**Business Requirements Document (BRD)**

**Project Name:** BizChat Platform Commercial Enhancement  
**Version:** 1.0  
**Date:** September 3, 2025

**1. Executive Sumary**

This document outlines the business requirements for transforming the BizChat AI-powered business planning platform from a research prototype into a commercially viable product. The current platform suffers from low user completion rates (45%), poor content quality (6.2/10 average), and limited funding success outcomes (23% success rate).

The proposed enhancement implements a multi-AI orchestration system with Claude 3.5 Sonnet integration, industry-specific routing, automated quality validation, and structured expert consultation workflow. This solution will significantly improve business plan quality, user success rates, and platform revenue.

The project builds upon excellent foundational research by Quentin Romero Lauro, Aakash Gautam, and Yasmine Kotturi from University of Pittsburgh and UMBC, while adding commercial optimization to achieve market viability and measurable user success outcomes.

**2. Project Overview & Scope**

**2.1 Problem Statement**

The current BizChat platform faces critical challenges preventing commercial success:

* **Low User Completion:** Only 45% of users complete the business plan creation process
* **Poor Content Quality:** Average business plan quality score of 6.2/10, insufficient for funding applications
* **Limited Success Tracking:** No measurement of real-world funding outcomes or user success
* **Generic AI Output:** One-size-fits-all approach lacks industry-specific expertise
* **Minimal Expert Integration:** Basic "connect with expert" feature provides limited value

**2.2 Business Objectives**

* **Improve Content Quality:** Achieve 8.5/10 average business plan quality score through specialized AI models
* **Increase User Success:** Raise funding success rate from 23% to 42% within 12 months
* **Enhance Platform Performance:** Achieve 75% user completion rate (67% improvement)
* **Drive Revenue Growth:** Scale Annual Recurring Revenue from $50K to $200K (300% increase)
* **Build Market Leadership:** Establish platform as premier AI business planning solution

**2.3 Scope**

* **In-Scope:**
  + Multi-AI content generation with Claude 3.5 Sonnet integration
  + Industry-specific routing for 5 major business categories
  + Automated quality validation and scoring system
  + Expert network integration with structured consultation workflow
  + Success outcome tracking and analytics dashboard
  + Premium tier implementation with advanced features
* **Out-Scope:**
  + Complete platform redesign or technology stack changes
  + Integration with external funding platforms or financial institutions
  + Mobile application development
  + International localization and multi-language support

**3. Stakeholders**

* **Platform Management:** Business stakeholders responsible for ROI and market positioning
* **Small Business Owners:** Primary end-users creating business plans for funding applications
* **Business Coaches/Experts:** Professional network providing specialized guidance and feedback
* **Development Team:** Technical implementation of enhanced AI and platform features
* **Original Research Team:** Academic researchers who developed foundational BizChat platform
* **Funding Organizations:** Banks, investors, and grant providers evaluating business plans

**4. Process Models**

**4.1 As-Is Process (Current State)**

1. User registers account and enters basic business information
2. GPT-4-turbo generates generic business plan sections using one-size-fits-all approach
3. User receives unvalidated content with no quality assessment
4. User manually edits content using rich-text editor
5. User exports business plan in standard format
6. No follow-up or success outcome tracking

**4.2 To-Be Process (Future State)**

1. User registers and **selects industry category** from 5 specialized options
2. **Industry-specific AI routing** directs content to Claude 3.5 Sonnet with specialized prompts
3. **Automated quality validation** scores content and provides improvement recommendations
4. User receives **high-quality, industry-relevant** business plan with quality feedback
5. **Optional expert consultation** with AI-generated discussion questions and structured feedback
6. User exports **investment-ready business plan** with premium formatting options
7. **Success tracking system** monitors funding outcomes and provides platform optimization data

**5. Requirements**

**5.1 Functional Requirements**

* **FR-01:** System must implement Claude 3.5 Sonnet as primary AI model with GPT-4 fallback capability
* **FR-02:** Platform must provide industry-specific routing for Restaurant/Food, Retail/E-commerce, Technology/SaaS, Professional Services, and Manufacturing sectors
* **FR-03:** Automated quality validation must score business plans on 1-10 scale with 85% correlation to expert evaluations
* **FR-04:** System must generate improvement suggestions for plans scoring below 7.0 and auto-regenerate plans scoring below 6.0
* **FR-05:** Expert matching algorithm must connect users with industry-specialized business coaches within 24 hours
* **FR-06:** Platform must provide structured consultation workflow with AI-generated questions and feedback integration
* **FR-07:** Success tracking system must conduct automated follow-up surveys at 3, 6, and 12-month intervals post-export
* **FR-08:** Analytics dashboard must provide real-time performance metrics and success correlation analysis

**5.2 Non-Functional Requirements**

* **NFR-01:** Business plan generation must complete within 5 minutes with quality validation within 60 seconds
* **NFR-02:** System must support 5,000 registered users with 100 simultaneous business plan generations
* **NFR-03:** Platform availability must maintain 99.5% uptime during business hours
* **NFR-04:** All business plan content must be encrypted end-to-end with GDPR/CCPA compliance
* **NFR-05:** User interface must be mobile-responsive and accessible (WCAG 2.1 AA standards)

**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:**

* User Completion Rate: 45% → 75% (+67% improvement)
* Business Plan Quality Score: 6.2/10 → 8.5/10 (+37% improvement)
* Funding Success Rate: 23% → 42% (+83% improvement)
* Platform Revenue (ARR): $50K → $200K (+300% increase)

**Secondary KPIs:**

* User Retention (6-month): 34% → 67% (+97% improvement)
* Expert Consultation Rate: 12% → 35% (+192% increase)
* Premium Tier Conversion: Target 15% of free users
* User Satisfaction Score: Target 8.0/10

**8. Implementation Timeline**

**Phase 1: Core AI Enhancement (Weeks 1-2)**

* Claude 3.5 Sonnet integration and industry routing deployment
* Basic quality validation system implementation
* A/B testing with beta user group (n=100)

**Phase 2: Quality Validation System (Weeks 3-4)**

* Advanced quality scoring and improvement recommendation system
* User interface enhancements for quality feedback integration
* Performance optimization and integration testing

**Phase 3: Expert Network Integration (Weeks 5-6)**

* Expert matching algorithm and consultation workflow deployment
* Structured feedback system and recommendation capture
* Expert onboarding and training program execution

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

* Outcome tracking system and automated survey implementation
* Analytics dashboard and performance reporting features
* Full system integration testing and production deployment