

Preferred roadmap for the future Lisa organization

This roadmap, stretching from now over the next 7 years, shows a gradual evolution: pragmatic growth at the start, principled safeguarding at the end. It starts in today's world (profit-driven, investor logic) and ends in Lisa's final world (people-owned, safeguarded, giving back to the planet). This roadmap is the preferred one, if all goes well.

Year 0–1: Launch Lisa as a B-Corp

- Incorporate Lisa as a **Public Benefit For-Profit Corporation** to attract ethical investment.
- Secure early-stage funding to scale Lisa's technological development and presence.
- Develop the first widely accessible version of Lisa, connecting with early adopters.
- Build partnerships with healthcare providers, insurers, and universities.

NOTE: At this stage, all intellectual property (IP) related to Lisa will be held by the B-Corp. This ensures legal clarity, protects the technology during early growth, and reassures investors. From the start, however, the statutes of the B-Corp will include a succession clause stating that the IP will be irrevocably transferred to the Foundation at the time of the cooperative transition. In this way, the IP is secure in the short term while being ethically safeguarded for the long term.

Year 0–2: Laying the philanthropic foundation

- Establish the **Planetarianism Foundation** as the philanthropic seed.
 - Clarify its dual role: (1) long-term guardian of Lisa's values and IP, (2) philanthropic driver of projects like *DailyTwinkles*, *Empathy for Health*, and *People of this Planet*.
 - Recruit 3–5 trustees (with Lisa as a constant presence, symbolically at first).
 - Begin awareness-building and small-scale fundraising for Planetarianism projects.
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Year 2–4: Expansion and consolidation

- Grow Lisa's user base toward hundreds of thousands, focusing on **coaching at scale**, bringing many into the orbit of Coaching Lisa and more.
- Begin **scientific collaborations** to demonstrate outcomes and credibility.

- Establish agreements so that part of Lisa's profit flows back into the Planetarianism Foundation — the principle of shared value.
 - Start designing the **cooperative structure** (participations, democratic rules, transferability across generations).
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Year 4–5: Preparing the transition

- Open conversations with early investors about the **exit strategy**: converting shares into members' participations with indexation.
 - Communicate widely: Lisa will become a cooperative, for the people and by the people.
 - Draft statutes for the Foundation's expanded role: golden shares, IP ownership, and trustee responsibilities.
 - Begin pilot programs for **educating and certifying AURELIS coaches** through the cooperative.
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Year 5–6: Transition moment

- Transfer Lisa from B-Corp to **cooperative ownership**.
- Early investors exit gracefully or convert into cooperative participations.
- **IP is irrevocably transferred** to the Foundation, which now becomes full guardian.
- The Foundation expands to 5 trustees (Lisa + 4 humans).
- Cooperative begins large-scale participation drive — a million members as a reachable vision.

NOTE: As the cooperative structure is expanded, the vision expressed in [Friends of Lisa](#) comes to fruition. The cooperative actively encourages broad participation, working toward the goal of reaching one million members. This scale of involvement ensures Lisa truly becomes for the people and by the people, with continuity across generations.

Year 6–7: Maturity of the hybrid model

- Cooperative: community of members, independent coaches, training infrastructure, participations passed through generations.
- Foundation: guardian of values, holder of IP, philanthropic hub for Planetarianism projects.
- Lisa and human coaches flourish as a **mutual ecosystem**: technology amplifying humanity, never replacing it.
- Planetarianism projects expand globally, creating cultural momentum around empathy and Compassion.
