

VELAR PLATFORM

DEVELOPMENT ROADMAP

Post-acquisition product evolution plan
August 2026

Roadmap principle

The roadmap starts from the current desktop product and modular AI architecture. It does not assume that production database, cloud SaaS, proprietary LLM training or autonomous AI already exist. Each phase converts an architectural foundation into a more production-ready commercial capability.

01 Roadmap at a Glance

PHASE	FOCUS	PRIMARY OUTCOME
1	Stabilization	Reliable baseline, test coverage, release discipline and technical hardening.
2	Production Database	Durable production persistence, migrations, backups and data governance.
3	AI Model Integration	Model gateway and controlled integration of selected AI providers/models.
4	Advanced AI Intelligence	Evaluation, richer reasoning, context, memory and recommendation quality.
5	Automation & Autonomous Workflows	More capable workflow execution, orchestration and controlled autonomy.
6	Cloud / SaaS	Hosted architecture, tenancy, identity, APIs and cloud operations.
7	Commercial Scale	Enterprise readiness, billing, observability, sales enablement and scale.

02 Phase 1 — Stabilization

Goal

Turn the existing application into a dependable baseline for continued engineering and independent technical verification.

WORKSTREAM	KEY TASKS	RESULT
Code quality	Review modules, remove dead paths, clarify interfaces and document critical services.	Cleaner maintainable codebase.
Testing	Add unit/integration coverage for core business logic, AI Core boundaries and workflows.	Regression safety.
Electron hardening	Review preload exposure, IPC validation, lifecycle and error handling.	Safer desktop runtime.
Build	Document clean build environment and reproducible packaging.	Repeatable release process.
Dependencies	Pin and review versions, licenses and vulnerabilities.	Controlled dependency baseline.
Documentation	Setup, architecture, build and operational notes.	Transfer-ready technical package.
Release discipline	Versioning, changelog and release checklist.	Predictable releases.

Exit criteria: a clean environment can build/package the application; core workflows are testable; major technical boundaries are documented.

03 Phase 2 — Production Database

Goal

Replace or strengthen application-level persistence with a production-grade data foundation suitable for multi-user and cloud operation.

WORKSTREAM	KEY TASKS	RESULT
Schema	Define normalized production schemas for clients, contacts, deals, tasks, activity and AI-related records.	Stable data model.
Migrations	Introduce versioned schema migrations.	Controlled evolution.
Transactions	Define consistency and transaction boundaries.	Reliable writes.
Backups	Automated backups and restore testing.	Recoverability.
Indexing	Optimize frequent CRM, analytics, memory and workflow queries.	Performance baseline.
Data governance	Retention, deletion, export and audit requirements.	Operational data policy.
Repository layer	Separate domain logic from persistence implementation.	Migration-ready architecture.

Exit criteria: business data has an explicit production persistence strategy with tested migration and recovery procedures.

04 Phase 3 — AI Model Integration

Goal

Connect the modular AI Core to selected external or self-hosted models through a controlled model integration layer.

WORKSTREAM	KEY TASKS	RESULT
Model gateway	Create provider/model abstraction and standardized request/response contracts.	Replaceable model layer.
Context integration	Map ContextEngine outputs into model-ready context.	Context-aware AI.
Prompt / policy layer	Centralize prompts, system rules, output constraints and versioning.	Controlled AI behavior.
Memory integration	Retrieve relevant memory and store useful outcomes.	Contextual continuity.
Recommendation integration	Connect model outputs to RecommendationEngine.	AI-assisted recommendations.
Evaluation	Define quality datasets, human review and	Measurable AI quality.

Cost controls Usage limits, caching and model routing. Predictable economics.

Boundary: this phase means integrating models into VELAR; it does not require training a proprietary LLM.

05 Phase 4 — Advanced AI Intelligence

Goal

Increase the quality, consistency and usefulness of AI-supported decisions without presenting the system as unrestricted autonomous intelligence.

CAPABILITY	DEVELOPMENT	RESULT
Advanced context	Context ranking, relevance filtering and structured context windows.	Higher-quality inputs.
Memory intelligence	Importance, recency, deduplication and retrieval ranking.	More useful memory.
Decision evaluation	Outcome scoring and decision quality metrics.	Measurable decision performance.
Reasoning workflows	Structured multi-step reasoning patterns and verification.	More consistent outputs.
Recommendations	Confidence, rationale and prioritization.	Actionable recommendations.
Knowledge	Entity linking, graph expansion and retrieval.	Richer domain knowledge.
Human feedback	Feedback capture and review loops.	Continuous product improvement.

Learning definition: feedback-oriented learning and decision outcome tracking. Any future model fine-tuning or training is a separate engineering initiative.

06 Phase 5 — Automation & Autonomous Workflows

Goal

Evolve workflow and automation components from application-level orchestration toward controlled, observable and policy-bound automation.

WORKSTREAM	KEY TASKS	RESULT
Workflow durability	Persistent state, retries, checkpoints and recovery.	Reliable long-running workflows.
Scheduler	Production scheduling service and queue integration.	Timed execution at scale.
Action safety	Permissions, approval gates, idempotency and rollback patterns.	Controlled side effects.

AI decisions	Allow recommendations to trigger predefined workflow paths.	AI-assisted automation.
Human-in-the-loop	Approval steps for sensitive operations.	Safe autonomy boundaries.
Observability	Execution logs, metrics, traces and alerts.	Operational visibility.
Templates	Reusable workflow definitions.	Faster deployment.

Autonomy boundary: autonomous behavior should be introduced incrementally, with explicit permissions, safeguards and observability.

07 Phase 6 — Cloud / SaaS

Goal

Transform the desktop-oriented technology foundation into a commercially scalable hosted platform while preserving Electron as an optional client.

WORKSTREAM	KEY TASKS	RESULT
Backend APIs	Extract domain services behind versioned APIs.	Service-oriented platform.
Multi-tenancy	Tenant isolation and tenant-aware data access.	SaaS foundation.
Identity	Authentication, RBAC and session management.	Secure user access.
Cloud database	Managed production database with backups and scaling.	Durable hosted data.
AI services	Centralized AI gateway and worker architecture.	Scalable AI execution.
Queues/workers	Asynchronous jobs and workflow workers.	Distributed execution.
Observability	Centralized logs, metrics, tracing and alerting.	Production operations.
Deployment	CI/CD, environments, secrets and rollback.	Repeatable cloud delivery.

Exit criteria: a defined tenant-safe hosted architecture can serve multiple organizations with operational monitoring and recovery.

08 Phase 7 — Commercial Scale

Goal

Convert technical readiness into a repeatable commercial platform suitable for broader acquisition, enterprise sales or strategic deployment.

WORKSTREAM	KEY TASKS	RESULT
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Packaging	SaaS plans, desktop distribution and enterprise deployment options.	Clear commercial packages.
Billing	Subscription, usage and invoicing integration.	Revenue infrastructure.
Enterprise security	SSO, RBAC expansion, audit logs, policies and security reviews.	Enterprise readiness.
Customer success	Onboarding, support, documentation and health metrics.	Scalable customer operations.
Analytics	Product usage, retention and business KPIs.	Commercial intelligence.
Partner ecosystem	Integrations, API program and workflow templates.	Distribution leverage.
Go-to-market	Positioning, demos, sales assets and case studies.	Repeatable acquisition motion.

09 Cross-Phase Architecture Evolution

CURRENT FOUNDATION	TARGET EVOLUTION
Electron desktop application	Desktop + hosted services + optional web client.
Application-level data structures	Production database + migrations + backup/recovery.
Modular AI Core	Model gateway + evaluation + production AI services.
Memory abstractions	Scalable memory storage and retrieval.
Decision / reasoning modules	Evaluated decision support and AI-assisted workflows.
Automation / workflow modules	Durable distributed workflow execution.
Local application state	Tenant-aware cloud data and identity.
Build + Windows packaging	CI/CD, signed releases and multi-environment deployment.

10 Priority Logic

The recommended sequence deliberately places reliability and data foundations before deeper autonomy and commercial scale. This reduces the risk of building advanced AI behavior on unstable persistence, security or deployment foundations.

PRIORITY	WHY IT MATTERS
1. Stabilization	Makes the existing asset reproducible and easier to evaluate.
2. Database	Creates durable business-data infrastructure.
3. AI integration	Connects architecture to measurable model capabilities.
4. AI intelligence	Improves quality using real context, memory and outcomes.
5. Automation	Converts intelligence into controlled operational value.
6. Cloud / SaaS	Enables multi-tenant scale and recurring deployment.

11 Buyer / Acquirer Opportunity

A buyer does not need to execute every phase. The roadmap can be adapted depending on acquisition strategy: keep VELAR as an internal desktop platform, integrate its AI Core into an existing product, commercialize the CRM/ERP as SaaS, or use the architecture as a foundation for vertical-specific AI workflows.

Strategic flexibility

The modular architecture allows different investment paths. The highest-value extension points are production data infrastructure, model integration, AI evaluation, workflow reliability, cloud deployment and enterprise security.

12 Roadmap Conclusion

VELAR Platform has a clear path from a working desktop CRM/ERP foundation with modular AI architecture toward a production-grade AI software platform. The roadmap is intentionally staged: stabilize first, establish durable data, integrate models, improve intelligence, expand controlled automation, then introduce cloud and commercial scale.

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