

— SEED ROUND • 2026

The AI operator for HR and People Ops.

Twenty-six areas of deep HCM domain expertise, agentic execution, and grounding in the systems teams already run — with vetted human specialists one handoff away.

• LIVE AT [HCMGPT.COM](https://hcmgpt.com)

• RAISING \$500K-\$1.5M

THE PROBLEM

Work has changed. The tools haven't.

HR and People Ops teams carry more surface area than ever — contingent labor, multi-state compliance, distributed teams, constant re-skilling. They're doing it on software designed for a workforce that no longer exists.

01

Stacks are fragmented.

HRIS here, ATS there, payroll somewhere else, policy docs in Drive. Nothing reasons across them, so the human becomes the integration layer.

02

Outsourced HR is expensive and slow.

Retainers for advice that arrives days late. Teams pay a premium for access to expertise they need in the moment, not next week.

03

Generic AI doesn't know HCM.

A general chatbot will confidently guess at an FLSA exemption test or a multi-state leave rule. In this vertical, a plausible wrong answer is a liability.

04

Legacy suites can't retrofit.

Bundled platforms bolt chat onto a record system built two decades ago. AI-native isn't a feature you add — it's an architecture you start from.

— WHY NOW

Three shifts are converging at once.

SHIFT 01

Vertical AI has been proven.

The pattern is established: take a professional vertical, train on its actual corpus, and displace both the generalist chatbot and the legacy tool. The question is no longer whether it works.

PROOF POINTS

Harvey · legal · \$3B+
Cursor · code · \$9B+
Hebbia · finance

SHIFT 02

HCM incumbents are structurally exposed.

Workday, SAP, and ADP own the record but not the reasoning. Their architecture, release cadence, and margin structure all resist an AI-native rebuild — so they buy or partner instead.

CONSEQUENCE

Incumbents become
channel, not competition

SHIFT 03

The talent supply chain is fragmenting.

Work is moving to contingent, project, and fractional models faster than HR systems can model it. Teams need on-demand expertise as infrastructure, not as a procurement event.

OUR POSITION

A curated network,
programmatically reachable

THE OPENING

HR and People Ops is the largest professional vertical still without a dedicated vertical-AI player. That window is open now, and it will not stay open.

THE SOLUTION

HCMGPT — AI-native, composable, and human-backed.

One conversational interface across everything an HCM professional actually does — drafting policy, answering compliance questions, sourcing candidates, managing contractors, onboarding hires. Three things make it different.

DIFFERENTIATOR 01

AI + Human, not either/or.

When confidence drops or the stakes rise, the conversation routes to a vetted specialist from the Esteemed Colleagues network — inside the same thread. Nobody else in this vertical has the network to route to.

~~A chatbot that guesses~~

A system that knows when to escalate

DIFFERENTIATOR 02

Composable, not bundled.

Adopt HCMGPT alone or compose it with our ATS, CRM, and app builder. It reads the systems a team already runs instead of demanding they replace them. No rip-and-replace, no migration quarter.

~~A twelve module suite~~

The pieces you actually need

DIFFERENTIATOR 03

AI-native from the substrate up.

Persistent memory, cross-system reasoning, and twenty-six domain-specialized models — built on our own Esteemed Intelligence substrate, not a wrapper on somebody else's API.

~~Chat bolted onto a database~~

Memory and reasoning as the core

WHAT'S SHIPPING

What's live, what's next.

LIVE

HCMGPT

The AI front door for HR and People Ops. Chat, Assist, and Connect across twenty-six HCM domain areas.

hcmgpt.com

LIVE · 35,000 MEMBERS

Colleagues

The curated talent network HCMGPT escalates into when a question needs a vetted human — and a marketplace in its own right.

colleagues.eesteemed.io

LIVE · IN PRODUCTION

Esteemed Intelligence API

The AI substrate under everything: persistent memory, cross-system reasoning, domain-model distillation, reproducible inference.

API · multi-tenant

LIVE

Acquire CRM

Outreach and pipeline. The guarded send path for everything the AI drafts — no message leaves without passing the guards.

acquire.eesteemed.io

BETA TESTING

Hire ATS

Applicant tracking, AI-native from the start. The transactional write path for candidates, jobs, and submissions.

In beta with design partners

LIVE · API

TAL API

The Talent Access Layer — makes the Colleagues network embeddable in any product, ours or a partner's.

Programmable · usage-priced

WHY IT MATTERS

Each piece stands alone and compounds together. HCMGPT is the wedge; the TAL API is why an ATS or HCM vendor becomes a **distribution channel rather than a competitor**.

— TRACTION & VALIDATION

Shipped, not slideware.

Live

HCMGPT in production

HCMGPT.COM · MVP SHIPPED

35K+

Colleagues network

VETTED PROFESSIONALS

26

HCM domain areas

SPECIALIZED, IN PRODUCTION

4

Platforms in production

REVENUE-GENERATING TODAY

COLLEAGUES CUSTOMERS · IN PRODUCTION

IEEE

U of Oklahoma

IRG

Alvernia

BCG / BCT

HCMGPT launches into an existing enterprise relationship base — not a cold start.

PLATFORMS IN PRODUCTION

Colleagues

Acquire

Esteemed Intelligence API

Esteemed Create

TRY HCMGPT YOURSELF

hcmgpt.com

BUSINESS MODEL

Three revenue streams, one customer relationship.

STREAM 01 • SAAS

HCMGPT subscriptions

\$39–\$299

per user / month

Starter through Teams, gated by mode access. Product-led, self-serve, and the top of the funnel for everything else. Add-on subscriptions layer on top.

STREAM 02 • USAGE

HCMGPT & Esteemed Intelligence API

Usage

metered • tokens & API calls

Token packs on top of every plan, plus metered access to the Esteemed Intelligence API for teams and partners building on the substrate directly.

STREAM 03 • MARKETPLACE

Talent Access Layer

15%

marketplace fee • Stripe Connect

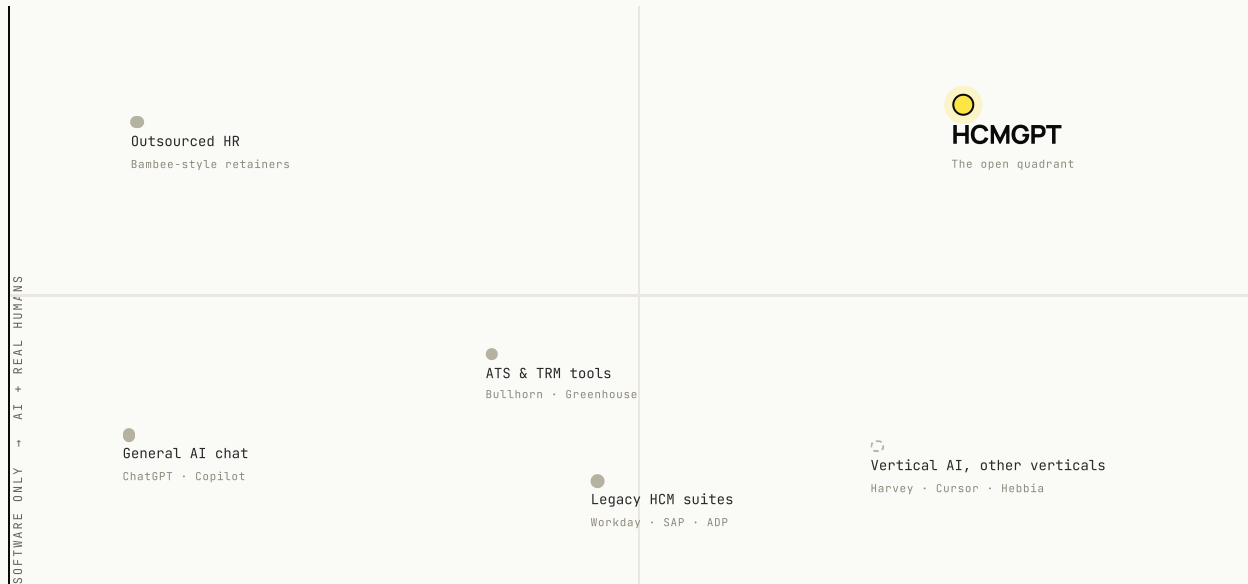
Every escalation to a vetted human is a transaction. Pay-on-pay, already operating, and it scales with AI usage rather than against it.

THE EXPANSION PATH

Self-serve seat → Team workspace → Token packs & add-ons → Systems connected → Marketplace spend

COMPETITIVE POSITIONING

An empty quadrant in the largest untaken vertical.



DIRECT REPLACEMENT TARGET

Outsourced HR services

Retainer-based advisory. We deliver the same expertise instantly at software margin, and keep the human option for when it's genuinely needed.

NOT COMPETITORS - CUSTOMERS

Legacy HCM & ATS

Workday, SAP, ADP, Bullhorn, Greenhouse. They own records; we reason across them. The Talent Access Layer makes them channel partners.

REFERENCE MODELS, NOT RIVALS

Harvey • Cursor • Hebbia

They validated the vertical-AI thesis in legal, code, and finance. HCM is the largest remaining vertical, and it is uncontested.

STRUCTURALLY CAN'T FOLLOW

General AI assistants

No domain specialization, no system grounding, no vetted human network, no liability posture. Breadth is their business model.

— GO-TO-MARKET

Four channels, all feeding one platform.

CHANNEL 01

Product-led growth

HCMGPT is the top of the funnel. Self-serve signup, SEO against high-intent HCM queries, and a free tier that demonstrates domain depth immediately.

hcmgpt.com • self-serve
SEO • long-tail HCM
Free → Starter → Pro

CHANNEL 02

HR influencer bench

Hundreds of high-profile HR pros in our Colleagues talent community — alumni of major commercial, government, and non-profit employers — who we can enlist as advocates, reviewers, and co-marketers.

Practitioner advocacy
Case studies & reviews
Referral into their networks

CHANNEL 03

Industry associations

The bodies HR and staffing buyers already belong to. Conference presence, content partnerships, and member channels — earned credibility where budget decisions get discussed.

SHRM
SIA
Regional HR chapters

CHANNEL 04

Enterprise & HCM builders

Direct enterprise motion through decades of staffing-industry relationships, plus a niche builder channel — teams building internal HCM apps and workflows on our engines and API, reachable through the same HR channels.

Staffing industry network
HCM app builders
Talent Access Layer API

WHY IT COMPOUNDS

Each channel makes the others cheaper. Self-serve users surface the use cases; influencer advocacy and association credibility lower enterprise CAC; enterprise contracts fund the domain models that make the free tier **uncomfortably good for competitors**.

— THE AI-NATIVE OPERATING THESIS

We intend to stay small on purpose.

The same argument we make to customers applies to us. An AI-native company should not need a headcount curve that looks like a 2015 SaaS company's. **Our target is fewer than 15 FTE at \$5M ARR.**

- We run our operations on our own products — recruiting, onboarding, support, and content all sit on HCMGPT and Create.
- Growth motions are automated by agents, not staffed by teams. Marketing, lifecycle, and top-of-funnel qualification run themselves.
- When we need depth we don't have, we engage a Colleagues specialist instead of opening a req.
- Capital goes into the substrate and the domain models — the assets that compound — rather than into linear headcount.

HEADCOUNT AT \$5M ARR

Traditional SaaS

INDUSTRY BENCHMARK

50–70

AI-assisted SaaS

CURRENT BEST PRACTICE

25–35

HCMGPT target

AI-NATIVE FROM DAY ONE

< 15

The efficiency isn't a cost-cutting story — it's the product thesis applied to ourselves. If it doesn't work here, it won't work for customers.

TEAM

Small, technical, and honest about the gap.



INTERIM CEO · CTO · PRODUCT

Chris McGrath

Builds and ships the platform. Owns architecture across Esteemed Intelligence, Connect, and the Talent Access Layer, plus product direction for HCMGPT. Deep background in open-source and developer ecosystems — the reason our community channels are earned rather than bought.



FRACTIONAL CSO

Tom Schmidt

Runs strategy and the enterprise motion. Decades of staffing-industry relationships that give us direct access to the buyers most exposed to the problem HCMGPT solves — and the network that seeded Colleagues.

OPEN · PRIORITY HIRE

Actively recruiting an operating CEO with 0-to-Series-A experience.

We know what we're good at and what we're not. This raise funds that hire first — it's the highest-leverage line in the use of funds.

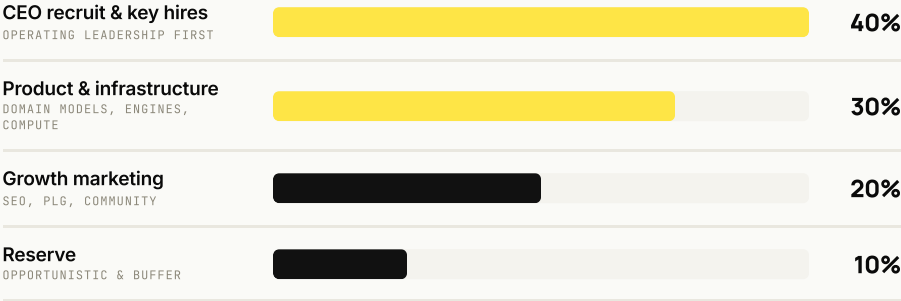
THE ASK

\$500K–\$1.5M

SEED ROUND · OPEN NOW

RUNWAY	12–18 months to Series A metrics
STRUCTURE	Priced round or SAFE — flexible
PROGRAMS	Applied — YC Fall 2026, NVIDIA Inception
STATUS	Product live, revenue starting

USE OF FUNDS



The round is sized to reach Series A metrics without a second bridge: an operating CEO in seat, the domain-model moat deepened, and product-led revenue compounding.

— VISION

We're building the platform for **how work will actually happen.**

AI does the work it's better at. Vetted humans do the work they're better at. The infrastructure that routes between them — with memory, grounding, and accountability — is the durable business. We start with HCM because it's the largest vertical nobody has taken, and because we already have the network.

HR & People Ops

Staffing & recruiting

Finance ops

Legal ops

Every professional vertical

Let's talk →

hcmgpt.com · c.mcgrath@esteemed.io