment.	Core data architecture not publicly disclosed (proprietary vs. wrapper unknown); BEEP forces zero — **not proven either way**.
5 · Structural	+1	+1	0	Managed-services stickiness real; consolidation favors bundled providers (KPMG 2026, TSIA).	Multi-year contracts (Peer Alpha); OEM lock-in (Peer Beta); MSP installed-base acquisition (Peer Gamma); workflow embedding (Peer Delta).	Bundle structure suggests stickiness on paper; adoption evidence too thin; coverage-flagged; BEEP forces zero — **not proven either way**.
6 · Execution	−2	+1	−1	74% CIO regret; 50% CFOs pull AI funding without 12-month ROI; KPMG: 91% see managed services as critical for agentic AI delivery.	Peer Alpha track record; Peer Gamma delivery-oriented model; Peer Delta marquee customers.	Market imposes high execution/trust threshold. Broad accountability promises with narrower publicly verifiable commitments create credible execution *exposure*. Inherited delivery history partially offsets. Net −1 — **exposure, not observed buyer behavior**.
7 · Market Gravity	0	+1	−1	G2 2026: evaluation is longest buying phase (40%); buyers self-shortlist via reviews, analyst signals, peer references.	Peer Alpha / Peer Beta have review + analyst presence; Peer Gamma trade coverage; Peer Delta analyst + accelerator adjacency.	Materially less independently observable signaling than peer set: no identified review-platform presence, limited analyst visibility, one named post-rebrand advocate, emerging community/event presence. Supports moderate negative pressure, not severe buyer avoidance.

Evidence Grade Notes

Forces 1, 3, 4, 5 target scores at 0 are **evidence-neutral per BEEP v2.0** — WEAK/INFER evidence forces zero; these must not be interpreted downstream as demonstrated weakness. Forces 2, 6, 7 target scores are supported by STRONG or MODERATE evidence and stand as governed pressure signals.

Quality Gate Audit

Pre-scoring validity	PASS	Frame validity	PASS
Competitor frame validated	PASS	7-force sufficiency	PASS
Peer coverage (≥3 per force)	PASS	BEEP v2.0 zero-rule enforcement	PASS
Force-governance rule	PASS	Structural coverage flag disclosed	PASS
No target-owned buyer-behavior claims	PASS	Headline band from Market index only	PASS
Marker-collision rule applied	PASS	Two-line summary format	PASS
Dual-scale labeling (Hero −5/+5, Stack −3/+3)	PASS	Force Comparison Table covers all 3 markers	PASS
Section order preserved	PASS	No retired v8.0 naming in output	PASS

CXOCentric | Strategic Navigation Assessment | Sample

Buyer Value Matrix

Target Company: Project Compass | **Framework:** OWF 9.0 Stage 3 (Market) + Stage 4 (BEEP v2.0) | **Market Boundary:** US mid-market $50M–$500M · managed data + AI + IT operations | **Date Locked:** 2026-08-12

Value Dimension ↓ Buyer Journey Stage →	PURCHASE	DELIVERY	USE	SUPPLEMENTS	MAINTENANCE	EXIT
Productivity	S WH +1	S WH −1	S = +1	S WH +1	— n/a —	— n/a —
Simplicity	C WH −2	C WH −2	S WH 0	S WH −1	S WH −1	C WH −2
Convenience	— n/a —	S WH −1	S WH +1	S WH +1	S WH +1	— n/a —
Risk Reduction	C WH −2	C ▲ −2	S WH −1	— n/a —	— n/a —	— n/a —
Political / Social	— n/a —	— n/a —	— n/a —	— n/a —	— n/a —	— n/a —
Quality	S WH −1	S WH −1	S WH 0	— n/a —	— n/a —	— n/a —

Color = Market Value Effect · Left Badge = Evidence Strength · Right Badge = Company Position vs. Market (or Withheld)

MARKET VALUE EFFECT (Stage 3)

- +3 Very positive market pull
- +2 Strong positive
- +1 Modest positive
- 0 Affirmative neutral (evidenced)
- −1 Modest friction
- −2 Strong friction
- −3 Severe friction
- — Insufficient market evidence

EVIDENCE STRENGTH (Stage 4 BEEP)

- C CONFIRM — WEC ≥ 3.0
- S SUPPORT — WEC ≥ 1.5
- W WEAK — cannot support nonzero
- — No score (dashed cell)

COMPANY POSITION vs. MARKET (BEEP)

- ▲ Above market — evidenced
- = At parity — affirmatively evidenced
- ▼ Below market — evidenced
- WH Withheld — insufficient company evidence

Withheld is not parity. It signals that BEEP evidence cannot substantiate a comparison — not that Project Compass is weak or strong at this cell.

Executive Interpretation

BEEP produces only two defensible Project Compass company-position findings across the 20 market-scored cells: **parity at Productivity × Use** and an **above-market position at Risk Reduction × Delivery**. Eighteen company positions remain withheld because available independent evidence does not meet the required threshold.

This is an evidence finding, not evidence of underperformance. Project Compass's independently observable buyer evidence substantiates its relative market position in only 2 of the 20 market-scored cells. The remaining 18 company positions are unresolved under BEEP evidence standards.

Project Compass's strongest independently observable buyer proof is concentrated around **implementation risk reduction and realized operational visibility**. This concentration was not manufactured from the three Stage 1 candidate tensions — it emerged from the evidence.

CXOCentric | Strategic Navigation Assessment | Sample

Matrix Counts

6 Positive market pull	2 Neutral affirmative	12 Negative friction	16 Insufficient evidence (—)
1 Company: Above market	1 Company: At parity	0 Company: Below market	18 Company: Withheld

Defensible Company-Position Findings (2)

Cell	Market	Project Compass	Position	Basis (BEEP-qualified)
Productivity × Use	+1	+1	At parity	P1 — Scott Duke direct Use-phase utility statement ("real visibility into my operations"). WEC 1.5 (Primary). BEEP class: SUPPORT.
Risk Reduction × Delivery	−2		Above market	Project Compass has primary evidence sufficient under BEEP to support an above-market score at Risk Reduction × Delivery. Scott Duke's reported implementation comparison ("12 weeks vs. three vendors couldn't in five years") is the strongest direct Project Compass-specific buyer-outcome evidence in the current research set. WEC 1.5 (Primary). S3 (Legacy Delivery Organization delivery organization) is recorded as contextual only, not primary basis.

Withheld Cells — Why (18)

Cell	Market score	Withheld reason
Productivity × Purchase	+1	Advocacy evidence does not establish productivity as a purchase criterion
Productivity × Delivery	−1	Inherited capability ≠ realized delivery-phase productivity
Productivity × Supplements	+1	No Project Compass supplement-outcome evidence available
Simplicity × Purchase	−2	Absence of positive evidence does not defend company position at market magnitude
Simplicity × Delivery	−2	Capability inheritance alone insufficient
Simplicity × Use	0	No Project Compass Use-phase simplicity evidence
Simplicity × Supplements	−1	No Project Compass supplement complexity evidence
Simplicity × Maintenance	−1	Capability inheritance alone insufficient
Simplicity × Exit	−2	No Project Compass exit-phase evidence
Convenience × Delivery	−1	Capability inheritance alone insufficient
Convenience × Use	+1	Available evidence addresses visibility, not specifically convenience
Convenience × Supplements	+1	No Project Compass supplement-convenience evidence
Convenience × Maintenance	+1	Capability inheritance alone insufficient
Risk Reduction × Purchase	−2	Directional exposure signals do not affirmatively establish company position at market magnitude
Risk Reduction × Use	−1	Opposing directional signals; no affirmative parity evidence
Quality × Purchase	−1	Absence of independent review signaling ≠ inferior product/service quality
Quality × Delivery	−1	Capability inheritance alone insufficient
Quality × Use	0	No Project Compass Use-phase quality evidence

Stage 1 Tension Traceability

T1 (Broad accountability promise vs. verifiable accountability): Unresolved. Localizes at Stage 2 Execution force, not at any BVM cell. No cell-level below-market Project Compass score is defensible on T1 evidence alone.

T2 (Stated routes to market vs. observed adoption routes): Unresolved. Localizes at Stage 2 Market Gravity force, not at any BVM cell.

T3 (Category/architecture emphasis vs. buyer outcome recognition): Unresolved. No Project Compass-specific buyer voice sufficient to localize the tension in a specific cell exists.

None of the three candidate tensions was forced into the BVM. The two defensible findings emerged independently and were not manufactured from prior hypotheses.

Quality Gate Audit

Stage 3 lock verified (6/2/12/16)	PASS	Stage 4 ledger complete (20/20)	PASS	No WEAK/INFER supporting nonzero	PASS
Parity requires affirmative evidence	PASS	Market score never defaults company score	PASS	Inherited capability ≠ realized performance	PASS
Withheld visually distinct from parity	PASS	Withheld visually distinct from zero	PASS	Dash cell visually distinct from scored	PASS
Market score = dominant cell treatment	PASS	Evidence + position = small indicators only	PASS	No narrative text inside cells	PASS
Return-to-Stage-3 flags resolved to —	PASS	No Stage 1 tension forced into cells	PASS	Palette compliance (no grey, negative graph only in cells)	PASS

Project Compass — Priority Action Table (RSEI)

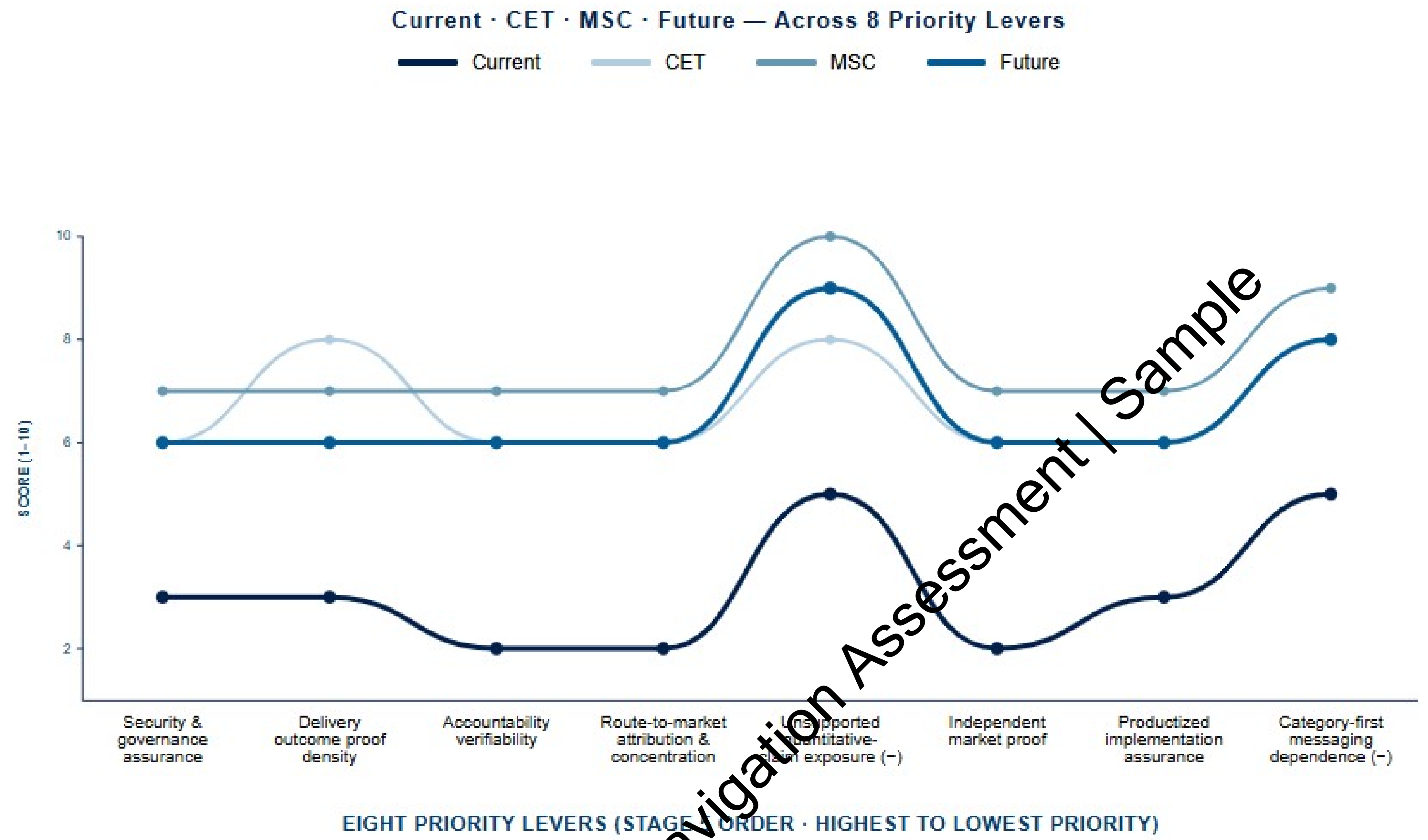
Framework: OWF 9.0 Stage 5 · BEEP Protocol v2.0 | **Date Locked:** 2026-08-13 | **Planning Horizon:** 12–24 months

Lever	Current	CET	MSC	Future	Priority	Action	Constraint
Security and governance assurance	3	6	7	6	9	Elevate	Third-party assurance status is not fully visible in the research; certification scope, timing, and internal readiness remain unknown.
Delivery outcome proof density	3	7	7	6	9	Elevate	Independently observable buyer proof is concentrated in a small number of examples; customer participation and reference rights may constrain proof-generation velocity.
Accountability verifiability	2	6	7	6	8	Elevate	Private MSA/SLA terms remain unknown; stronger public or commercial accountability must remain legally and operationally supportable.
Route-to-market attribution and concentration	2	6	7	6	8	Innovate	Route-level pipeline, conversion, velocity, retention, expansion, and partner-sourced revenue data are not publicly available; concentration decisions require internal GTM data.
Unsupported quantitative-claim exposure (−)	6	3	1	2	8	Remove	High-specificity claims require defensible comparator baselines and substantiation before functioning as buyer proof.
Independent market proof	2	6	7	6	7	Elevate	Review, analyst, and independent reference development depends partly on customer participation and external publication cycles.
Productized implementation assurance	3	6	7	6	7	Innovate	Inherited delivery capability does not by itself establish a repeatable post-acquisition Project Compass commercial construct; productization requires operational and commercial standardization.
Category-first messaging dependence (−)	6	4	2	3	6	Shrink	Project Compass-specific buyer reaction to category terminology remains unproven; reduction should preserve terminology that demonstrably improves buyer understanding.

CXOCentric | Strategic Navigation Assessment | Sample

Project Compass — Course Correction Canvas

Framework: OWF 9.0 Stage 6 · Four-Series Governed Comparison | **Date Locked:** 2026-08-13 | **Data Source:** ccc_locked.json (reads rsei_locked.json)



Companion Table — Traceability

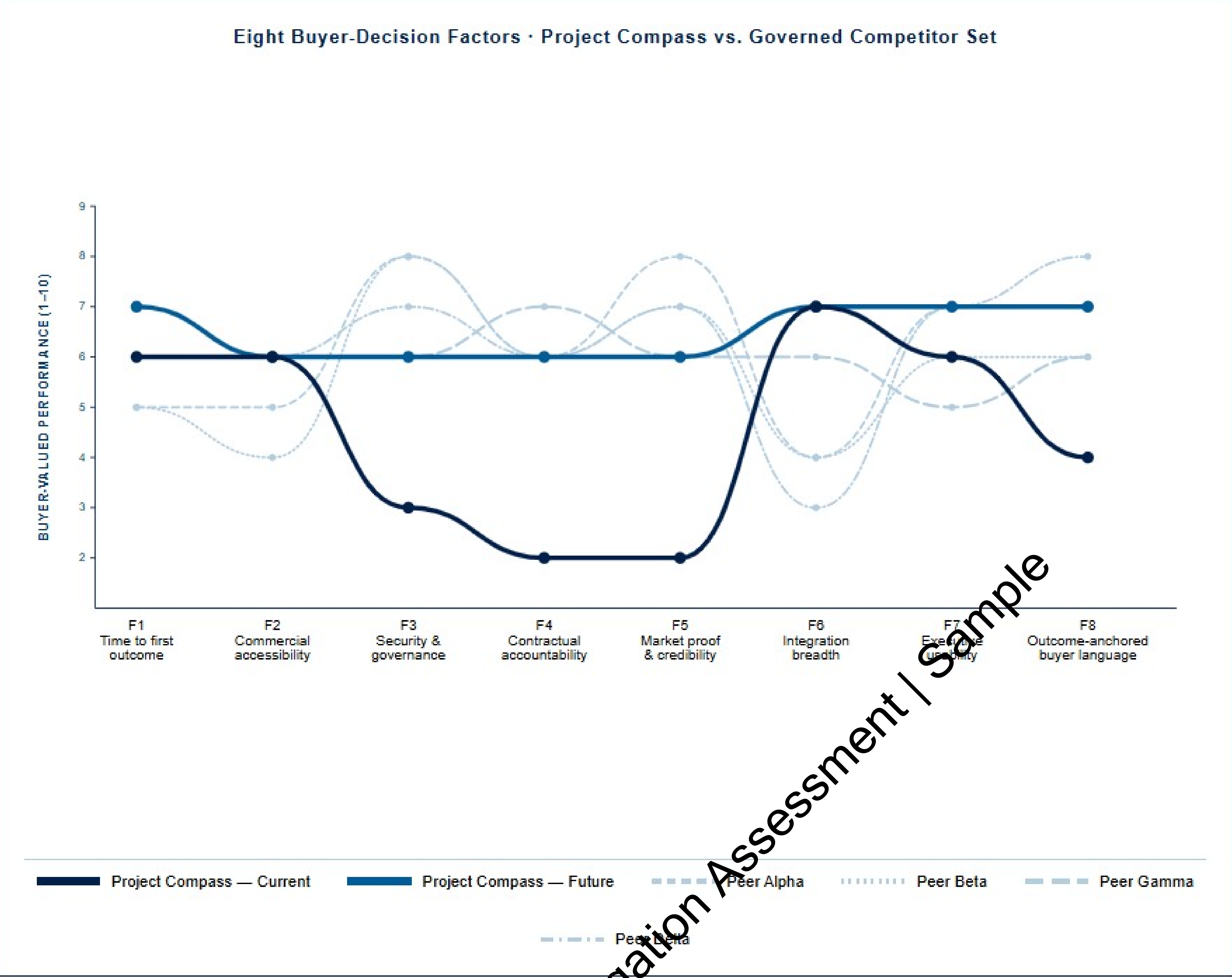
Lever	Current	CET	MSC	Future	Δ	Move	Interpretation Anchor
Security and governance assurance	3	6	7	6	+3	Elevate	Structural vulnerability · Proof gap · Deal friction · Strategic shift
Delivery outcome proof density	3	7	7	6	+3	Elevate	Proof gap · Strategic shift
Accountability verifiability	2	6	7	6	+4 ⚑	Elevate	Structural vulnerability · Proof gap · Deal friction · Trust-breaking (T1) · Strategic shift
Route-to-market attribution and concentration	2	6	7	6	+4 ⚑	Innovate	Proof gap · Strategic shift (T2)
Unsupported quantitative-claim exposure (−)	6	3	1	2	−4 ⚑	Remove	Proof gap · Trust-breaking
Independent market proof	2	6	7	6	+4 ⚑	Elevate	Proof gap · Strategic shift (T2-adjacent) · Structural vulnerability
Productized implementation assurance	3	6	7	6	+3	Innovate	Structural vulnerability · Strategic shift
Category-first messaging dependence (−)	6	4	2	3	−3	Shrink	Proof gap · Strategic shift (T3)

⚑ = BEEP v2.0 ±3 delta-review flag preserved. Delta traces to evidenced Current/CET/MSC; flag recorded, not reducing scores. Inverse-scale levers marked (−); Δ shows raw-score direction of travel.

CXOCentric | Strategic Navigation Assessment | Sample

Project Compass — Strategy Canvas

Framework: OWF 9.0 Stage 7 · Buyer-Decision Positioning Map | **Date Locked:** 2026-08-13 | **Data Source:** strategy_canvas_locked.json



CXOCentric | Strategic Navigation Assessment | Sample

Position Read

Structural strength within the governed competitor set: F6 Integration breadth. Project Compass's integrated data + IT + AI bundle is the strongest relative position identified for Project Compass within the governed competitor set. No exclusivity beyond that set claimed.

Convergence toward competitor viability: F3, F4, F5. The Future path closes procurement-gate factors — security & governance, contractual accountability, and market proof — toward the competitor mid-band. It is shortlist viability, not leapfrog.

Held positions with modest gain: F1 Time to first outcome and F7 Executive usability. Project Compass holds ground against the competitor set; Future rises modestly per evidence.

Directional framing shift: F8 Outcome-anchored buyer language moves from below-mid to competitor mid via the RSEI Shrink of category-first messaging dependence and Remove of unsupported quantitative-claim exposure. F2 Commercial accessibility stays flat by design — accessibility is preserved, not amplified through unsupported claims.

Companion Table — Factor Scores & Interpretation Anchors

Factor	P. Current	P. Future	Peer Alpha	Peer Beta	Peer Gamma	Peer Delta	Interpretation Anchor
F1 Time to first outcome	6	7	5	5	6	7	Strategic shift · Structural vulnerability · RSEI trace: Productized implementation assurance
F2 Commercial accessibility / entry economics	6	6	5	4	6	6	Belief condition. Commercial accessibility is preserved; this is not a TCO claim. Removal of unsupported savings claims does not create a cosmetic increase.
F3 Security & governance assurance	3	6	8	8	6	7	Proof gap · Trust-breaking moment · Structural vulnerability · RSEI trace: Security and governance assurance
F4 Contractual accountability	2	6	6	6	7	6	Dominant tension T1 · Trust-breaking moment · Structural vulnerability · RSEI trace: Accountability verifiability
F5 Market proof & credibility	2	6	8	7	6	7	Proof gap · Structural vulnerability · RSEI trace: Delivery outcome proof density + Independent market proof
F6 Integration breadth (data + IT + AI)	7	7	4	4	6	3	Strategic shift. Strongest relative position identified for Project Compass within the governed competitor set.
F7 Executive usability & legibility	6	7	7	6	5	7	Belief condition. Executive-facing KPI and dashboard capabilities provide the current evidence basis; Future reflects a modest evidence-consistent improvement.
F8 Outcome-anchored buyer language	4	7	7	6	6	8	Belief condition · Proof gap · Dominant tension T3 · RSEI trace: Category-first messaging dependence (-) + Unsupported quantitative-claim exposure (-)

Every score cell now explicitly contains its numeric value. There are 48 numeric cells: 8 factors × 6 scored entities, and none should render blank.

Project Compass Current = **#011f4b** · Project Compass Future = **#005b96** · Competitors rendered in comparison blue (**#b3cde0**) differentiated by line weight, dash pattern, and markers per OWF_VISUAL_DOCUMENT_AUTHORITY_v9.0. Grey prohibited.

OWF STAGE 7B

Project Compass — Strategic Reframing

Framework: OWF 9.0 Stage 7B · Company-Role Reframing Options | **Date Locked:** 2026-08-13 | **Data Source:** category_redefinition_locked.json

Four structurally justified reframing options for Project Compass. Each reframe is designed to make the company more legible to buyers and more testable in downstream stages. One option is preferred; preference is not proof. Stage 8 and Stage 8B will test whether the customer and pursuit reframes cohere around the preferred option — or challenge it.

OPTION 1 — **PREFERRED REFRAME**

The Accountable Mid-Market Technology Department — Data, IT & AI as One Operation

"The integrated stack is the delivery mechanism. The department is the product."

PREVIOUS FRAME
Multi-layer platform offering (Signal + One + AI) presented as a three-component product architecture requiring the buyer to understand the stack.

OPERATIONAL CONSEQUENCE
Anchor commercial identity to the consolidation outcome the buyer experiences — one accountable operation covering data, IT, security, and AI — rather than to the internal product architecture that produces it. The buyer purchases a functioning technology department, not three layers.

WHY IT COULD WIN
Integration breadth across data + IT + AI is Project Compass's strongest relative competitive position within the governed competitor set. The frame maps to documented market preference for vendor consolidation, lower integration burden, and clearer operating accountability. Buyer Value Matrix evidence shows meaningful friction during Purchase and Delivery, where buyers must evaluate, integrate, and de-risk the operating model. The department framing is designed to reduce that complexity by presenting the integrated capability as one accountable operation rather than multiple technology layers.

RISK / CONDITION
> The "technology department" claim is only as strong as the integration reality behind it. The Project Compass + Legacy Delivery Organization operational merger is recent; whether the combined operation delivers as one seamless department is not independently evidenced. If buyer experience reveals seams between inherited MSP operations and the data/AI platform, the reframe converts a strength claim into an exposure.

OPTION 2 — **ACCEPTED ALTERNATIVE**

Accountable Data, IT & AI Operations Partner for the Mid-Market

PREVIOUS FRAME
Service as Software category — a self-declared category position that co-exists with a mainstream market definition centered more heavily on autonomous AI delivery, while Project Compass-specific buyer reaction to that category language remains unproven.

OPERATIONAL CONSEQUENCE
Anchor commercial identity to the accountable operator of the mid-market technology environment that makes data trusted, IT dependable, and AI usable — delivered and governed on the buyer's behalf with clear accountability for implementation and service performance. Verifiable commitments attached to the role are an execution condition, not a current-state claim.

WHY IT COULD WIN
Anchors identity to the intersection of Project Compass's strongest governed relative position (integration breadth) and its sole above-market buyer-evidence finding (implementation risk reduction). Addresses the validated accountability tension directly by making verifiable commitment part of the identity rather than a marketing aside.

RISK / CONDITION
> If verifiable commitments do not accompany the reframe, it amplifies rather than resolves the accountability gap between narrative and publicly visible commitments. Requires the accountability verifiability lever to progress in parallel.

OPTION 3 — **ACCEPTED ALTERNATIVE — GTM MOTION**

Investor-Grade Data & Operations Partner for the Mid-Market

PREVIOUS FRAME
Category-led AI and data platform positioning, in which board readiness and exit-readiness outcomes appear as supporting themes inside a broader technology story.

OPERATIONAL CONSEQUENCE
Anchor the demand motion to a decision moment mid-market operators already recognize — board review, diligence, exit preparation, post-acquisition integration — with the integrated platform as the mechanism rather than the headline.

WHY IT COULD WIN
Project Compass already materially invests in this frame: the Value Acceleration Forum audience, ACGLA presence, CFO-template joint assessment, and M&A-readiness content. Consolidating that distributed motion into a coherent demand frame leverages existing investment. Independent evidence documents PE operating partners and CFOs facing pressure around data readiness, reporting credibility, AI deployment, and diligence preparedness.

RISK / CONDITION
> Concentrates identity on the influence layer (PE operating partners, M&A advisors, fractional CFOs) rather than the economic buyer. Which route actually produces adoption remains unresolved. Treat as a GTM/demand-motion frame; validate against route-attribution evidence before elevating to company identity.

OPTION 4 — **FUTURE-STATE ALTERNATIVE**

The Proof-First AI Partner — Outcomes That Come With Evidence

PREVIOUS FRAME
Outcome-led marketing in which value claims (75–90% savings, zero net-new headcount, 1–8 weeks) lead without publicly available substantiation infrastructure behind them.

OPERATIONAL CONSEQUENCE
Anchor commercial identity to a provability standard — every outcome claim accompanied by its evidence basis, comparator definition, or customer verification. The differentiator becomes the inspectability of the proof, not the magnitude of the claim.

WHY IT COULD WIN
The market's documented trust environment — high AI vendor regret, CFO ROI scrutiny, extended evaluation requirements, and evidence that security assurance can materially influence procurement — favors providers whose proof infrastructure is visible. A proof-first identity is designed to answer that scrutiny rather than deflect it.

RISK / CONDITION
> Highest-risk reframe of the four. Works only if proof density actually arrives; deployed prematurely against a thin independent evidence base, it draws scrutiny to the gap rather than closing it. Also narrows identity toward AI despite the stronger governed Data + IT + AI integration position.

Sequencing condition: *Deployment follows — never precedes — measurable progress on delivery outcome proof density and independent market proof.*

Preference Ranking

Rank	Reframed Role	Status	Strategic Basis
1	**The Accountable Mid-Market Technology Department — Data, IT & AI as One Operation**	PREFERRED — carried into Stage 8 and Stage 8B for testing	Converts the strongest governed relative competitive position — integrated breadth across Data + IT + AI — into a buyer-legible organizational outcome. Reframes how Project Compass sees itself: from technology/services delivered to organizational capability supplied.
2	**Accountable Data, IT & AI Operations Partner for the Mid-Market**	Accepted alternative	Strong, safer reframe. Anchors identity to the validated accountability tension and the sole above-market buyer-evidence finding. Preserves integration breadth.
3	**Investor-Grade Data & Operations Partner for the Mid-Market**	Accepted alternative — GTM/demand-motion frame	Potentially powerful verticalized demand motion leveraging existing channel investment. Premature as company identity until route attribution resolves which channels actually produce adoption.
4	**The Proof-First AI Partner**	Accepted future-state alternative	Potentially powerful once proof infrastructure exists. Cannot credibly precede measurable proof-density improvement; would currently spotlight a weakness rather than close it.

Governance note: The preferred reframe is a strategic preference, not a proven finding. Stage 8 (Reframe the Customer) and Stage 8B (Reframe the Pursuit) will test whether the customer-expansion and pursuit-qualification analysis coheres around Option 1 — or challenges it. Their function is testing, not confirmation.

CXOCentric | Strategic Navigation Assessment | Sample

Reframe the Value

Company: Project Compass | **Framework:** OWF 9.0 | **Date:** 2026-08-13 | **Evidence basis:** Public, independently discoverable sources only

One Integrated Technology Operation

SEE IT

Data, IT, security and AI come together through one technology operation instead of being managed as separate capabilities, vendors and responsibilities.

STRONGEST WHEN

Technology responsibility is fragmented across systems, providers and internal teams.

WEAKENS WHEN

The combined Project Compass operation does not perform as an integrated delivery model.

CREDIBLE BECAUSE

- Project Compass brings Data, IT, Security and AI capabilities together with one operating model.
- Independent evidence supports the combination of the data and IT operations.
- A named customer reports that one team delivered an implementation after three previous vendors failed.

SUPPORT

Faster Operational Visibility

SEE IT

Within weeks, leadership can gain clearer visibility across fragmented operations.

STRONGEST WHEN

Disconnected systems and previous technology efforts have failed to create a usable operating view.

WEAKENS WHEN

Public implementation-time and visibility evidence depends on a single named customer.

CREDIBLE BECAUSE

- A named customer reports a twelve-week implementation after three vendors failed over five years.
- The same customer reports gaining real visibility into operations.

SUPPORT

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STRATEGIC NAVIGATION ASSESSMENT · PROJECT COMPASS

Reframe the Customer

CURRENT CUSTOMER BULLSEYE

US mid-market operating companies, $50M–$500M revenue. Primary economic buyers: CEO, CFO, COO (CIO where present). Fragmented ERP/CRM/spreadsheet estates. This remains the governed ICP; everything below is an adjacent hypothesis held to evidence.

1 · Technology Service Multipliers

HIGHEST-PRIORITY HYPOTHESIS

CUSTOMER

MSPs, MSSPs, and technology service providers that directly buy and use Project Compass in their own customer delivery.

VALUE HYPOTHESIS

One provider relationship can extend integrated Data + IT + Security + AI capability across multiple downstream customers.

EVIDENCE

Market models exist for embedded and multi-client technology delivery. Project Compass-specific commercial and technical feasibility remains unproven.

REMAINING VALIDATION

Confirm architecture, pricing, tenancy, security, support, margin, and partner-delivery economics.

2 · Channel-Enabled Emerging Mid-Market

STRATEGIC HYPOTHESIS

CUSTOMER

Smaller operating companies, including the $10M–$50M segment, reached through MSPs, MSSPs, or comparable service providers.

VALUE HYPOTHESIS

These companies may be poor direct customers but viable channel-served customers when the service provider absorbs delivery complexity.

EVIDENCE

Prior research did not support direct Project Compass consumption in this segment. It did not disprove channel-enabled value access.

REMAINING VALIDATION

Test unit economics, minimum viable deployment, support burden, repeatability, and partner margin.

3 · Autonomous Enterprise Business Units

FUTURE / READINESS-GATED

CUSTOMER

Divisions, subsidiaries, acquired businesses, carve-outs, and regional units inside enterprises above $500M.

VALUE HYPOTHESIS

Mid-market-shaped technology problems may exist inside larger enterprises without requiring an enterprise-wide sale.

EVIDENCE

Value portability is plausible and inherited enterprise relationships support delivery plausibility. Buyer autonomy and commercial readiness remain unverified.

REMAINING VALIDATION

Verify buyer authority, contracting scope, procurement requirements, security requirements, and Project Compass readiness.

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GOVERNED RESULT

1	1	1	0
Highest-priority adjacent hypothesis	Channel-enabled growth hypothesis	Future readiness-gated hypothesis	General upmarket recommendation

The customer opportunity is not simply upmarket or downmarket. It is leverage. Project Compass should prioritize customers and channels that multiply its integrated capability across many operating companies. MSPs and MSSPs may become direct customers; smaller companies may become channel-served customers; enterprise units remain a future expansion path once commercial readiness is proven. PE Operating Partners remain gateways, not customers.

STRATEGIC NAVIGATION ASSESSMENT

Reframe the Pursuit

Project Compass · August 2026 · A qualification framework, not a sales playbook. Each adjacent-customer hypothesis from Reframe the Customer receives one governed pursuit record.

Navigator rule: Pursuit follows evidence, not ambition. A triggered disqualifier changes the recommendation to DO NOT PURSUE. Weak fits are excluded, never rewritten as nurture.

1 Technology Service Multipliers

REFRAME THE CUSTOMER · HYPOTHESIS 1 · HIGHEST-PRIORITY

CONDITIONAL

TARGET

MSPs, MSSPs, and technology service providers that directly buy and use Project Compass in their own customer delivery.

PURSUIT THESIS

One provider relationship multiplies integrated Data + IT + Security + AI capability across many downstream operating companies.

EVIDENCE SUPPORTING PURSUIT

Market models exist for embedded and multi-client technology delivery; the company's legacy managed-services delivery heritage demonstrates the service-provider operating pattern; integration breadth is its strongest relative position. Project Compass-specific commercial and technical feasibility remains unproven.

QUALIFICATION QUESTIONS

Q1 · Does the provider have downstream customer demand for integrated Data + IT + Security + AI capability?

POSITIVE: named downstream opportunities with active fragmentation pain.
NEGATIVE: demand must be created by the provider from scratch.

Q2 · Can the provider support the required architecture, multi-tenancy, and security model?

POSITIVE: existing managed multi-client delivery infrastructure.
NEGATIVE: delivery model is bespoke per client with no shared platform motion.

Q3 · Do the unit economics work for both parties?

POSITIVE: partner margin and support burden allow repeatable delivery at Project Compass price points.
NEGATIVE: provider margin requires customization that breaks productization.

DIFFERENTIATED APPROACH

ENTRY POINT
Owner of the managed-services portfolio, CTO, VP Services, or executive responsible for new service offerings.

CUSTOMER NEED
A differentiated, deliverable integrated capability to sell.

PROOF REQUIRED
One validated partner deployment with referenceable downstream outcomes.

VALUE PATH

Provider needs a differentiated offering → make visible the integrated operation as a sellable capability → prove via pilot deployment with measurable downstream customer outcome → next commitment: joint go-to-market with defined tenancy, pricing, and support model.

DISQUALIFIERS

1. **Provider will not contract as the economic buyer for the platform itself.**
2. **Architecture cannot support secure multi-client delivery.**
3. **Partner economics require customization that destroys repeatability.**

2 Channel-Enabled Emerging Mid-Market

REFRAME THE CUSTOMER · HYPOTHESIS 2 · STRATEGIC

CONDITIONAL

TARGET

Smaller operating companies, including the \$10M–\$50M segment, reached through MSPs, MSSPs, or comparable service providers.

PURSUIT THESIS

These companies may be poor direct customers but viable channel-served customers when the service provider absorbs delivery complexity.

EVIDENCE SUPPORTING PURSUIT

Prior research did not support direct Project Compass consumption in this segment — economics and internal capability fall below the bullseye threshold. It did not disprove channel-enabled value access; the disqualification applied to direct pursuit only.

QUALIFICATION QUESTIONS

Q1 · Does the company have enough fragmentation across IT, data, security, or AI to value an integrated operating model?

POSITIVE: multiple functions are fragmented and operational visibility is weak.
NEGATIVE: need is isolated to a single technology function.

Q2 · Can the qualified multiplier deliver a standard package at this buyer's economics?

POSITIVE: standard configuration, limited Project Compass support, viable price point.
NEGATIVE: delivery requires direct Project Compass resources or significant customization.

Q3 · Can the buyer purchase and receive the solution through the service provider?

POSITIVE: managed-services buying model is already accepted.
NEGATIVE: buyer requires a direct Project Compass relationship or contracting structure.

DIFFERENTIATED APPROACH

ENTRY POINT
Owner or principal of the operating company, introduced by the serving provider.

CUSTOMER NEED
Operational visibility and dependable technology without internal IT/data staff.

PROOF REQUIRED
Partner-delivered deployment with measurable outcome at segment-appropriate cost.

VALUE PATH

Smaller company needs visibility without headcount → make visible a partner-packaged version of the integrated operation → prove via partner-delivered pilot with segment-appropriate economics → next commitment: repeatable partner package with defined minimum deployment.

DISQUALIFIERS

1. **The customer requires a direct delivery model that the serving partner cannot independently provide.**
2. **No partner willing to carry the delivery and support burden.**
3. **Minimum viable deployment cannot be priced within segment tolerance.**

3 Autonomous Enterprise Business Units

REFRAME THE CUSTOMER · HYPOTHESIS 3 · FUTURE / READINESS-GATED

CONDITIONAL

TARGET

Divisions, subsidiaries, acquired businesses, carve-outs, and regional units inside enterprises above \$500M.

PURSUIT THESIS

Mid-market-shaped technology problems may exist inside larger enterprises without requiring an enterprise-wide sale.

EVIDENCE SUPPORTING PURSUIT

Value portability is plausible; inherited legacy delivery relationships with large-enterprise names support delivery plausibility. Buyer autonomy and commercial readiness remain unverified — remaining validation is an audit of those inherited relationships to establish contracting entity, buyer, scope, and value recipient.

QUALIFICATION QUESTIONS

Q1 · Does the unit hold independent buying authority and budget?

POSITIVE: unit contracts and pays for its own technology operation.
NEGATIVE: purchasing is controlled by parent enterprise procurement.

Q2 · Is the unit's technology estate genuinely bounded and mid-market-shaped?

POSITIVE: fragmented systems, lean internal capability, unit-level P&L ownership.
NEGATIVE: estate is integrated into parent enterprise platforms.

Q3 · Can the unit clear parent-level procurement and security requirements at mid-market speed?

POSITIVE: unit-level vendor approval precedent exists.
NEGATIVE: enterprise vendor governance adds cost and cycle time that breaks the model.

DIFFERENTIATED APPROACH

ENTRY POINT
Unit CEO, COO, CFO, or technology leader with independent operating budget and buying authority.

CUSTOMER NEED
An integrated technology operation at unit scale without enterprise-wide commitment.

PROOF REQUIRED
One confirmed engagement where a bounded unit independently bought and received value.

VALUE PATH

Unit needs a mid-market-shaped technology operation inside a large parent → make visible the integrated operation scoped to unit boundaries → prove via verified inherited-engagement evidence or a bounded-unit pilot → next commitment: defined qualification criteria and pursuit motion for bounded units.

DISQUALIFIERS

1. **Buyer authority and contracting reside with the parent enterprise, not the unit.**
2. **Parent procurement and security requirements eliminate mid-market speed and economics.**
3. **Inherited relationships prove to be parent-enterprise contracts, not bounded-unit engagements.**

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