Mock PRD + Stories: Reporting Agent Widget

The reporting agent is going to be our MVP platform for Solar Asset Managers. Our ‘widget’ version is the most bare bones version of the Reporting Agent our customers have told us we can produce for them to start using it.

This mock PRD doesn’t contain everything a full PRD would for this tool, but it does provide an honest sampling of how we would write a PRD and some user stories at an early stage of product development, aligning strategically as a team. It should give you a) needed context to complete the take-home assignment and b) give an honest view of the kind of business level information you would receive and that we would all collaborate on.

When we meet to collaborate, we’ll ask your opinion of the sample PRD. What do you recommend changes about how the PRD is written, if anything? What works for you and doesn’t?

Solution

Who for:

- **Users:** Asset Managers and their Execs
- **Buyers:** Head of Asset Management
- **Customers:** Utility-scale or C&I solar asset managers. *Note: in the MVP phase we'll focus on solar because we have the most contacts/knowledge here.*

Purpose:

To provide operational site insights, updates, and reminders to help these users understand their site, its activities, and the 'why' behind them so that they can focus on site performance not on gathering and consolidating the information.

Problems worth solving:

- We estimate up to 50% of site operational context isn't used to make key decisions, like whether to pursue a warranty claim, or understand site performance, like why there is a persistent issue with a certain group of modules that leads to regular failures.
- Why? Site context, particularly unstructured context, is stuck in tribal knowledge (people's heads), in emails, or buried in datarooms. And/or it's not kept up to date. And/or it's in 5 different places and needs to be manually compiled. And/or it's not accurate because someone needed to manually type notes as updates and didn't.
- For context, asset managers typically have 2-5 years of experience, multiple sites to manage, and spend their days either a) compiling their regular performance reports for all their sites to their higher ups, who further consolidate this reporting for their higher ups, or they spend their time setting up service provider contracts for site operations or dealing with root cause analysis or actions to be taken to resolve site performance issues.
- They should be maximizing time spent thinking about site performance - getting the highest power and therefore financial return out of their site - but instead spend up to 50% of their day digging through files, compiling data, and manually inputting information.

Widget Reporting Agent description: early adopter customers are very interested in being able to **query and visualize:**

- Daily site reporting documents from their site maintenance teams (their O&Ms)
- Site electrical hierarchy (a queryable version of the electrical diagrams as a precursor to the full as-built/map query).

When combined, these types of unstructured information can answer basic questions about site operations, like 'what maintenance work was completed on inverter 001 in the past month?', or 'what are my follow up actions with the maintenance crew on site X for the next week'?

Our objectives:

- Enable our users to combine unstructured data sources so that they have a single place to query site operational data, reducing time spent on manual data wrangling.
- Gain validation with early trial customers that our tool is a) useable and b) useful, and that they are excited about the full MVP
- Gain a couple of paying customers (at least covering costs) and access to test users
- **End result for customers:** Reduce the time spent on manual information management for a) day-to-day reporting and b) issue investigation/resolution
- **Measurements:** With early trial customers,
    - Choose some common tasks/queries (e.g. compiling weekly site performance reports), baseline time taken in the current state, compare against time taken using our widget.
    - Keep in touch about site operations issues that need analysis and gather intel on how this sped up resolution of the issue (will need to qualitatively track examples and 'wow' moments)

Requirements

When we meet for collaboration, we'll discuss what you think could be added here from technical and non technical perspectives, given this will be for B2B enterprise customers in the energy industry, in the USA and Europe. What is mission-critical to get the tool in front of test users from friendly trial clients? What needs to be added to ensure the tool is ready for broader usage?

- Accessibility requirements met: WCAG 2.2 Level AA
- Security and personal data management requirements met: GDPR, SOC2, ISO 27001
- Data stored in Europe or the USA
- Clients own their own data and can access/save it when desired. *TBD: whether we store the data or customers do.*
- Meets trial customers enterprise IT data, security, and other requirements - *unsure what these might be at present, need to ask them.*
- Performance - page loading, agentic querying - matches user expectations (need to agree on speeds)
- LLM generation happens in a way that preserves client privacy
- Uptime meets typical B2B enterprise SaaS requirements *(need to look this up)*
- Browser requirements: Chrome, Safari, Edge
- Look-and-feel matches our style guide (colours, fonts)
- Language requirements: English for now, but with the ability to accommodate the following languages later on:
    - English (US)
    - English (UK)
    - Spanish
    - French

- German
- Dutch

Sample features

Note, we'd usually work from wireframes and more detailed user flows for developing these features. For this evaluation, we're looking at how you can work with us to help us fill out new concepts and propose updates/modifications and UI elements, as though we were reviewing a PRD at the early stages of product development.

Ingest emails, PDFs, and meeting transcripts and relate content to specific parts of a site
Data Input

1. Upload documents or forward e-mails relating to activities which are happening on site
2. Extract key actions which have happened on the site, and relate them to specific components which exist on the project (we will provide a json file of site components)
3. Generate a queryable repository of site information, to allow generation of summaries of activities

User query

1. As an asset manager, I can query the site memory and receive opinionated answers that draw on all data sources
   a. Acceptance criteria:
      i. The user can input text and receive a formatted response
      ii. Queries take into account the specific words and concepts which are being asked about, as well as related concepts
      iii. Answers only utilize real/existing information - no hallucinations, no attempting to answer questions without an answer
      iv. All answers point to source material (e.g. the email, the contract)
      v. Guards against user inappropriate behaviour: the agent does not act sycophantic or respond to flirting

Events timeline visualization

1. As an asset manager, I can see site events (past and future) on a timeline view so I can contextualize the order in which site actions have happened, and know when upcoming events are due
   a. Acceptance criteria:
      i. Events are actions and milestones (e.g. a fix, a contract started or will start)
      ii. Events pull from all uploaded data sources
      iii. When an event is clicked on, the source of that event and a summary of the event appears

iv. Clear visual distinction between past and future events