HeronAI Proof of Capability Framework

Resources: Mission and Vision; Us in the media; Up to date Figma + Original wireframe with notes

Why: HeronAI is super excited about the opportunity to work with you. After evaluating over 10 consulting firms we have honed in on your talent. HeronAI are looking for a long-term partner to help us build scalable, innovative solutions for our clients. To make the best decision, we are running a proof of capability (PoC) project to assess the capabilities, collaboration, and fit of you and one other consulting firm. This project is a paid opportunity to demonstrate how you approach real-world challenges and help us understand how we can work together effectively.

Scope:

1. **Build a Data Transformer**: Create a module that processes diverse client uploads (Excel/CSV) into:
    - Dynamic dashboards.
2. **Test Real-World Scenarios**: Work with various test files to evaluate how well the solution handles:
    - Accuracy (e.g., correctly processing data).
    - Performance (e.g., processing speed and scalability).
    - Reliability (e.g., handling different file structures and large datasets).
3. **Understand Collaboration**: Learn how your team tackles challenges, communicates progress, and documents solutions.
4. **Generate Insights**: Explore competitor analysis and provide actionable recommendations to strengthen HeronAI's market position.

What We're Testing

- **Positive control:** A data analyst to build the dashboard alone without specific information
- **Unstructured Excel**
- **Structured Excel**

NOTE: 4 technical replicates for each treatment group

- **Infrastructure**: Use AWS for scalable infrastructure and OpenTofu for cloud resource management.
- **KPIs:**
    - **Latency:**
        - Dashboard creation time (seconds): **< 60 seconds.**
    - **Accuracy:**

    - At least **95%** of generated dashboard titles are contextually accurate, even with ambiguous or unhelpful file names.
    - At least **90%** of graphs accurately represent the data from the processed files, validated against pre-defined test datasets.
    - Data processing should complete successfully for at least **98%** of test files without critical errors.
- **Fluency**
    - Parsed data matches the expected schema for **95%** of test files.
- **Performance:**
    - The transformer can process at least **10 datasets/hour** under normal load conditions.
    - All exceptions during processing are logged with sufficient detail for debugging **100%** of the time.
- **Scalability:**
    - Successfully processes files with up to **500,000 rows** of data without performance degradation or crashing.
    - Handles at least **2 different file structures** (e.g., structured Excel, and unstructured Excel) with equal reliability.

NOTE: A dashboard should be created so all stakeholders can follow along with the KPIs.

What Success Looks Like

Success in this PoC means:

1. You deliver a working data transformer module that meets accuracy, speed, and scalability benchmarks.
2. You generate actionable competitor insights with clear recommendations for HeronAI.
3. We build a strong working relationship and gain confidence in moving forward together.

Specific OKRs

OKR1:

Establish a functional data transformer for dashboards.

Acceptance Criteria: Transformer successfully processes sample files into valid JSON with 95% accuracy, validated against test cases.

Further information

Strategic Perspectives and Effects: The **financial perspective** focuses on reducing time spent processing client data by automating ETL processes, enabling HeronAI to onboard clients faster and minimize manual setup costs. This approach also aims to lower operational expenses by creating reusable, scalable transformation logic. During this time, I want to understand how you view the potential for delivering client-ready solutions to strengthen HeronAI's market position, build trust, and showcase innovation. Let's identify how reusable pipelines and clear documentation can improve development cycles, boost team productivity, and align consultant deliverables effectively.

The **primary strategic effects** include **network effects**, where the platform improves as more clients onboard, refining transformation rules and enhancing service quality. **Platform effects**

emerge as the transformer module becomes foundational to HeronAI's functionality, driving ease of use and long-term client retention. **Viral effects** are achieved as clients share their positive experiences, fostering organic growth. Additionally, **flywheel effects** build compounding value as client feedback continuously improves the transformer module. Among the **secondary effects**, **threshold effects** ensure significant scalability improvements once the PoC successfully processes diverse datasets. **Leverage effects** arise as automation reduces fixed labor costs, increasing profit margins with growing client volumes. **Scale effects** enable rapid adoption across industries through modular, reusable architecture, while **moat effects** create a defensible advantage by efficiently handling unstructured data at scale, differentiating HeronAI from less adaptable competitors.

Moving forward
If this PoC goes well, we will:

- Finalize a partnership for developing our MVP.
- Expand the scope to include:
    - Customizable dashboards.
    - Integration with QuickBooks and other tools.
    - Proprietary algorithms for advanced analytics.
- Scale the solution into a full platform with automation, analytics, and client-ready features.

Additional Resources:

- ☐ You will receive a mono-repo on HeronAI's Github to store your work
- ☐ A Google Drive will be shared to add all non-code documentation to
- ☐ You will be added to our slack channel for faster communication