

Application Example:

Pathwise Software Inc.



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Business Considerations

Business Overview Word Count: 85

Pathwise Software Inc. develops employee onboarding and training software that helps small businesses create consistent, engaging experiences for new hires. Many growing companies rely on manual processes, spreadsheets, and disconnected documents, leading to inconsistent training and difficulty retaining organizational knowledge. Our primary customers are North American companies with 20–200 employees that are expanding their teams but do not have dedicated human resource systems. Pathwise combines customizable onboarding workflows, progress tracking, and employee insights to help businesses improve training consistency, employee engagement, and long-term retention.

Technology Description Word Count: 91

Pathwise Software Inc. has developed a cloud-based software platform that helps companies manage employee onboarding, training, and internal knowledge sharing. The platform addresses challenges with inconsistent processes, limited visibility into employee progress, and difficulty transferring knowledge as teams grow. Pathwise combines workflow automation, customizable training modules, centralized content management, and analytics dashboards to support consistent employee development. The platform has been launched with paying customers and continues to be refined based on user feedback. The technology is currently estimated at TRL 8, reflecting a completed system operating in a real-world environment.

Revenue Streams Word Count: 87

- **Monthly Software Subscriptions (Current)** Customers pay a monthly subscription fee to access the Pathwise platform, including onboarding workflows, training modules, and analytics dashboards. Approximate revenue generated to date: \$85,000.
- **Enterprise Licensing (Current)** Customized annual software agreements for larger customers requiring additional users, integrations, or administrative features. Approximate revenue generated to date: \$40,000.
- **Implementation & Training Services (Current)** One-time fees to support customer onboarding, platform setup, and employee training. Approximate revenue generated to date: \$15,000.
- **Partner Integrations (Planned)** Revenue-sharing opportunities with complementary HR software providers and technology partners.

Key Activities and Important Dates Word Count: 51

- **July–September 2026:** Release updated platform features based on customer feedback, including expanded analytics dashboards and workflow customization tools.
- **October 2026:** Participate in startup pitch competitions and investor meetings to explore future funding opportunities.
- **November–December 2026:** Hire additional software developers to accelerate product development and support customer growth.
- **Winter 2027:** Begin integration discussions with HR software providers and potential technology partners.
- **Spring 2027:** Prepare for a seed investment round to support product development, hiring, and expansion into new markets.

Growth Strategy Word Count: 88

- Expand product capabilities by developing new platform features, automation tools, and analytics capabilities based on customer needs.
- Grow into new markets by expanding from Canadian customers into the United States and other international markets.
- Establish strategic partnerships with HR software providers, consultants, and technology platforms to support integrations and customer acquisition.
- Scale internal capabilities by hiring additional software developers, customer success employees, and technical team members.
- Secure investment funding to accelerate product development, expand the team, and support long-term commercialization.

Key Team Members Word Count: 45

- **Alex Rivera, Co-Founder & CEO:** Leads business strategy, fundraising, partnerships, and customer growth.
- **Maya Chen, Co-Founder & CTO:** Oversees software architecture, product development, and technical roadmap.
- **Software Development Team:** Builds and maintains platform features, integrations, and infrastructure.
- **Customer Success Manager:** Supports customer onboarding, feedback, and retention.



IP Inventory

Protection Status	Protection Type / Protection Measure	Proof of Ownership / Related Agreement(s)	Owner	Asset
Unprotected	Trademark	None	Company	Pathwise (company/platform name)
Internally protected	Copyright, Trade Secret	Employment Agreements	Company	Pathwise source code
Unprotected	Copyright	None	Co-Founder	Original MVP software code
Internally protected	Trade Secret	Employment Agreements, Confidentiality Agreements	Company	Workflow automation logic and analytics methods
Protected by copyright (unregistered)	Copyright	Employment Agreements	Company	User interface designs and platform materials
Partially documented	Trade Secret, Contractual Rights	Customer Agreements	Shared / Unknown	Customer usage data and insights
Licensed	License	Software Licenses / API Agreements	Third-party	Third-party software integrations and APIs
Under review	License	Open-source licenses	Third-party	Open-source software components
Internally protected	Trade Secret, Copyright	Confidentiality Agreements	Company	Technical documentation and product roadmap

IP-related Agreements

Status	Revenue Sharing Obligations	Related Asset	Parties Involved	Agreement Type	Agreement Name
Signed	No	Pathwise source code; workflow automation logic; technical documentation	Company, Software Development Team	Employment Agreement	Employee Agreements
Under Review	No	Pathwise platform; customer usage data and insights	Company, Customers	Software License / Customer Agreement	Customer Subscription Agreement
Active	No	Third-party software integrations and APIs	Company, Third-party software providers	Software License	Third-Party Software Agreements
Under Review	Unknown	Open-source software components	Company, Open-source providers	Open-Source License	Open-Source Software Licenses
Signed	Not Applicable	Workflow automation logic; analytics methods; product roadmap	Company, Employees, Strategic Partners	NDA / Confidentiality Agreement	Confidentiality Agreements

Market Considerations

Competitor and Market Landscape

Key Differentiation	HQ Location	Company Name
Workleap provides broader employee experience tools, while Pathwise focuses specifically on customizable onboarding workflows and knowledge transfer for growing teams.	Montréal, Quebec, Canada	Workleap
BambooHR offers a full HR management platform, while Pathwise focuses on improving onboarding consistency, training processes, and employee development.	Lindon, Utah, United States	BambooHR
Trainual focuses on documenting business processes and training materials, while Pathwise combines onboarding workflows with employee progress insights.	Scottsdale, Arizona, United States	Trainual

White Space & Market Opportunity

Existing HR platforms provide broad tools for managing employees, but many are designed for larger organizations with dedicated HR teams and complex implementation needs. Smaller growing businesses often rely on disconnected documents, spreadsheets, and manual processes to onboard and train employees. Pathwise addresses this gap by providing an accessible platform focused on structured onboarding workflows, knowledge sharing, and employee development for small and medium-sized businesses. As the company grows, continued investment in workflow automation and analytics capabilities will help customers improve training consistency and better understand employee progress.

SWOT

Weaknesses	Strengths
• Limited brand recognition in a competitive software market.	• Cloud-based platform addressing a common onboarding and training challenge.
• Small team with limited development capacity.	• Scalable subscription-based business model.
• Reliance on early customer adoption to support growth.	• User-friendly platform designed for small and medium-sized businesses.
• Limited sales and marketing resources.	• Flexible platform that can evolve with customer needs.
Threats	Opportunities
• Established HR and onboarding software providers with larger market share.	• Expand into new industries and international markets.
• New competitors and AI-enabled platforms entering the market.	• Develop new features and software integrations.
• Similar software solutions competing on features and price.	• Build partnerships with HR consultants and software providers. • Growing demand for digital onboarding and workforce training solutions.