Requirements Gathering and Initial Design

Requirement Gathering

Description: Conduct interviews with small business stakeholders to understand their needs and pain points regarding succession planning.

Customer Pain Points:

- Language Barrier: Difficulty in understanding AI responses due to complex language.
- Technical Jargon: Overuse of technical terms that are not easily understood by users.
- Lack of Knowledge: Insufficient domain knowledge affecting the quality of advice.
- Lack of Planning: Inability to provide structured and actionable plans.
- Lack of Action: Difficulty in executing suggested actions or follow-ups.

BizBridge Needs:

- Human-Like Interaction: AIgents should interact in a natural and human-like manner.
- Natural User Engagement: Engaging users effectively to maintain interest and provide value.
- Expertise Delivery: Ensuring AIgents deliver expert advice accurately and efficiently.

Data Gathering on Skills, Roles, and Readiness Criteria for Potential Successors:

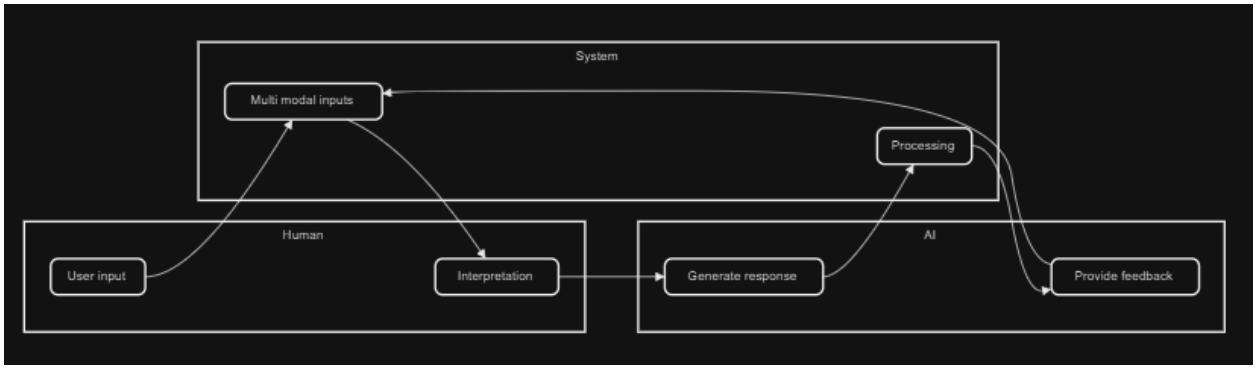
- Roles:
    - Inside the Business:
        - Hierarchy of Operations
    - Outside the Business:
        - Investors
        - Banks
        - Friends/Family
- Criteria:
    - Adaptability
    - Leadership
    - Relatability
    - Trust

Prompt Engineering:

- Upgrade Existing Prompts: Enhance current prompts to be more natural and user-friendly.
- Build New Prompts: Develop new prompts tailored to the succession planning flow and user needs.

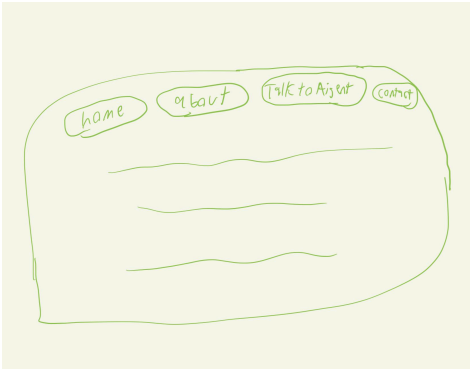
Initial Design and Prototyping

Description: Develop initial wireframes and prototypes for the succession planning tool. Focus on ease of use and accessibility in the UI design.



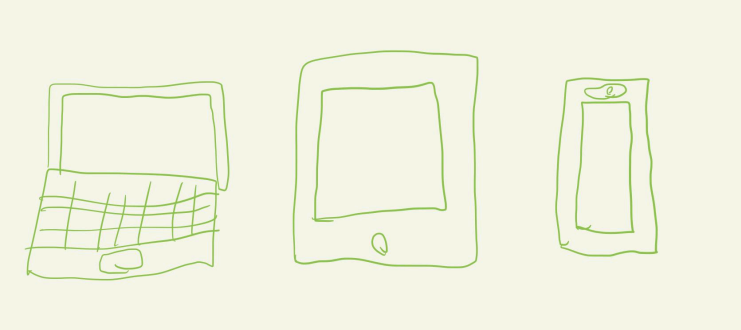
Ease and Accessibility Practices:

1. Intuitive Navigation
    - Clear Hierarchy: Organize content logically with a clear visual hierarchy to guide users through the interface seamlessly.
    - Consistent Layout: Maintain consistent layouts and navigation elements across the platform to reduce the learning curve for users.
    - Breadcrumbs: Use breadcrumb navigation to help users understand their location within the platform and easily navigate back to previous sections.

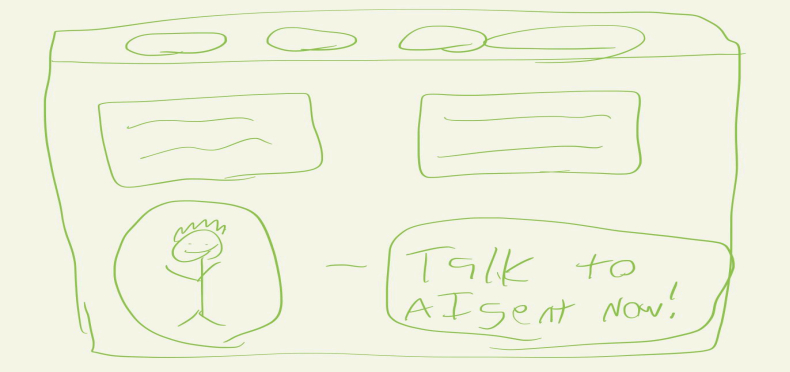


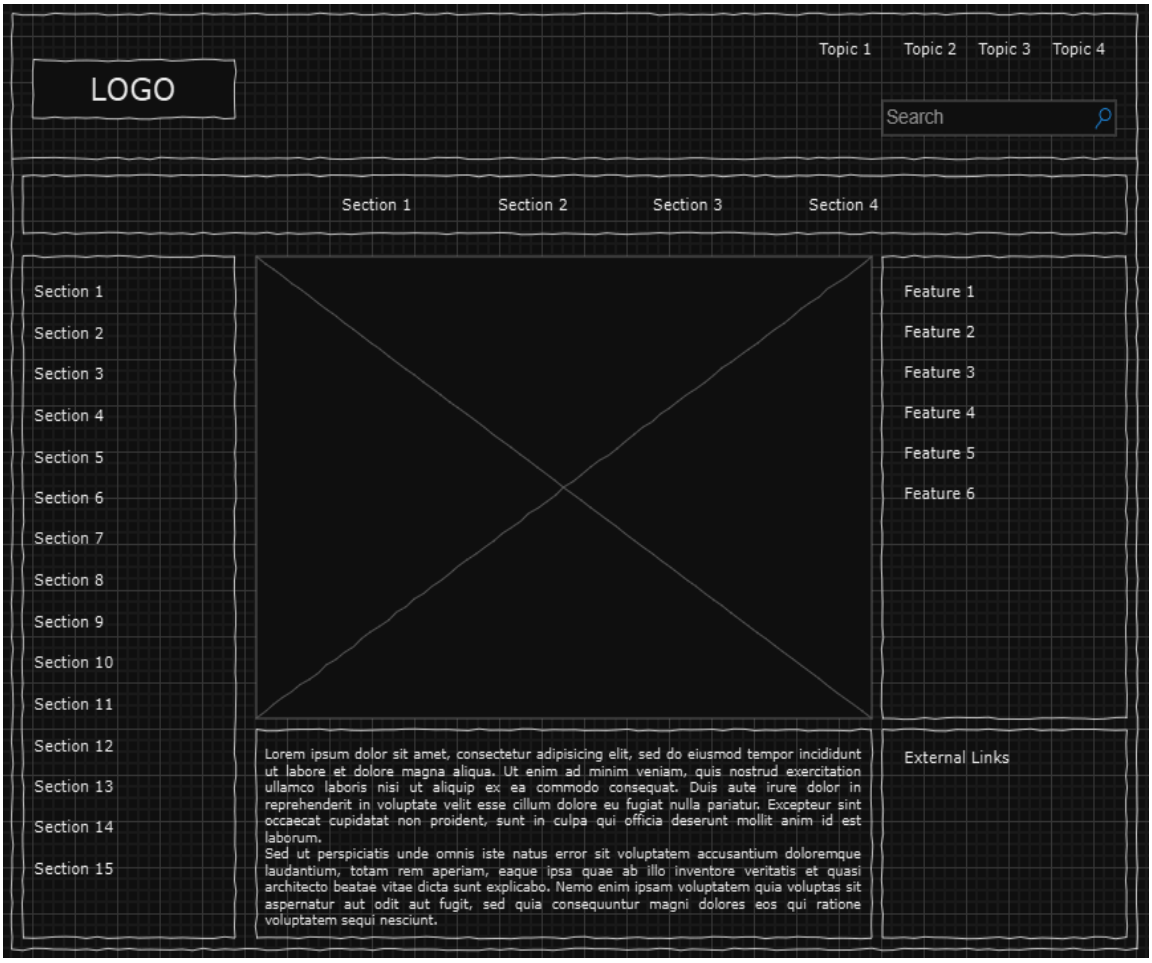
2. Responsive Design
    - Device Adaptability: Ensure the UI adapts smoothly to different screen sizes and devices, from desktops to mobile phones.

- Touch-Friendly Elements: Design touch-friendly elements, such as larger buttons and interactive areas, for ease of use on mobile devices.



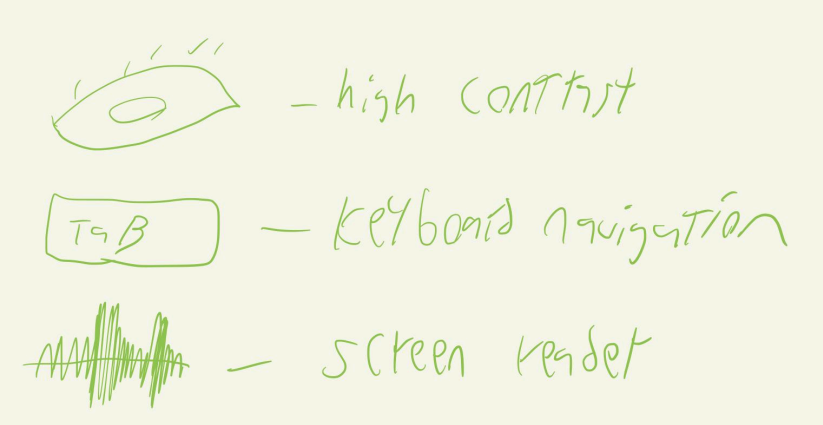
3. Simplified User Interface
    - Minimalist Design: Keep the design clean and uncluttered, focusing on essential elements to avoid overwhelming users.
    - Whitespace Utilization: Use whitespace effectively to separate content and make the interface more readable and visually appealing.
    - Direct Pathways: Provide direct pathways to key actions, minimizing the number of steps required to complete tasks.





4. Accessibility Considerations
    - Color Contrast: Ensure high color contrast between text and background to make content easily readable for users with visual impairments.
    - Keyboard Navigation: Design the interface to be fully navigable using a keyboard, catering to users with motor impairments.
    - Screen Reader Compatibility: Ensure the UI is compatible with screen readers by using appropriate semantic HTML elements and ARIA (Accessible Rich Internet

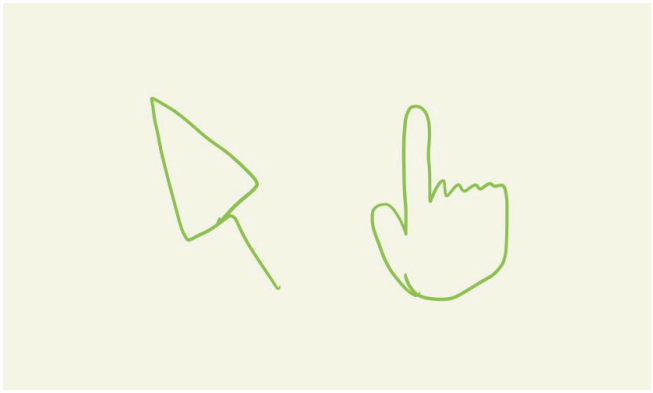
Applications) labels.

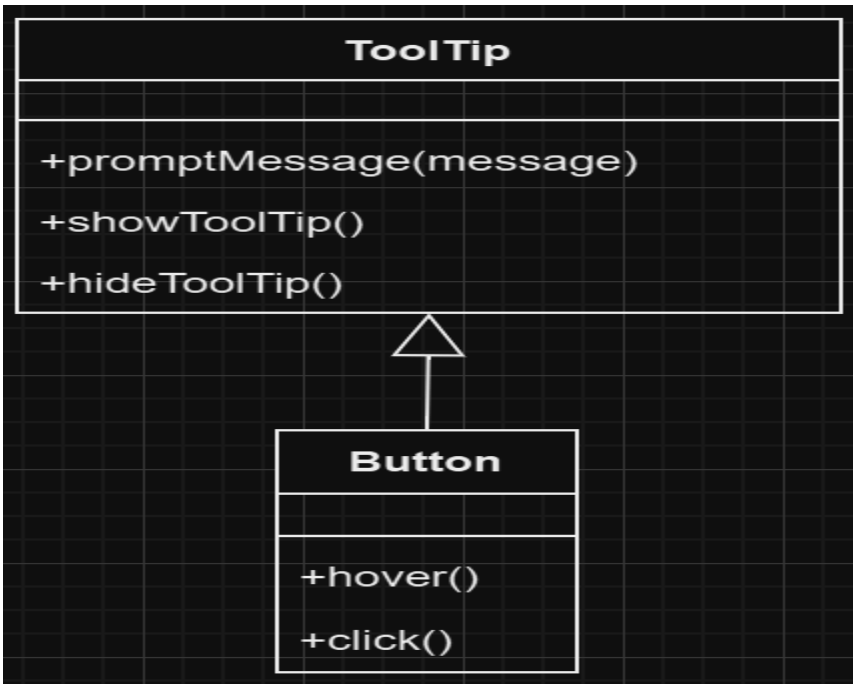


5. User Feedback and Error Handling
    - Instant Feedback: Provide instant feedback for user actions, such as form submissions and button clicks, to reassure users that their actions have been registered.
    - Error Messages: Display clear and concise error messages near the relevant input fields, explaining what went wrong and how to correct it.
    - Success Confirmation: Show confirmation messages for successful actions to inform users that their tasks have been completed.

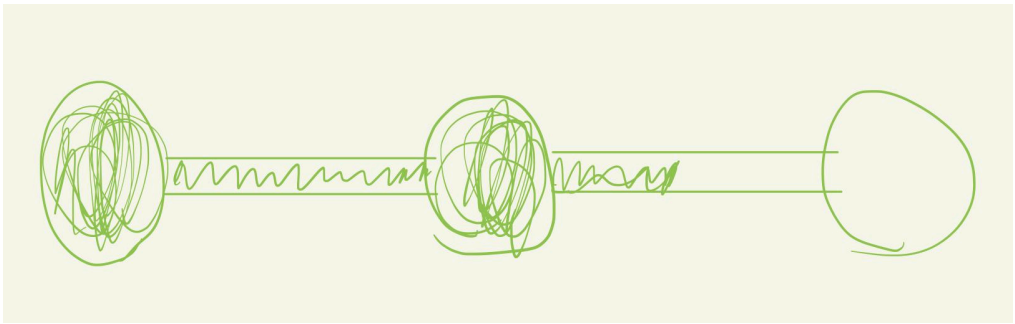
6. Clear and Consistent Language
    - Plain Language: Use plain language and avoid technical jargon to make the interface understandable for all users.
    - Consistent Terminology: Maintain consistent terminology throughout the platform to prevent confusion.
7. Visual Aids and Tooltips
    - Icons and Labels: Use intuitive icons paired with labels to help users quickly understand the function of different elements.

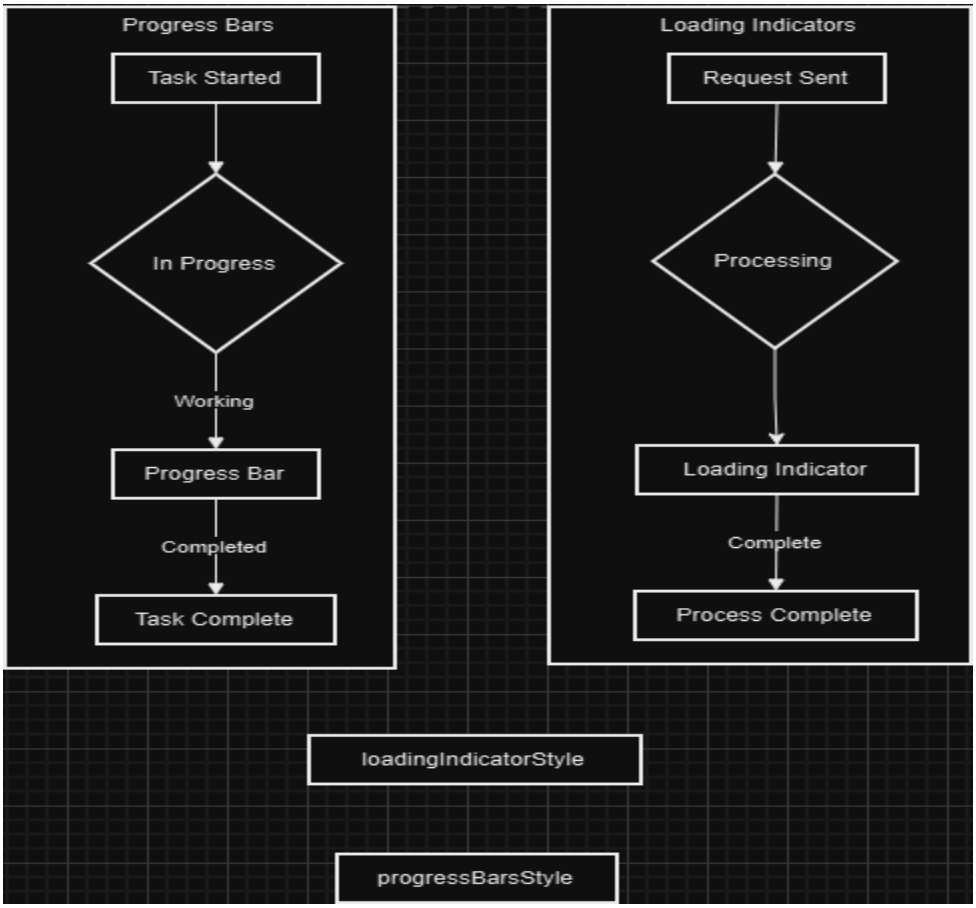
- Tooltips: Provide tooltips with additional information or explanations for complex features, enhancing user understanding without cluttering the interface.





8. Loading Indicators and Progress Bars
    - Visual Feedback for Loading: Use loading indicators of progress bars to inform users that the system is processing their requests.



- 
Progress Bars
Task Started
In Progress
Working
Progress Bar
Completed
Task Complete
Loading Indicators
Request Sent
Processing
Loading Indicator
Complete
Process Complete
loadingIndicatorStyle
progressBarsStyle