

← Investors

INVESTOR FAQ

The questions every serious investor asks, answered without hedging.

THE SEVEN QUESTIONS

1. What is the instrument, and what are its terms?

A SAFE — a Simple Agreement for Future Equity — with a post-money valuation cap of US\$ 2,000,000 and a most-favoured-nation clause. No discount. It converts at the next priced round, or at the cap if that round prices above it. The template is a standard SAFE; we send the executed document for legal review on a signed NDA.

2. Why this amount?

We are raising US\$ 200,000. It is what 18 months of focused go-to-market costs at the shape of team the plan describes — an average of US\$ 11,111 a month across product, go-to-market, AI and infrastructure, compliance, a below-market founder line and a reserve. It is not sized to build the product, because the product is built. The full defence of the amount and of the cap, including why this round departs from the CEMI house convention, is on the ask page.

3. What does my ticket dilute to?

At the US\$ 2,000,000 post-money cap, the minimum ticket of US\$ 20,000 converts at 1.0% and the full round of US\$ 200,000 at 10.0%. These are conversion-equivalents at the cap; actual cap-table dilution materializes at the next priced round, and later rounds dilute

further. The complete table is on the ask page — it is the only cap-table figure this kit publishes.

4. What is available under NDA, and how do I get it?

The diligence list below, in full, within 24 hours of a signed NDA. Write to invest@skails.ai with your check size and a preferred 30-minute call window; we answer the same business day, and from signed NDA to signed SAFE is typically 7 to 14 days.

5. How does this round relate to CEMI.ai?

skails is an initiative inside CEMI.ai. CEMI raises at group level for the shared platform, and each initiative raises at its own level for its own plan. This round is the initiative level: it funds the skails plan, not the group platform. An investor may enter at either level; the ask page states the relationship in the group's own words.

6. What are the exit paths?

Two plausible ones. A strategic acquisition by an HR-suite incumbent, for whom the two-layer framing and the ISCO/ESCO grounding are the hard parts to build. Or an acquisition by a learning-and-certification or labour-data platform, for whom the evaluation corpus and the credential infrastructure are the asset. Neither is promised. HR-suite incumbents do buy AI-native talent tools: Workday acquired HiredScore, Inc., a provider of AI-powered talent orchestration solutions, on 29 March 2024, and its annual report states that "the total acquisition-date fair value of the purchase consideration was \$530 million, which was paid in cash." Source: Workday, Inc., Form 10-K for the fiscal year ended 31 January 2025 (filed 11 March 2025), Business Combinations note, sec.gov/Archives/edgar/data/1327811/000132781125000056/wday-20250131.htm. No multiple is published here, and none can be: HiredScore's revenue was never disclosed, so no multiple can be computed from citable numbers, and an uncited multiple is worth nothing to you. Angel outcomes follow a power law — most return nothing, a few return the fund — and this one should be read that way.

7. What happens if the round does not close?

Nothing breaks. The platform is built, deployed and paid for; the company continues at its current burn, the hiring plan waits, and we come back when there is revenue to price against. The minimum viable close is US\$ 100,000: below that the round does not close

and committed capital is not drawn.

The diligence list

Under signed NDA:

- ✓ cap table
- ✓ code repository access
- ✓ financial model with monthly cohort projections
- ✓ IP assignment confirmation
- ✓ founder agreement
- ✓ customer pilot artifacts
- ✓ technical architecture review document
- ✓ executed SAFE template

Available within 24 hours of NDA signature.

VALUATION

Why not raise more?

Because we already have a built platform. The raise extends focus to GTM and a small first hire wave — that work doesn't need US\$ 1M. Raising more would mean either taking on hires we can't productively absorb in 18 months or pre-spending against a revenue trajectory we haven't validated yet. We'd rather price the next round from real ARR than over-raise now and price the next round defensively.

Is there a priced-equity option for investors who prefer it?

Not in this round. We'll do a priced Series Seed 12–18 months from now once there's ARR to anchor the valuation conversation. SAFE keeps this round simple and cheap from a legal-fees perspective on both sides.

PRODUCT AND COMPETITIVE

What is actually shipped today?

Mechanical Layer: hundreds of evaluation profiles across dozens of sectors and multiple levels · thousands of multilingual competency questions · cognitive / personality / DISC / aptitude tests · CV evaluator + creator + translator · salary aspiration estimator · interview simulator · recruitment 7-step end-to-end (Define · Open · Score · Rank · Simulate · Prep · Decide, audit-logged and ISCO-mapped) · candidate pipeline · job-fit scoring · climate surveys · 360 reviews · ISCO-08/ESCO crosswalk · public job board · certificate issuance.

Transformative Layer: Personal Growth Plan (12/24/36-month) · AI-Readiness Assessment (individual + organizational) · Career Path Navigator (ISCO-grounded) · Org Transformation Plan (CHRO-grade) · Scenario Simulators (Committee Defense, AML Triage, Cash Crisis, Variance Investigation, Skill Simulator) · Smoother Experiences integration with branded Custom Academies / Digital Learning Divisions · Unified Activity dashboard · Communities of Practice.

Operational stack out-of-the-box: HRIS · ATS · payroll & accounting · SSO/identity (Google/Microsoft/Okta) · calendars & messaging (Outlook/Slack/Teams/Google) — open APIs, webhooks, SCIM, SAML. Standards: ILO · ISCO-08 · ESCO · GDPR. Built around your criteria, your priorities, and your values.

What stops Workday / SAP / Greenhouse / Lattice from doing this?

Two things. (1) The two-layer framing requires editorial commitment, not engineering — incumbents have spent a decade selling “your HR suite, but with AI bolted on,” and the Transformative Layer requires the opposite framing (humans first, AI as instrument). They can't pivot the narrative without contradicting their own marketing. (2) Trilingual + ISCO/ESCO native + LATAM-first is a structural commitment they would have to retrofit. We started here. The platform is built around it.

None of that means incumbents won't encroach. It does mean we have a real 24–36 month head start in the markets we've chosen to win first.

What about generic AI startups that just build whatever's hot?

They under-serve HR specifically because HR sales cycles are long, taxonomies are complex, and the buyer is a CHRO not an engineer. Generic AI startups optimize for engineering-led adoption (the ChatGPT/Cursor playbook). HR doesn't buy that way. We do.

Why hasn't this been built before?

It was attempted. Most attempts foundered on one of three rocks: (1) building only the Mechanical Layer and competing as “cheaper Workday”; (2) building only the Transformative Layer and being unable to sell it without a Mechanical Layer foothold; (3) launching English-only and missing the LATAM / francophone / Iberian markets that are the most underserved. We routed around all three.

TEAM AND EXECUTION

Is solo-founder a deal-breaker?

It would be at a Series A. At an angel round of this size, the question is whether the founder can credibly deliver 18 months of focused execution with the raise — and the evidence is the existing platform. The first two hires post-raise are engineers; a GTM lead follows within 6 months. We're not asking investors to fund a team that doesn't exist; we're asking them to fund the expansion of execution that has already been demonstrated.

What advisors / board structure?

No formal board at this stage (SAFE round, single founder). Advisor slots reserved for HR-tech veterans, AI-ethics academics, and LATAM/Iberian channel leaders. Strategic advisor positions (0.25–0.50% equity each, 2-year cliff-free vesting) available for the right people; investors are welcome to propose names.

PROCESS

How do I commit?

Email invest@skaiills.ai with check size and a preferred 30-minute call window. We respond same business day. After the call, we send the diligence pack under NDA. From signed NDA to signed SAFE is typically 7–14 days.

ROUND SIZE

US\$ 200,000

10.0% — conversion-equivalent at the cap

VALUATION CAP

US\$ 2,000,000

SAFE post-money cap — a ceiling on conversion, not a valuation

MINIMUM TICKET

US\$ 20,000

1.0% — at the cap

INSTRUMENT

SAFE (post-money cap)

US\$ 2,000,000 · MFN · no discount

USE OF FUNDS

18 months runwayProduct · go-to-market · AI and infrastructure · compliance
· founder · reserve

REVENUE MODEL

B2B SaaS subscriptions + individual plans

Published pricing at /pricing · pre-revenue today

Carlos Miranda Levy

Coordinator of Impact, Innovation and Intelligence

skails is an initiative of CEMI — Collectively Enhanced Multiple Intelligence.

skails.ai investor kit

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