SiliconPlan Customer Feedback Guideline

Document Version: 1.0

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Prepared by: QA Team

Executive Summary

This document provides a comprehensive translation of customer feedback for the SiliconPlan platform, covering both the landing page and the live web application. The feedback has been translated from Italian to English while preserving all original screenshots and maintaining the structure of the original document. This guideline serves as a reference for the development team to address identified issues and implement requested features.

Scope: Landing Page + Web Application

Environments:

- Landing (staging): https://siliconplan.vercel.app/
- Web App (production): https://www.silicon-plan.live/

Note: It is essential to clarify the difference between these environments and determine which should be used for testing to ensure that Luigi Senese's tests are conducted on the correct environment.

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1. Landing Page Observations

URL: https://siliconplan.vercel.app/

1.1 Brand and Design Consistency (UI/UX)

Logo and Identity: To maintain consistent branding across the platform and all exported documents (PDF, Word, PPT, pitch decks, etc.), it is essential to have the complete logo available in vector format. The following assets are required:

- Complete logo (symbol + logotype)
- Icon-only version
- Horizontal and vertical variants
- Light and dark versions
- Vector formats (SVG, AI, PDF)

1.2 Content and Functionality Analysis

Value Proposition (Hero Section): The main message "Empower Your Business from Idea to Investment" is clear and compelling. However, the subtitle mentions "Pitches & Financial Forecasts" without providing a strong visual preview of the "Companion AI" mentioned in the functional analysis.

Recommendation: Add a real preview, such as a mock screenshot of the dashboard/AI or a mini-flow demonstrating the "onboarding → output" process to give users a concrete understanding of the AI capabilities.

Call to Action (CTA): The button text should be simplified for better user engagement.

Current: "Create My First Plan"

Recommended: "Create My Plan"

Pricing Section:

The pricing packages displayed on the landing page do not align with the plan names indicated in the functional analysis. Specifically:

- Landing page shows: "Standard" ($20) and "Premium" ($40)
- Functional analysis indicates: "Free", "Start-up", "Unicorn"

Please refer to the pricing structure in the pitch deck: Pitch Deck Link

Inconsistencies identified:

1. The feature list includes elements such as QuickBooks/Xero integration that were not explicitly mentioned in the functional requirements. These should be removed or verified.
2. The claim of "550+ sample plans" is not currently supported. These could potentially be generated with AI to make them shareable; otherwise, this claim should be removed.

1.3 Technical Aspects and Gaps

Placeholder Data: The footer and contact sections contain placeholder phone numbers (+00 000 000 000). This should be replaced with the following real company data:

> **Silicon Plan** is a Smartool Srl product - Innovative Start-up
>
> Via Eleuterio Ruggiero 123, Caserta (CE)
>
> P.IVA 04738960618
>
> +39 0823 21 04 74 — info@siliconplan.com - pec:startool@pec.it

Social and Legal Links: The "Privacy & Terms of Service" and social media links are either not connected or lead to generic pages. The correct links are:

- Facebook: https://www.facebook.com/siliconplan
- Instagram: https://www.instagram.com/siliconplan/
- LinkedIn: https://www.linkedin.com/company/silicon-plan/?viewAsMember=true

Testimonials: The testimonials section appears with standard placeholder text. It should either be populated with real use cases or removed if authentic testimonials are not yet available.

1.4 Suggestions for Supplier Feedback

The following points should be communicated to the development supplier:

1. **Plan Alignment:** Align the pricing plans with those presented in the pitch deck.
2. **Real Data:** Insert real contact data, VAT number in the footer, and correct legal links.
3. **Asset Optimization:** Request vector files of the logo in all required formats.
4. **URL Verification:** Clarify the difference between the staging link (vercel.app) and the production link (silicon-plan.live) to ensure all tests are performed on the correct environment.

1.5 Minor Fixes

Typos and Copy Errors:

- "Standart" → "Standard"

- "Quaterly" → "Quarterly"

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2. Web Application Observations

URL: https://www.silicon-plan.live/

2.1 Critical Issues

Login / Password Recovery (P0)

Issue: The "Forgot password" function does not work on either desktop or mobile platforms.

Technical Note: Authentication and tenancy are based on Clerk (free plan), which may have limitations or misconfigurations.

Action Required: Verify password reset support and determine if an upgrade or custom configuration is necessary.

Onboarding / Workspace Setup – "Other" Fields (P1)

Issue: When selecting "Other" in dropdown fields, users cannot enter custom values.

Fields Affected:

- Industry
- Company stage
- Problem solved

Action Required: Enable free text input when "Other" is selected.

Onboarding Form – UX (P1)

Issue: The onboarding form is too long and poorly structured, creating friction in the user experience.

Action Required: Split the form into multiple screens or steps to reduce cognitive load and improve completion rates.

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3. Core Missing Features

3.1 Onboarding Redesign

The onboarding process should be redesigned as a wizard with pop-up slides asking single questions, similar to VentureKit's approach: https://www.venturekit.ai/business-plan/onboarding

Proposed Onboarding Flow:

Step 1: Create your workspace

Step 2: Business Name

Step 3: Is this company currently in operation?

Step 4: What do you need the business plan for? (Dropdown)

- Investors
- Banks
- Self-learning
- School/university project
- Work project
- Other reasons

Note: This question determines the tone, sections, and depth of financial projections in the generated plan.

Step 5: Select an industry in which your company operates

The industry selection should be linked to Damodaran industry data for accurate startup valuation multiples:
https://pages.stern.nyu.edu/~adamodar/New_Home_Page/datafile/vebitda.html

Sector Options (Macro-level, 12-16 items):

- Software / SaaS / IT
- IT Services / IT Consulting
- E-commerce / Retail / Marketplace
- FinTech / Payments / InsurTech
- Health / MedTech / Pharma
- Education / HR Tech
- Media / Publishing / Advertising
- Tourism / Hospitality / Food service
- Transport / Logistics

- Manufacturing / Industry
- Agri-food
- Energy / Utilities
- Construction / Real estate
- Professional services
- Business services
- Other (with description field)

Step 6: ATECO Code (Optional but recommended, autocomplete)

IMPORTANT: A call is needed to discuss the implementation of ATECO code integration.

Search by code or description. If the user doesn't know it, allow them to proceed. If they enter it, save it as the primary truth.

Implementation Consideration: This step simplifies sector information for the user. For determining valuation multiples, we reference Damodaran_industries sectors. In Italy, there are additional classifications with ATECO codes (ATECO_macros, ATECO_2digit_list). A comparative table has been created linking onboarding sectors, Damodaran sectors, and ATECO sectors, with three support sheets: ATECO_macros, ATECO_2digit_list, Damodaran_industries.

Reference:
https://docs.google.com/spreadsheets/d/1vRat8Yi3fKBkLlwqGtThemW4NDcwazA2/edit?usp=drive_link&ouid=115616849290016270970&rtpof=true&sd=true

Step 7: What problem do you solve, and for whom?

Step 8: What's your solution, and what makes it unique?

After completing the initial onboarding, allow users to enter additional information:

Step 9: Do you offer a product or a service? (Dropdown)

- Product
- Service
- Both

Step 10: How do you sell it? (Dropdown)

- Online
- Physical
- Both

Step 11: Target market (Multi-select)

- Italy
- Europe
- Global / USA / Other (with text field)

Step 12: Team size (Dropdown)

- 1
- 2-5
- 6-10
- 11+

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4. Workspace Structure & Usability

4.1 Edit Workspace

User Invitations (P1)

Issue: There is no visibility on sent invitations.

Missing Features:

- List of invited users
- Status indicators (pending, accepted, declined, expired)
- Basic actions (resend, revoke)

Action Required: Create a "Team/Users" section with status tracking and management capabilities.

Delete Workspace

Issue: The ability to delete a project is missing.

Action Required: Add a delete function with confirmation dialog and warning about data loss.

Language Support

Issue: Italian language support is missing in the UI and page content.

Action Required: Implement a language toggle (EN/IT) on main pages and for exports.

Section Naming and Clarity

Issue: The "Edit your workspace" section name is not intuitive. It appears to be an editor but functions as a setup interface.

Action Required: Rename to "Setup Business" or similar to clarify its function.

AI Gemini Limitations

Issue: In "Edit your workspace," the AI Gemini only allows correcting the description but does not support research or regeneration capabilities.

Action Required: Enhance AI capabilities to include research and content regeneration.

AI Knowledge Section

Issues identified:

1. Excel files (budgets, quantitative business plans) cannot be uploaded to the AI Knowledge section.
2. Uploaded descriptions are not saved properly.
3. The AI does not consider uploaded information when generating business plan content.
4. AI Knowledge entries are not editable, only deletable.

Action Required:

- Enable Excel file uploads
- Fix save functionality for descriptions
- Integrate uploaded knowledge into AI content generation
- Add edit capability for AI Knowledge entries

AI Library Issues

Issues identified:

1. Drag-and-drop functionality does not work.
2. Long file names create display and usability issues.

Action Required:

- Implement functional drag-and-drop
- Improve file name handling and display

4.2 Manage Workspace

Current Issues:

1. **Task Usability:** Once tasks are completed, users cannot write inside them or recall the AI to write automatically. The purpose of many buttons is not intuitive.
2. **AI Chat Limitations:** Pasting a summary into the AI Chat or plan chapters does not create tasks as expected.
3. **Data Automation Gap:** Information loaded in the Editor Workspace and project library is not automatically processed and integrated by the AI within individual tasks. Users must re-enter information for each task.

Objective: Implement a task system that guides users through the business plan creation process with a clear hierarchy (Heading 1 / Heading 2) as outlined in the summary structure.

Action Required: Develop tasks that guide the logical flow users must follow. Reference document: https://drive.google.com/file/d/1uAN49cDtkHCwUi_s0jdQCrVrIGUtkFae/view?usp=drive_link

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5. Business Plan Task Structure

The platform should guide users through business plan creation with a structured, hierarchical task system. Each task should include:

- **Title:** Clear section heading
- **User Instructions:** Simple explanation of what to write (minimum 3 lines)
- **AI Prompt:** Instructions for the AI to generate consistent content

5.1 Proposed Chapter Structure

Summary

1. Business Fundamentals

- 1.1 The Business Idea
- 1.2 The Problem to Solve
- 1.3 The Relevance of the Problem
- 1.4 Description of the Solution
- 1.5 The Team
- 1.6 Mission and Vision

2. Market and Competitive Advantage

- 2.1 Market Needs
- 2.2 TAM SAM SOM Analysis
- 2.3 Market Segmentation
- 2.4 Competitor Analysis
- 2.5 Primary and Secondary Market Research
- 2.6 Problem-Solution Fit
- 2.7 Point of Difference

3. Business Model Canvas

- 3.1 Target Customer
- 3.2 Value Proposition
- 3.3 Channels
- 3.4 Customer Relationships
- 3.5 Key Activities
- 3.6 Key Resources
- 3.7 Key Partners
- 3.8 Revenue Streams
- 3.9 Cost Structure

4. Go-to-Market Strategy

- 4.1 Marketing Objectives
- 4.2 Minimum Viable Product (MVP)
- 4.3 Price Point
- 4.4 Customer Engagement
- 4.5 Promotion
- 4.6 Distribution

5. Metrics and Economic-Financial Analysis

- 5.1 Revenue Estimate
- 5.2 Cost Estimate
- 5.3 Customer Acquisition Cost (COCA)
- 5.4 Customer Lifetime Value (LTV)
- 5.5 Economic-Financial Plan

- 5.6 Pre-money Valuation

6. Pitch

- 6.1 Pitch Deck (12 sections)
- 6.2 Financial Highlights
- 6.3 Ask (funding or partnership)

5.2 Example Task Templates

1.1 The Business Idea

What you need to write (User Instructions):

Here you need to clearly and comprehensively explain what you want to build. It's not enough to say "I have an idea" - you must explain what you're selling (product or service), to whom you're selling it, and why someone should buy it. Include a brief context: which sector you're in, what type of customer you want to serve, and what result you promise. If your idea is "innovative," explain what the innovation consists of - it doesn't have to be technology; it could also be a new sales model or a better way of doing something that already exists.

AI Prompt:

"Write the 'Business Idea' section explaining what the company offers, who it targets, which sector it operates in, and what benefits it generates. Use data: {company_description}, {product_type}, {industry_macro}, {market_geo}. Tone should be clear and credible. 250-350 words. If details are missing, formulate hypotheses and declare them."

2.2 TAM SAM SOM Analysis

What you need to write (User Instructions):

TAM, SAM, and SOM help answer a simple question: how big is the market, and how much of that market can you realistically capture? TAM is the total market, SAM is the portion you can serve (by geography and target), and SOM is what you can realistically achieve in the first years. Even if you don't have perfect numbers, you must show reasoning: how you calculate, what assumptions you use, and why they're credible. This section is fundamental for investors and banks.

AI Prompt:

"Generate 'TAM SAM SOM'. If the user doesn't provide numbers, propose top-down and bottom-up methods and a table to fill in. If numbers are provided, ensure definitions and calculations are consistent."

5.3 Customer Acquisition Cost (COCA)

What you need to write (User Instructions):

COCA (or CAC) tells you how much it costs to acquire a customer. It's calculated by dividing marketing and sales expenses in a period by the number of customers acquired in the same period. It's important because it helps you understand if the business is sustainable: if you spend €200 to acquire a customer who brings you €50, it doesn't work. Even if you're at the beginning and don't have real data, you can estimate it and explain how you'll reduce it over time (improving conversion, referral, SEO, partnerships).

AI Prompt:

"Calculate and explain COCA. If data is missing, provide formula, example, and table to fill in (expense, period, new customers, COCA). Suggest 3 levers to reduce COCA over time."

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6. Additional Fixes

6.1 AI Tone of Voice

Issue: The AI-generated content lacks customization for tone of voice.

Action Required: Insert tone of voice options in the AI settings (examples: professional, academic, conversational, technical).

6.2 Workspace Logo

Issue: The workspace logo is not properly formatted in various export formats.

Action Required: Allow users to insert their workspace logo to improve adaptation to various formats and ensure consistent branding.

6.3 Export Document Margins

Issue: Exported documents don't appear to be properly formatted for A4 size, and margins are inconsistent.

Required Margins: 2.5 cm on all sides (top, bottom, left, right)

Action Required:

- Verify and fix page settings for exports
- For Canvas: Check page settings (margins, landscape printing)
- Ensure text does not extend beyond designated boxes
- Perform print tests to verify formatting

6.4 Font Sizing

Issue: Font sizes are not properly differentiated according to text type.

Action Required: Implement consistent font sizing hierarchy:

- Titles: [specify size]
- Headings: [specify size]
- Body text: [specify size]
- Descriptions: [specify size]

6.5 Chatbot Interface

Issue: The AI chat interface could be more prominent and accessible.

Recommendation: Instead of the current AI chat implementation, create a section on the left tab called "Ask AI" to better highlight the AI capabilities for each section individually. Consider using an icon-based interface.

6.6 Export Formats

Required Export Formats:

- **Business Plan:** PDF and Word (.docx)
- **Pitch:** PDF and PowerPoint (.pptx)
- **Canvas:** PDF and PowerPoint (.pptx)

Action Required: Ensure all export formats are functional and properly formatted.

6.7 Pitch Preset Sections

Issue: The pitch generation needs predefined sections to ensure completeness.

Required Pitch Sections:

1. The Problem
2. The Solution
3. The Product
4. The TAM SAM SOM Market
5. Business Model
6. Traction
7. Competitors
8. Go to Market

9. Financial Forecast (3-4 years)
10. Team

Action Required: Implement these as preset sections in the pitch generation module.

6.8 Financial Plan Editability

Issue: The AI-generated financial plan is not editable, and currency is fixed to USD.

Action Required:

- Make financial plans editable
- Support multiple currencies
- Allow users to customize financial projections

6.9 Pitch and SWOT Editability

Issue: Generated pitch and SWOT analysis are not editable.

Action Required: Enable editing capabilities for both pitch and SWOT analysis outputs.

6.10 Export Formatting Issues

Issue: Exporting to Word and PowerPoint results in formatting problems.

Action Required: Fix export functionality to maintain proper formatting in Word and PowerPoint outputs.

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7. Bug Reports

7.1 Priority 0 (Critical)

Login / Password Recovery

- **Issue:** "Forgot password" function does not work on desktop or mobile
- **Technical Note:** Auth/tenancy based on Clerk (free plan) may have limitations
- **Action:** Verify password reset support and upgrade requirements

7.2 Priority 1 (High)

Onboarding - "Other" Fields

- **Issue:** Selecting "Other" doesn't allow custom value input
- **Affected Fields:** Industry, Company stage, Problem solved

- **Action:** Enable free text input for "Other" selections

Onboarding Form UX

- **Issue:** Form is too long and poorly structured
- **Action:** Split into multiple steps to reduce friction

User Invitations

- **Issue:** No visibility on sent invitations
- **Action:** Create Team/Users section with status tracking

Conclusion

This guideline document provides a comprehensive overview of all customer feedback for the SiliconPlan platform. The development team should prioritize issues based on their severity (P0, P1) and implement the requested features systematically. Regular testing and validation should be conducted to ensure all fixes and new features meet user expectations and improve the overall platform experience.

For any questions or clarifications regarding this feedback, please contact the QA team or refer to the original Italian document.

Document End