**Business Requirements Document (BRD)**

**Project Name:** BizChat Multi-AI Optimization (2025)  
**Version:** 1.0  
**Date:** September 4, 2025

**1. Executive Sumary**

This document defines the requirements for transforming the **BizChat AI-powered business planning platform** from a research prototype into a **commercially successful product**.

The current platform faces three critical challenges:

* **Low completion rates (45%)**
* **Poor content quality (avg. 6.2/10)**
* **Weak funding outcomes (23% success rate)**

The proposed enhancement introduces a **Claude 3.5 Sonnet integration, industry-specific AI templates, automated quality validation**, and a **structured expert consultation workflow**. Together, these features will significantly improve plan quality, user success, and platform revenue.

This work builds on foundational research by **Quentin Romero Lauro, Aakash Gautam, and Yasmine Kotturi (University of Pittsburgh & UMBC)** and extends it with a commercial strategy to achieve measurable market success.

**2. Project Overview & Scope**

**2.1 Problem Statement**

Current limitations preventing BizChat’s success:

* Only **45% of users** finish business plans.
* Plans average **6.2/10 quality score**, too weak for funding.
* No measurement of real funding outcomes.
* Generic, one-size-fits-all AI content.
* Limited expert involvement in plan validation

### 2.2 Business Objectives

* **Improve Quality:** Raise average plan score to **8.5/10.**
* **Boost Success:** Increase funding success from **23% → 42%** in 12 months.
* **Enhance Retention:** Raise completion rate from **45% → 75%.**
* **Grow Revenue:** Scale ARR from **$50K → $200K** (+300%).
* **Lead Market:** Position BizChat as the #1 AI-driven business planning tool.

### 2.3 Scope

**In-Scope:**

* Claude 3.5 Sonnet as core engine, GPT-4 fallback.
* 5 industry-specific prompt templates (Tech, Retail, Services, Food, Manufacturing).
* Automated scoring system with improvement loop.
* Expert consultation workflow with AI-generated discussion guides.
* Success tracking (funding outcomes, retention, quality correlation).
* Premium tier with advanced features.

**Out-of-Scope:**

* Full platform redesign or tech stack change.
* Direct integration with funding institutions.
* Mobile app development.
* International language/localization.

## 3. Stakeholders

* **BizChat Management:** Define strategy, ROI, and market positioning.
* **Small Business Owners:** End-users seeking funding-ready business plans.
* **Business Coaches/Experts:** Provide domain-specific guidance.
* **Development Team:** Build and integrate new features.
* **Research Team (University of Pittsburgh & UMBC):** Original platform creators.
* **Funding Organizations:** Evaluate and validate submitted plans.

## 4. Process Models

### 4.1 As-Is (Current State)

1. User enters basic details.
2. GPT-4 generates generic content.
3. User edits manually, no quality feedback.
4. Plan exported, no outcome tracking.

### 4.2 To-Be (Future State)

1. User registers + selects **industry category**.
2. **Claude 3.5 Sonnet** generates tailored content via specialized prompts.
3. Automated scoring system provides quality rating + improvement suggestions.
4. Users optionally consult experts with AI-guided questions.
5. Export **investment-ready plan** with premium options.
6. Success outcomes (funding, revisions, usage) tracked via analytics.

## 5. Requirements

### 5.1 Functional

* **FR-01:** Integrate Claude 3.5 Sonnet (primary) + GPT-4 fallback.
* **FR-02:** Industry routing for 5 business categories.
* **FR-03:** Quality scoring system with **85% alignment to expert ratings.**
* **FR-04:** Auto-regeneration for scores <6.0, improvement tips for <7.0.
* **FR-05:** Expert matching algorithm (response ≤24 hours).
* **FR-06:** Structured consultation workflow with AI-prepared questions.
* **FR-07:** Automated follow-up surveys (3, 6, 12 months).
* **FR-08:** Analytics dashboard (real-time KPIs, correlations).

### 5.2 Non-Functional

* **NFR-01:** Plan generation ≤5 mins; validation ≤60s.
* **NFR-02:** Scale: 5,000 users, 100 simultaneous generations.
* **NFR-03:** 99.5% uptime during business hours.
* **NFR-04:** Full GDPR/CCPA compliance, encrypted data.
* **NFR-05:** Mobile-responsive UI, WCAG 2.1 AA accessibility.

**6. Risks and Mitigation**

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| Risk ID | Risk Description | Impact | Mitigation Strategy |
| **R-01** | **AI Model Dependency:** Claude 3.5 Sonnet API unavailability disrupts primary content generation | High | 1. Implement automatic failover to GPT-4 within 5 seconds  2. Monitor API health and establish SLA agreements  3. Maintain backup content generation capacity |
| **R-02** | **Quality Validation Accuracy:** Automated scoring may not correlate with real funding success outcomes | High | 1. Establish expert validation panel for scoring calibration  2. Implement continuous learning from user feedback  3. Track correlation between quality scores and funding outcomes |
| **R-03** | **Expert Network Capacity:** Increased consultation demand may exceed available expert capacity | Medium | 1. Proactive expert recruitment and onboarding program  2. Implement tiered consultation options (basic vs premium)  3. Smart scheduling and load balancing algorithms |
| **R-04** | **User Adoption Resistance:** Existing users may resist new process steps or quality requirements | Medium | 1. Gradual rollout with clear value demonstration  2. Comprehensive user communication and tutorial materials  3. Maintain basic tier for users preferring simple workflow |
| **R-05** | **Data Privacy Breach:** Enhanced data collection for success tracking increases privacy risk exposure | High | 1. Implement strict data minimization and anonymization  2. Ensure all data processing meets regulatory compliance  3. Provide transparent user consent and opt-out mechanisms |

## 7. Success Metrics

**Primary KPIs:**

* Completion: **45% → 75%**
* Plan Quality: **6.2 → 8.5/10**
* Funding Success: **23% → 42%**
* ARR: **$50K → $200K**

**Secondary KPIs:**

* Retention (6-month): **34% → 67%**
* Expert Consultation Usage: **12% → 35%**
* Premium Conversions: **15% target**
* User Satisfaction: **≥8.0/10**

## 8. Implementation Timeline

**Phase 1 (Weeks 1–2): Core AI Upgrade**

* Claude 3.5 integration, industry routing.
* Basic quality validation + beta testing.

**Phase 2 (Weeks 3–4): Advanced Quality Layer**

* Scoring improvements, auto-regeneration, feedback UI.
* Performance optimization.

**Phase 3 (Weeks 5–6): Expert Integration**

* Expert matching + structured workflow.
* Expert onboarding & training.

**Phase 4 (Weeks 7–8): Tracking & Analytics**

* Funding outcome tracking + surveys.
* Analytics dashboard + reporting.
* Full system integration & launch.