

# Product Requirements Document (PRD)

## AI Adoption Readiness Assessment Tool

### Version 2.0 — With Priority Fixes Implemented

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## Executive Summary

This document outlines the requirements for a web-based AI Adoption Readiness Assessment Tool designed to help small business owners evaluate their preparedness for AI implementation. The tool serves dual purposes: providing genuine value to users through personalized assessments while capturing qualified leads for follow-up services.

#### Version 2.0 Changes:

- Revised scoring logic to fix inversions (team size, concern level)
  - Added cross-dimensional validation rules
  - Specified AI analysis prompts for free-text evaluation
  - Added comprehensive roadmap generation specification
  - Added "Don't know" options to key questions
  - Implemented question dependencies for better UX
  - Adjusted minimum scores from 0 to 1 where appropriate
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## Product Vision & Objectives

### Primary Goals

Goal	Description
Lead Generation	Capture qualified small business leads interested in AI adoption

Value Delivery	Provide actionable insights that establish credibility and trust
Market Positioning	Position as a thought leader in SMB AI adoption
User Engagement	Create a memorable experience that encourages sharing and referrals
Assessment Response	Responses to assessment questions will be captured and added to database via N8N (form or webhook)
Data Capture	

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## User Personas

### Primary Persona: Small Business Owner "Sarah"

- **Business Size:** 5-50 employees
- **Revenue:** \$500K-\$5M annually
- **Tech Comfort:** Moderate (uses cloud tools but not cutting-edge)
- **Pain Points:** Time management, scaling operations, staying competitive, revenue growth impediments
- **Motivation:** Wants to understand how AI can help grow their business but unsure where to start

### Secondary Persona: Operations Manager "Mike"

- **Role:** Day-to-day operations oversight
  - **Tech Comfort:** Above average
  - **Pain Points:** Manual processes, data silos, reporting bottlenecks, high volume error-prone tasks
  - **Motivation:** Looking for efficiency gains to present to leadership
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## Assessment Structure

### Section 1: Business Profile & Foundation

**Purpose:** Establish baseline context for personalized recommendations

**Weight:** Foundational (used for segmentation, not direct scoring)

**Estimated Time:** 2-3 minutes

## Questions

ID	Question	Type	Options	Required
BP-01	What industry are you in?	Dropdown	Retail, Healthcare, Finance, Manufacturing, Professional Services, Food & Hospitality, Construction, Technology, Other	Yes
BP-02	How many employees do you have?	Single Select	1-5, 6-15, 16-50, 51-100, 100+	Yes
BP-03	How long have you been running your business?	Single Select	Less than 1 year, 1-3 years, 3-5 years, 5-10 years, 10+ years	Yes
BP-04	What is your approximate annual revenue?	Single Select	Under \$100K, \$100K-\$500K, \$500K-\$1M, \$1M-\$5M, \$5M+, Don't know/Prefer not to say	Yes
BP-05	Please briefly describe your core business model and primary products/services.	Free Text	No char limit	Yes
BP-06	Please briefly describe your business goals and objectives over the next 6, 12 & 18 months	Free Text	No char limit	Yes

## Scoring Logic for Section 1

**Note:** Section 1 is primarily for segmentation and personalization. Points contribute to Data Readiness and Organizational Readiness dimensions.

javascript

```
// Data Volume Indicator (contributes to Data Readiness)
// UPDATED: More data history = better AI training potential
function calculateDataVolumeScore(employees, yearsInBusiness) {
  let score = 0;

  // Employee factor - more employees = more data generated
  const employeeScores = {
```

```

    "1-5": 1,
    "6-15": 1.5,
    "16-50": 2,
    "51-100": 2.5,
    "100+": 3
};

score += employeeScores[employees];

// Years factor - longer history = more historical data
const yearsScores = {
    "Less than 1 year": 0.5,
    "1-3 years": 1,
    "3-5 years": 1.5,
    "5-10 years": 2,
    "10+ years": 2.5
};

score += yearsScores[yearsInBusiness];

return score; // Max: 5.5 points, normalized to 5
}

// UPDATED: Team Size Score (contributes to Organizational Readiness)
// Uses bell curve - mid-sized teams score highest (enough resources, not too complex)
function calculateTeamSizeScore(employees) {
    const scores = {
        "1-5": 2,    // Limited bandwidth for change management
        "6-15": 3,   // Sweet spot - manageable size, dedicated resources possible
        "16-50": 3,  // Sweet spot - has resources, still agile
        "51-100": 2.5, // More complex change management needed
        "100+": 2    // Enterprise complexity, but has resources
    };
    return scores[employees]; // Max: 3 points
}

// Revenue Indicator (contributes to Budget & Resources)
function calculateRevenueScore(revenue) {
    const scores = {
        "Under $100K": 1,
        "$100K-$500K": 2,
        "$500K-$1M": 2.5,
        "$1M-$5M": 3,
        "$5M+": 3,
        "Don't know/Prefer not to say": 2 // Neutral middle score
    };
}

```

```

    return scores[revenue]; // Max: 3 points
}

```

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## Section 2: Technology Infrastructure

**Purpose:** Assess current technology capabilities and foundation

**Weight:** 20% of total score (20 points max)

**Estimated Time:** 2-3 minutes

### Questions

ID	Question	Type	Options	Required	Points
TI-01	How would you rate your current technology adoption?	Single Select	Very Basic (paper/spreadsheets), Moderate (some cloud tools), Advanced (integrated systems), Cutting-edge, Don't know	Yes	1-5
TI-02	Do you currently use any cloud-based software?	Single Select	Yes - extensively, Yes - somewhat, No - but interested, No - not interested	Yes	1-4
TI-03	What business software do you currently use?	MultiSelect	CRM, Accounting Software, Project Management, E-commerce Platform, Marketing Automation, Inventory Management, HR/Payroll, Other, None	Yes	1-4
TI-04	How is your business & customer data currently stored?	Single Select	Paper records, Spreadsheets, Basic database, CRM system, Multiple integrated systems, Don't know	Yes	1-4
TI-05	How comfortable is your team with learning new software?	Scale 1-5	1 = Very resistant, 5 = Eager adopters	Yes	1-3

TI-06	Please describe any current technology frustrations or limitations causing bottlenecks	Free Text	No char limit	No	N/A
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## Scoring Logic for Section 2

javascript

```
const technologyInfrastructureScoring = {
    // TI-01: Current Technology Adoption (Max: 5 points)
    // UPDATED: Minimum score of 1, added "Don't know" option
    currentTechAdoption: {
        "Very Basic (paper/spreadsheets)": 1,
        "Moderate (some cloud tools)": 2.5,
        "Advanced (integrated systems)": 4,
        "Cutting-edge": 5,
        "Don't know": 2 // Neutral score
    },
    // TI-02: Cloud Software Usage (Max: 4 points)
    // UPDATED: Minimum score of 1
    cloudSoftwareUsage: {
        "No - not interested": 1,
        "No - but interested": 1.5,
        "Yes - somewhat": 3,
        "Yes - extensively": 4
    },
    // TI-03: Software Stack Diversity (Max: 4 points)
    // UPDATED: Minimum score of 1
    softwareStackDiversity: function(selectedTools) {
        const count = selectedTools.filter(t => t !== "None").length;
        if (count === 0) return 1;
        if (count <= 2) return 2;
        if (count <= 4) return 3;
        if (count <= 6) return 3.5;
        return 4; // 7+
    },
    // TI-04: Data Storage Method (Max: 4 points)
    // UPDATED: Minimum score of 1, added "Don't know"
    dataStorageMethod: {

```

```

    "Paper records": 1,
    "Spreadsheets": 1.5,
    "Basic database": 2.5,
    "CRM system": 3.5,
    "Multiple integrated systems": 4,
    "Don't know": 2
};

// TI-05: Team Software Comfort (Max: 3 points)
// Note: Also contributes to Organizational Readiness
teamSoftwareComfort: function(rating) {
    if (rating <= 2) return 1;
    if (rating === 3) return 2;
    return 3; // 4-5
};

// Total Section 2 Score Calculation
function calculateTechInfrastructureScore(responses) {
    let total = 0;
    total += technologyInfrastructureScoring.currentTechAdoption[responses.TI01];
    total += technologyInfrastructureScoring.cloudSoftwareUsage[responses.TI02];
    total += technologyInfrastructureScoring.softwareStackDiversity(responses.TI03);
    total += technologyInfrastructureScoring.dataStorageMethod[responses.TI04];
    total += technologyInfrastructureScoring.teamSoftwareComfort(responses.TI05);
    return total; // Max: 20 points
}

```

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## Section 3: Business Processes & Pain Points

**Purpose:** Identify automation opportunities and AI fit

**Weight:** 15% of total score (15 points max)

**Estimated Time:** 3-4 minutes

### Questions

ID	Question	Type	Options	Required	Points
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PP -01	Which types of tasks demand the most of your staff's time?	Multi-Select (Top 3)	Sales, Customer inquiries, Data entry, Scheduling, Invoicing/Billing, Inventory tracking, Report generation, Email management, Social media, Lead follow-up, Content creation, Other	Yes	N/A*
PP -02	How do you currently handle customer support?	Single Select	Phone only, Email only, Phone + Email, Chat widget, Social media DMs, Combination of multiple channels	Yes	1-5
PP -03	What is your biggest operational challenge?	Single Select	Finding/retaining talent, Scaling operations, Customer acquisition, Cash flow management, Time management, Competition, Other	Yes	N/A*
PP -04	How repetitive are your daily business tasks?	Scale 1-5	1 = Mostly unique work, 5 = Highly repetitive	Yes	1-5
PP -05	How much time does your team spend on manual data entry weekly?	Scale 1-5	1 = Minimal, 5 = Significant	Yes	1-5
PP -06	What are your top 3 business challenges that you believe technology might help solve?	Free Text	No char limit	Yes	AI Analyzed
PP -07	Please describe a typical workflow or business process that feels inefficient	Free Text	No char limit	No	AI Analyzed

\*Used for recommendation personalization, not direct scoring

### Scoring Logic for Section 3

javascript

```
const processMaturityScoring = {
```

// PP-02: Customer Support Channels (Max: 5 points)

```

customerSupportChannels: {
  "Phone only": 1,
  "Email only": 2,
  "Phone + Email": 3,
  "Chat widget": 4,
  "Social media DMs": 3,
  "Combination of multiple channels": 5
},
// PP-04: Task Repetitiveness (Max: 5 points)
// Higher repetitiveness = better AI automation fit
taskRepetitiveness: function(rating) {
  return rating; // Direct mapping 1-5
},
// PP-05: Manual Data Entry Time (Max: 5 points)
// More manual work = higher AI potential
manualDataEntryTime: function(rating) {
  return rating; // Direct mapping 1-5
},
// Total Section 3 Score Calculation
function calculateProcessMaturityScore(responses) {
  let total = 0;
  total += processMaturityScoring.customerSupportChannels[responses.PP02];
  total += processMaturityScoring.taskRepetitiveness(responses.PP04);
  total += processMaturityScoring.manualDataEntryTime(responses.PP05);
  return total; // Max: 15 points
}

```

## AI Analysis Prompts for Free-Text Questions (PP-06, PP-07)

### NEW SECTION: Detailed prompts for AI evaluation of free-text responses

javascript

```

// AI Analysis Configuration for PP-06 and PP-07
const processAnalysisPrompt = {
  systemPrompt: `You are an AI analyst evaluating business process descriptions for AI adoption
readiness.
Your task is to score the quality and actionability of the user's response.

```

SCORING CRITERIA (0-5 scale):

1. SPECIFICITY (0-1.5 points):
  - 0: Vague or generic statements ("things are slow", "we have problems")
  - 0.5: General category mentioned ("customer service issues")
  - 1: Specific task/process named ("responding to customer emails takes too long")
  - 1.5: Specific task with context ("Our 3-person team spends 2+ hours daily on customer email triage")
  
2. QUANTIFICATION (0-1.5 points):
  - 0: No numbers or metrics
  - 0.5: Vague quantities ("a lot", "too much")
  - 1: Rough estimates ("about 10 hours per week")
  - 1.5: Specific metrics ("We process 150 invoices monthly, each taking 8 minutes")
  
3. AUTOMATION FIT (0-1 point):
  - 0: Described tasks are highly creative/strategic (not good AI fit)
  - 0.5: Mixed tasks with some automation potential
  - 1: Clearly repetitive, rule-based, or data-processing tasks (excellent AI fit)
  
4. CLARITY (0-1 point):
  - 0: Confusing or contradictory description
  - 0.5: Understandable but missing key details
  - 1: Clear, well-articulated description

OUTPUT FORMAT:

```
{
  "specificity_score": number,
  "specificity_rationale": "string",
  "quantification_score": number,
  "quantification_rationale": "string",
  "automation_fit_score": number,
  "automation_fit_rationale": "string",
  "clarity_score": number,
  "clarity_rationale": "string",
  "total_score": number,
  "identified_opportunities": ["string array of specific AI use cases"],
  "recommended_tools": ["string array of tool categories"]
},
```

**userPromptTemplate:** `Analyze this business process description:

INDUSTRY: {{industry}}  
 COMPANY SIZE: {{employees}} employees  
 RESPONSE: "{{freeTextResponse}}"

Provide your analysis in the specified JSON format.  
};

```
// Score mapping for roadmap generation
const freeFormQualityMapping = {
  0: "No actionable processes described",
  1.5: "Basic awareness of inefficiencies",
  3: "Specific, addressable pain points identified",
  4.5: "Detailed processes with clear automation opportunities",
  5: "Comprehensive, quantified processes ready for immediate AI implementation"
};
```

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## Section 4: Budget & Resources

**Purpose:** Determine implementation feasibility

**Weight:** 15% of total score (15 points max)

**Estimated Time:** 2 minutes

### Questions

ID	Question	Type	Options	Required	Points
BR-01	What is your monthly budget for software/technology tools?	Single Select	Under \$100, \$100-\$500, \$500-\$1,000, \$1,000-\$2,500, \$2,500+, Don't know, Don't have one	Yes	1-5
BR-02	Do you have IT support available?	Single Select	In-house IT staff, Contracted IT support, Tech-savvy employee handles it, No dedicated IT support	Yes	1-4
BR-03	How have you typically implemented new technology in the past?	Single Select	Self-service/DIY, Hire consultants, Vendor-provided training, Avoid new technology, Never had to	Yes	1-3

BR	Are you actively budgeting for AI implementation initiatives over the next 12 months?	Free Text / Yes-No + Details	Open response	No	AI Analyzed
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## Scoring Logic for Section 4

javascript

```
const budgetResourcesScoring = {
    // BR-01: Monthly Technology Budget (Max: 5 points)
    // UPDATED: Minimum score of 1
    monthlyTechBudget: {
        "Under $100": 1,
        "$100-$500": 2,
        "$500-$1,000": 3,
        "$1,000-$2,500": 4,
        "$2,500+": 5,
        "Don't know": 2.5,
        "Don't have one": 1.5
    },
    // BR-02: IT Support Availability (Max: 4 points)
    itSupportAvailability: {
        "No dedicated IT support": 1,
        "Tech-savvy employee handles it": 2,
        "Contracted IT support": 3,
        "In-house IT staff": 4
    },
    // BR-03: Implementation Approach (Max: 3 points)
    // UPDATED: Minimum score of 1
    implementationApproach: {
        "Avoid new technology": 1,
        "Never had to": 1.5,
        "Self-service/DIY": 2,
        "Vendor-provided training": 3,
        "Hire consultants": 3
    },
    // Revenue contributes here (from BP-04): Max 3 points
    // See Section 1 for revenue scoring
};

function calculateBudgetResourcesScore(responses, revenueScore) {
```

```

let total = 0;
total += budgetResourcesScoring.monthlyTechBudget[responses.BR01];
total += budgetResourcesScoring.itSupportAvailability[responses.BR02];
total += budgetResourcesScoring.implementationApproach[responses.BR03];
total += revenueScore; // From Section 1 (BP-04)
return total; // Max: 15 points
}

```

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## Section 5: AI Knowledge & Expectations

**Purpose:** Gauge current AI familiarity and readiness mindset

**Weight:** 15% of total score (15 points max)

**Estimated Time:** 2-3 minutes

### Questions

ID	Question	Type	Options	Required	Points
AK-01	How familiar are you and your team with AI tools like ChatGPT, Claude, AI Agents, Automation Software, etc.?	Single Select	Never used them, Experimented briefly, Use occasionally, Use regularly, Power user	Yes	1-4
AK-02	Have you or your team used any AI-powered tools?	Multi-Select	ChatGPT/Claude, AI writing assistants, AI image generators, Chatbots, Automated scheduling, Predictive analytics, None, Other	Yes	1-3
AK-03	What is your primary goal for adopting AI?	Single Select	Reduce costs, Save time, Improve customer experience, Scale operations, Stay competitive, Explore possibilities	Yes	N/A*

AK -04	What concerns do you have about adopting AI?	Multi-select	Cost, Complexity, Data privacy, Job displacement, Reliability, Customer perception, None, Other	Yes	1-4
AK -05	How motivated are you as a business owner to implement AI?	Scale 1-5	1 = Very hesitant, 5 = Very eager	Yes	1-4
AK -06	How supportive/receptive do you believe your staff will be to AI adoption?	Scale 1-5	1 = Resistant, 5 = Enthusiastic	Yes	1-3

\*Used for recommendation personalization

## Scoring Logic for Section 5

```
javascript
const aiKnowledgeScoring = {
  // AK-01: AI Technology Familiarity (Max: 4 points)
  // UPDATED: Minimum score of 1
  aiFamiliarity: {
    "Never used them": 1,
    "Experimented briefly": 1.5,
    "Use occasionally": 2.5,
    "Use regularly": 3.5,
    "Power user": 4
  },
  // AK-02: AI Tools Previously Used (Max: 3 points)
  // UPDATED: Minimum score of 1
  aiToolsUsed: function(selectedTools) {
    const validTools = selectedTools.filter(t => t !== "None" && t !== "Other");
    if (validTools.length === 0) return 1;
    if (validTools.length <= 2) return 1.5;
    if (validTools.length <= 4) return 2.5;
    return 3; // 5+
  },
  // AK-04: Concern Level Assessment (Max: 4 points)
  // UPDATED: Rewards thoughtful concerns (1-2) over zero concerns
  // Zero concerns may indicate naivety rather than readiness
  concernLevel: function(selectedConcerns) {
    const count = selectedConcerns.filter(c => c !== "None").length;
    if (count === 0) return 3; // No concerns - possibly uninformed
  }
};
```

```

if (count === 1) return 4; // Thoughtful, focused concern - BEST
if (count === 2) return 3.5; // Realistic awareness
if (count === 3) return 2.5; // Multiple concerns but manageable
if (count >= 4) return 1.5; // Many concerns - needs education
return 1;
},

// AK-05: Personal Motivation (Max: 4 points)
personalMotivation: function(rating) {
  if (rating <= 2) return 1;
  if (rating === 3) return 2;
  if (rating === 4) return 3;
  return 4; // 5
},

// AK-06: Staff Supportiveness (contributes to Org Readiness too)
// Max: 3 points for this dimension
// UPDATED: Minimum score of 1
staffSupportiveness: function(rating) {
  if (rating <= 2) return 1;
  if (rating === 3) return 2;
  if (rating === 4) return 2.5;
  return 3; // 5
};

function calculateAIKnowledgeScore(responses) {
  let total = 0;
  total += aiKnowledgeScoring.aiFamiliarity[responses.AK01];
  total += aiKnowledgeScoring.aiToolsUsed(responses.AK02);
  total += aiKnowledgeScoring.concernLevel(responses.AK04);
  total += aiKnowledgeScoring.personalMotivation(responses.AK05);
  // Note: AK-06 contributes to Organizational Readiness, not directly here
  return total; // Max: 15 points
}

```

---

## Section 6: Data & Compliance

**Purpose:** Evaluate data readiness and regulatory constraints

**Weight:** 15% of total score (15 points max)

**Estimated Time:** 2 minutes

## Questions

ID	Question	Type	Options	Required	Points
DC-01	How would you describe the quality of your business data?	Single Select	Scattered/inconsistent, Somewhat organized, Well-organized, Highly structured and clean, Don't know	Yes	1-5
DC-02	Does your business handle sensitive customer data?	Single Select	Yes - highly regulated (HIPAA, PCI, etc.), Yes - standard PII, Minimal customer data, No sensitive data, Not Sure	Yes	N/A*
DC-03	Are you subject to industry-specific regulations?	Single Select	Yes - strict compliance requirements, Yes - moderate requirements, Minimal regulations, Unsure	Yes	1-2
DC-04	Do you have a data backup system in place?	Single Select	Yes - automated cloud backup, Yes - manual backups, Partial backup system, No backup system	Yes	1-3
DC-05	Describe any compliance or data security concerns specific to your industry	Free Text	500 char limit	Conditional**	N/A

\*Used for risk assessment and recommendation filtering

\*\*Only shown if DC-02 = "Yes - highly regulated" or DC-03 = "Yes - strict compliance requirements"

## Question Dependencies (NEW)

```
javascript
const questionDependencies = {
  "DC-05": {
    showIf: (responses) => {
      return responses.DC02 === "Yes - highly regulated (HIPAA, PCI, etc.)" ||
        responses.DC03 === "Yes - strict compliance requirements";
```

```
        },
        skipMessage: "Based on your responses, compliance-specific details are not required."
    }
};
```

## Scoring Logic for Section 6

javascript

```
const dataComplianceScoring = {
    // DC-01: Data Quality Self-Assessment (Max: 5 points)
    // UPDATED: Minimum score of 1, added "Don't know"
    dataQuality: {
        "Scattered/inconsistent": 1,
        "Somewhat organized": 2,
        "Well-organized": 4,
        "Highly structured and clean": 5,
        "Don't know": 2
    },
    // DC-03: Compliance Awareness (Max: 2 points)
    // Having compliance requirements indicates maturity
    // UPDATED: Minimum score of 1
    complianceAwareness: {
        "Unsure": 1,
        "Minimal regulations": 1.5,
        "Yes - moderate requirements": 1.75,
        "Yes - strict compliance requirements": 2
    },
    // DC-04: Backup System Maturity (Max: 3 points)
    // UPDATED: Minimum score of 1
    backupMaturity: {
        "No backup system": 1,
        "Partial backup system": 1.5,
        "Yes - manual backups": 2.5,
        "Yes - automated cloud backup": 3
    },
    // Data Volume from Section 1 (BP-02 + BP-03): Max 5 points
    // See calculateDataVolumeScore() in Section 1
};

function calculateDataReadinessScore(responses, dataVolumeScore) {
    let total = 0;
```

```

total += dataComplianceScoring.dataQuality[responses.DC01];
total += dataComplianceScoring.complianceAwareness[responses.DC03];
total += dataComplianceScoring.backupMaturity[responses.DC04];
total += dataVolumeScore; // From Section 1
return total; // Max: 15 points
}

```

---

## Section 7: Goals & Timeline

**Purpose:** Align recommendations with user expectations and urgency

**Weight:** 10% of total score (10 points max)

**Estimated Time:** 2-3 minutes

### Questions

ID	Question	Type	Options	Required	Points
GT-01	When would you ideally like to start implementing AI tools?	Single Select	Immediately, Within 3 months, Within 6 months, Within 1 year, No specific timeline	Yes	1-3
GT-02	What level of involvement do you want in the implementation process?	Single Select	Hands-on (DIY), Guided with support, Fully managed by experts, Minimal involvement	Yes	N/A*
GT-03	How would you measure AI implementation success?	Multi-Select	Time saved, Cost reduction, Revenue increase, Customer satisfaction, Employee productivity, All of the above	Yes	1.5-2.5
GT-04	What does successful AI adoption look like for your business in 1 year?	Free Text	500 char limit	Yes	AI: 1-4.5
GT-05	Is there anything else about your business situation we should know?	Free Text	1000 char limit	No	N/A

\*Used for service offering personalization

## Scoring Logic for Section 7

```
javascript
const goalsTimelineScoring = {
    // GT-01: Implementation Timeline (Max: 3 points)
    // UPDATED: Minimum score of 1
    implementationTimeline: {
        "No specific timeline": 1,
        "Within 1 year": 1.5,
        "Within 6 months": 2,
        "Within 3 months": 2.5,
        "Immediately": 3
    },
    // GT-03: Success Metrics Clarity (Max: 2.5 points)
    successMetricsClarity: function(selectedMetrics) {
        if (selectedMetrics.includes("All of the above")) return 2.5;
        const count = selectedMetrics.length;
        if (count === 1) return 1.5;
        if (count >= 2) return 2;
        return 1;
    },
    // GT-04: Goal Clarity (AI Analyzed) (Max: 4.5 points)
    // UPDATED: Minimum score of 1
    goalClarity: {
        "Vague or no goals stated": 1,
        "General goals without specifics": 2,
        "Specific, measurable goals": 3.5,
        "SMART goals with clear ROI expectations": 4.5
    }
};
```

## AI Analysis Prompt for Goal Clarity (GT-04)

### NEW SECTION: Detailed prompt for AI evaluation

```
javascript
const goalAnalysisPrompt = {
    systemPrompt: `You are an AI analyst evaluating business goal statements for AI adoption
readiness.
Your task is to assess how well-defined the user's AI adoption goals are using SMART criteria.
```

## SCORING CRITERIA:

### 1. SPECIFIC (0-1 point):

- 0: Vague goal ("improve things", "be more efficient")
- 0.5: General direction ("reduce customer wait times")
- 1: Specific target ("reduce customer email response time from 24h to 4h")

### 2. MEASURABLE (0-1 point):

- 0: No metrics mentioned
- 0.5: Qualitative measures ("better", "faster")
- 1: Quantitative metrics ("reduce by 30%", "save 10 hours/week")

### 3. ACHIEVABLE (0-1 point):

- 0: Unrealistic for their business size/resources (requires context)
- 0.5: Ambitious but possible with significant effort
- 1: Realistic given their stated resources and timeline

### 4. RELEVANT (0-0.5 points):

- 0: Goal doesn't align with stated pain points
- 0.5: Goal clearly addresses their business challenges

### 5. TIME-BOUND (0-1 point):

- 0: No timeframe mentioned
- 0.5: Vague timeframe ("soon", "eventually")
- 1: Specific timeframe ("within 6 months", "by Q2 2025")

## OUTPUT FORMAT:

```
{  
    "specific_score": number,  
    "specific_rationale": "string",  
    "measurable_score": number,  
    "measurable_rationale": "string",  
    "achievable_score": number,  
    "achievable_rationale": "string",  
    "relevant_score": number,  
    "relevant_rationale": "string",  
    "timebound_score": number,  
    "timebound_rationale": "string",  
    "total_score": number,  
    "goal_summary": "One sentence summary of their goal",  
    "recommended_milestones": ["90-day milestone", "180-day milestone", "365-day milestone"]  
},
```

```
userPromptTemplate: `Analyze this AI adoption goal statement:
```

```
INDUSTRY: {{industry}}
COMPANY SIZE: {{employees}} employees
STATED PAIN POINTS: {{painPoints}}
BUDGET RANGE: {{budget}}
TIMELINE PREFERENCE: {{timeline}}
```

```
GOAL STATEMENT: "{{goalStatement}}"
```

```
Provide your SMART analysis in the specified JSON format.`
```

```
};
```

```
function calculateGoalClarityScore(aiAnalysisResult) {
    // Map AI analysis total (0-4.5) directly
    // Minimum score of 1 applied
    return Math.max(1, aiAnalysisResult.total_score);
}
```

---

## Cross-Dimensional Validation Rules (NEW SECTION)

**Purpose:** Identify score combinations that indicate specific risks or opportunities requiring adjusted recommendations.

```
javascript
const crossDimensionalValidation = {

    // Rule 1: High enthusiasm + Low infrastructure = Risk of disappointment
    enthusiasmInfrastructureMismatch: {
        condition: (scores, responses) => {
            const highEnthusiasm = responses.AK05 >= 4 && responses.GT01 === "Immediately";
            const lowInfrastructure = scores.techInfrastructure.normalized < 40;
            return highEnthusiasm && lowInfrastructure;
        },
        flag: "EXPECTATION_MANAGEMENT",
        severity: "WARNING",
        message: "High enthusiasm detected with limited technology foundation. Recommend starting with infrastructure basics before AI implementation.",
        roadmapAdjustment: {

```

```

    addPhase: "Foundation Building",
    phaseDuration: "60-90 days",
    delayAllImplementation: true,
    recommendedFirstSteps: [
      "Cloud tool migration",
      "Data organization",
      "Basic automation (Zapier/Make)"
    ]
  }
},
};

// Rule 2: High budget + No IT support = Needs managed services
budgetSupportMismatch: {
  condition: (scores, responses) => {
    const highBudget = ["$1,000-$2,500", "$2,500+"].includes(responses.BR01);
    const noITSupport = responses.BR02 === "No dedicated IT support";
    return highBudget && noITSupport;
  },
  flag: "MANAGED_SERVICES_CANDIDATE",
  severity: "INFO",
  message: "Budget available but no IT support. Strong candidate for fully managed AI implementation services.",
  roadmapAdjustment: {
    emphasizeService: "Fully Managed Implementation",
    deemphasizeService: "DIY/Self-Service",
    recommendVendorSupport: true
  }
},
};

// Rule 3: Immediate timeline + Foundation-level readiness = Needs reality check
timelineReadinessMismatch: {
  condition: (scores, responses) => {
    const immediateTimeline = ["Immediately", "Within 3 months"].includes(responses.GT01);
    const foundationLevel = scores.overall < 35;
    return immediateTimeline && foundationLevel;
  },
  flag: "TIMELINE_ADJUSTMENT",
  severity: "WARNING",
  message: "Aggressive timeline with foundational readiness level. Recommend extending timeline and setting intermediate milestones.",
  roadmapAdjustment: {
    recommendedTimeline: "6-12 months",
    addMilestones: [
      "30 days: Data audit and organization",

```

```

    "60 days: Cloud tool adoption",
    "90 days: First automation pilot",
    "180 days: First AI tool implementation"
  ],
},
},
};

// Rule 4: High data quality + Low AI knowledge = Quick win opportunity
dataKnowledgeGap: {
  condition: (scores, responses) => {
    const highDataQuality = scores.dataReadiness.normalized >= 70;
    const lowAIKnowledge = scores.aiKnowledge.normalized < 40;
    return highDataQuality && lowAIKnowledge;
  },
  flag: "QUICK_WIN OPPORTUNITY",
  severity: "POSITIVE",
  message: "Strong data foundation with AI knowledge gap. High potential for quick wins with user-friendly AI tools.",
  roadmapAdjustment: {
    emphasize: "Education + Simple Tools",
    recommendedTools: [
      "ChatGPT/Claude for business writing",
      "AI-powered CRM features",
      "Automated reporting tools"
    ],
    includeTraining: true
  }
},
};

// Rule 5: Regulated industry + Cutting-edge enthusiasm = Compliance-first approach
regulatedEnthusiasm: {
  condition: (scores, responses) => {
    const highlyRegulated = responses.DC02 === "Yes - highly regulated (HIPAA, PCI, etc.)";
    const strictCompliance = responses.DC03 === "Yes - strict compliance requirements";
    const highEnthusiasm = responses.AK05 >= 4;
    return (highlyRegulated || strictCompliance) && highEnthusiasm;
  },
  flag: "COMPLIANCE_FIRST",
  severity: "CAUTION",
  message: "Regulated industry with strong AI interest. Must prioritize compliance-approved AI solutions.",
  roadmapAdjustment: {
    addPhase: "Compliance Review",
    phaseDuration: "30-45 days",
  }
};

```

```

    recommendedTools: "Enterprise-grade, SOC2/HIPAA compliant only",
    excludeTools: ["Consumer AI tools", "Free-tier solutions"],
    requireVendorVetting: true
  }
},
};

// Rule 6: Large team + Low staff supportiveness = Change management focus
changeManagementNeeded: {
  condition: (scores, responses) => {
    const largeTeam = ["51-100", "100+"].includes(responses.BP02);
    const lowSupport = responses.AK06 <= 2;
    return largeTeam && lowSupport;
  },
  flag: "CHANGE_MANAGEMENT_CRITICAL",
  severity: "WARNING",
  message: "Larger organization with anticipated staff resistance. Change management must be central to implementation.",
  roadmapAdjustment: {
    addPhase: "Change Management Program",
    phaseDuration: "Ongoing",
    recommendedActions: [
      "Executive sponsorship communication",
      "Pilot team selection",
      "Success story documentation",
      "Phased rollout by department",
      "Feedback loops and iteration"
    ]
  }
};
};

// Function to run all validation rules
function runCrossDimensionalValidation(scores, responses) {
  const flags = [];

  for (const [ruleName, rule] of Object.entries(crossDimensionalValidation)) {
    if (rule.condition(scores, responses)) {
      flags.push({
        rule: ruleName,
        flag: rule.flag,
        severity: rule.severity,
        message: rule.message,
        adjustment: rule.roadmapAdjustment
      });
    }
  }
}

```

```
    }
}

return flags;
}
```

---

# Score Calculation Engine

## Overall Score Formula

```
javascript
function calculateOverallReadinessScore(allResponses) {
    // Calculate component scores
    const dataVolumeScore = calculateDataVolumeScore(
        allResponses.BP02,
        allResponses.BP03
    );
    const teamSizeScore = calculateTeamSizeScore(allResponses.BP02);
    const revenueScore = calculateRevenueScore(allResponses.BP04);

    const dimensions = {
        techInfrastructure: {
            score: calculateTechInfrastructureScore(allResponses),
            maxPoints: 20,
            weight: 0.20
        },
        processMaturity: {
            score: calculateProcessMaturityScore(allResponses),
            maxPoints: 15,
            weight: 0.15
        },
        dataReadiness: {
            score: calculateDataReadinessScore(allResponses, dataVolumeScore),
            maxPoints: 15,
            weight: 0.15
        },
        budgetResources: {
            score: calculateBudgetResourcesScore(allResponses, revenueScore),
            maxPoints: 15,
            weight: 0.15
        }
    };
}
```

```

    },
    aiKnowledge: {
      score: calculateAIKnowledgeScore(allResponses),
      maxPoints: 15,
      weight: 0.15
    },
    orgReadiness: {
      score: calculateOrgReadinessScore(allResponses, teamSizeScore),
      maxPoints: 10,
      weight: 0.10
    },
    strategicAlignment: {
      score: calculateStrategicAlignmentScore(allResponses),
      maxPoints: 10,
      weight: 0.10
    }
  );
}

let totalScore = 0;
for (const dim of Object.values(dimensions)) {
  dim.normalized = (dim.score / dim.maxPoints) * 100;
  totalScore += dim.normalized * dim.weight;
}

// Run cross-dimensional validation
const validationFlags = runCrossDimensionalValidation(
  { ...dimensions, overall: totalScore },
  allResponses
);

return {
  overallScore: Math.round(totalScore),
  dimensions: dimensions,
  validationFlags: validationFlags
};
}

// Organizational Readiness (combines multiple inputs)
function calculateOrgReadinessScore(responses, teamSizeScore) {
  let total = 0;
  total += teamSizeScore; // Max 3 from Section 1
  total += technologyInfrastructureScoring.teamSoftwareComfort(responses.TI05); // Max 3
  total += aiKnowledgeScoring.staffSupportiveness(responses.AK06); // Max 3
  // Bonus point for implementation experience
}

```

```

if (["Vendor-provided training", "Hire consultants"].includes(responses.BR03)) {
  total += 1;
}
return Math.min(total, 10); // Cap at 10
}

// Strategic Alignment Score
function calculateStrategicAlignmentScore(responses) {
  let total = 0;
  total += goalsTimelineScoring.implementationTimeline[responses.GT01];
  total += goalsTimelineScoring.successMetricsClarity(responses.GT03);
  // GT-04 score added after AI analysis
  return total; // Max: 10 points (after GT-04 AI score added)
}

```

## Dimension Score Summary

Dimension	Max Points	Weight	Key Inputs
Technology Infrastructure	20	20%	TI-01 to TI-05
Business Process Maturity	15	15%	PP-02, PP-04, PP-05
Data Readiness	15	15%	DC-01, DC-03, DC-04, BP-02+BP-03
Budget & Resources	15	15%	BR-01 to BR-03, BP-04
AI Knowledge & Mindset	15	15%	AK-01, AK-02, AK-04, AK-05
Organizational Readiness	10	10%	BP-02, TI-05, AK-06, BR-03
Strategic Alignment	10	10%	GT-01, GT-03, GT-04

---

## Readiness Level Definitions

### Score Bands & Badges

Score Range	Level	Badge	Color
-------------	-------	-------	-------

0-25	Foundation Building		Red
26-45	Early Stage		Orange
46-65	Developing		Yellow
66-80	Ready		Green
81-100	Advanced		Gold

## Level-Specific Profiles & Recommendations

### Foundation Building (0-25)

#### Profile Characteristics:

- Limited technology infrastructure
- Minimal data organization
- Low AI familiarity
- Budget constraints

#### Recommended Actions:

- Start with basic cloud tool adoption (Google Workspace, basic CRM)
- Focus on data organization and digitization
- Explore free AI tools for learning (ChatGPT free tier)
- Build foundational technology literacy

**Suggested First AI Tool:** Free-tier chatbot for FAQ automation or AI writing assistant

---

### Early Stage (26-45)

#### Profile Characteristics:

- Some cloud tools in place
- Recognizes automation opportunities
- Limited budget but willing to invest
- Team may need convincing

#### Recommended Actions:

- Consolidate existing tools and data

- Identify 1-2 high-impact, low-complexity AI use cases
- Start with no-code/low-code AI solutions
- Pilot AI tools with a small team champion

**Suggested First AI Tool:** AI email assistant, basic chatbot, or scheduling automation

---

## **Developing (46-65)**

### **Profile Characteristics:**

- Solid technology foundation
- Clear pain points identified
- Moderate budget available
- Organization open to change

### **Recommended Actions:**

- Implement department-specific AI solutions
- Develop AI usage policies and guidelines
- Invest in team training
- Track ROI metrics from initial implementations

**Suggested AI Tools:** CRM AI features, marketing automation, customer service chatbots, AI-powered analytics

---

## **Ready (66-80)**

### **Profile Characteristics:**

- Strong infrastructure
- Well-organized data
- Adequate budget and resources
- Leadership commitment
- Clear strategic goals

### **Recommended Actions:**

- Develop comprehensive AI adoption roadmap
- Implement multiple AI solutions across departments
- Consider custom AI solutions for unique needs
- Establish AI governance framework

**Suggested AI Tools:** Advanced CRM automation, predictive analytics, AI-powered inventory management, custom chatbots, workflow automation platforms

---

## Advanced (81-100)

### Profile Characteristics:

- Cutting-edge infrastructure
- Data-driven culture
- Strong budget allocation
- Experienced team
- Clear AI strategy

### Recommended Actions:

- Explore enterprise-level AI platforms
- Consider custom AI/ML model development
- Implement AI across entire value chain
- Become industry AI adoption leader

**Suggested AI Tools:** Enterprise AI platforms, custom ML models, AI-powered business intelligence, predictive maintenance, advanced process automation

---

# AI Adoption Roadmap Generation Specification (NEW SECTION)

## Purpose

This section defines how assessment responses are transformed into personalized AI Adoption Roadmaps.

## Roadmap Components

Component	Data Source	Output
Executive Summary	Overall score + Level + Industry	2-3 paragraph overview

Current State Analysis	All dimension scores	Strengths/gaps breakdown
Opportunity Identification	PP-01, PP-06, PP-07, Industry	Ranked list of AI use cases
Tool Recommendations	Pain points + Budget + Tech level	Specific tool suggestions with pricing
Implementation Phases	Timeline + Readiness level + Flags	90-day, 180-day, 365-day milestones
Resource Requirements	Budget + IT support + Team size	Budget, time, and personnel needs
Risk Mitigation	Validation flags + Concerns (AK-04)	Identified risks with mitigation strategies
Success Metrics	GT-03 + Industry benchmarks	KPIs with target values
ROI Projection	Industry + Pain points + Budget	Estimated time/cost savings

## Data-to-Roadmap Mapping

javascript

```
const roadmapDataMapping = {

  // SECTION 1: Executive Summary Generation
  executiveSummary: {
    inputs: ["overallScore", "level", "BP01_industry", "BP02_employees", "validationFlags"],
    promptTemplate: `Generate a 2-3 paragraph executive summary for an AI adoption roadmap.
  
```

BUSINESS PROFILE:

- Industry: {{industry}}
- Company Size: {{employees}} employees
- AI Readiness Score: {{score}}/100 ({{level}})

KEY FLAGS: {{flags}}

The summary should:

1. Acknowledge their current position positively
2. Highlight the biggest opportunity for AI impact
3. Set realistic expectations based on their readiness level
4. Create excitement without overpromising

```
Tone: Professional, encouraging, specific to their industry.`  
},  
  
// SECTION 2: Opportunity Identification  
opportunityIdentification: {  
    inputs: ["BP01_industry", "PP01_timeConsumingTasks", "PP06_challenges",  
"PP07_inefficientProcess", "BP05_businessModel"],  
    promptTemplate: `Based on the following business profile, identify and rank the top 5 AI implementation opportunities.  
  
INDUSTRY: {{industry}}  
BUSINESS MODEL: {{businessModel}}  
  
TIME-CONSUMING TASKS (ranked):  
{{timeConsumingTasks}}  
  
STATED CHALLENGES:  
{{challenges}}  
  
INEFFICIENT PROCESS DESCRIPTION:  
{{inefficientProcess}}  
  
For each opportunity, provide:  
1. Opportunity Name  
2. AI Solution Category (e.g., "Conversational AI", "Document Processing", "Predictive Analytics")  
3. Estimated Implementation Complexity (Low/Medium/High)  
4. Potential Impact (time saved, cost reduced, revenue enabled)  
5. Recommended Tool Category  
6. Why this matters for their specific business  
  
Rank opportunities by: (Impact * 0.6) + (Ease of Implementation * 0.4)`  
},  
  
// SECTION 3: Tool Recommendations  
toolRecommendations: {  
    inputs: ["opportunities", "BR01_budget", "TI01_techLevel", "TI03_currentSoftware",  
"DC02_sensitiveData"],  
    promptTemplate: `Recommend specific AI tools for the following opportunities.  
  
OPPORTUNITIES (ranked):  
{{opportunities}}
```

## CONSTRAINTS:

- Monthly Budget: {{budget}}
- Technical Sophistication: {{techLevel}}
- Current Software Stack: {{currentSoftware}}
- Data Sensitivity: {{sensitiveData}}

For each opportunity, recommend:

1. PRIMARY TOOL: Name, pricing tier, why it fits
2. ALTERNATIVE TOOL: Lower-cost or simpler alternative
3. INTEGRATION NOTES: How it connects to their existing stack
4. COMPLIANCE NOTES: If sensitive data, only recommend compliant solutions

Prioritize tools that:

- Integrate with their existing software
- Match their technical comfort level
- Fit within stated budget
- Have strong vendor support for their company size`

},

// SECTION 4: Implementation Phases

```
implementationPhases: {
  inputs: ["level", "GT01_timeline", "validationFlags", "opportunities", "toolRecommendations"],
  promptTemplate: `Create a phased implementation plan based on:
```

READINESS LEVEL: {{level}}

DESIRED TIMELINE: {{timeline}}

VALIDATION FLAGS: {{flags}}

TOP OPPORTUNITIES: {{opportunities}}

RECOMMENDED TOOLS: {{tools}}

Generate a roadmap with these phases:

PHASE 1: FOUNDATION (Days 1-30)

- Prerequisites to address
- Quick wins to build momentum
- Team preparation activities

PHASE 2: PILOT (Days 31-90)

- First AI implementation
- Success metrics to track
- Iteration approach

PHASE 3: EXPANSION (Days 91-180)

- Additional implementations

- Process optimization
- Team training expansion

#### PHASE 4: OPTIMIZATION (Days 181-365)

- Advanced implementations
- Custom solutions consideration
- Long-term strategy refinement

Adjust phases based on validation flags:

- If EXPECTATION\_MANAGEMENT: Extend Phase 1
- If COMPLIANCE\_FIRST: Add compliance review to Phase 1
- If CHANGE\_MANAGEMENT\_CRITICAL: Add change management to all phases`

},

*// SECTION 5: ROI Projection*

```
roiProjection: {
  inputs: ["BP01_industry", "BP02_employees", "BP04_revenue", "opportunities",
  "PP04_repetitiveness", "PP05_manualEntry"],
  promptTemplate: 'Generate ROI projections for AI implementation.'
```

#### BUSINESS CONTEXT:

- Industry: {{industry}}
- Employees: {{employees}}
- Revenue Range: {{revenue}}
- Task Repetitiveness: {{repetitiveness}}/5
- Manual Data Entry: {{manualEntry}}/5

#### TOP OPPORTUNITIES:

{{opportunities}}

Calculate for each opportunity:

##### 1. ESTIMATED HOURS SAVED PER WEEK

- Based on industry benchmarks
- Adjusted for company size

##### 2. ESTIMATED COST SAVINGS (ANNUAL)

- Labor cost savings (hours \* estimated hourly rate for their size)
- Error reduction value
- Opportunity cost recovery

##### 3. POTENTIAL REVENUE IMPACT

- Faster response times
- Increased capacity
- Improved customer satisfaction

#### 4. IMPLEMENTATION COST

- Tool costs (monthly/annual)
- Implementation time
- Training investment

#### 5. PAYBACK PERIOD

- Months to positive ROI

Be conservative in estimates. Use ranges rather than specific numbers.

Always note that actual results depend on implementation quality.

}

};

## Sample Roadmap Output Structure

### AI ADOPTION ROADMAP

[Company Name] | Generated [Date]

Based on Assessment Score: [X]/100 ([Level])

---

---

### EXECUTIVE SUMMARY

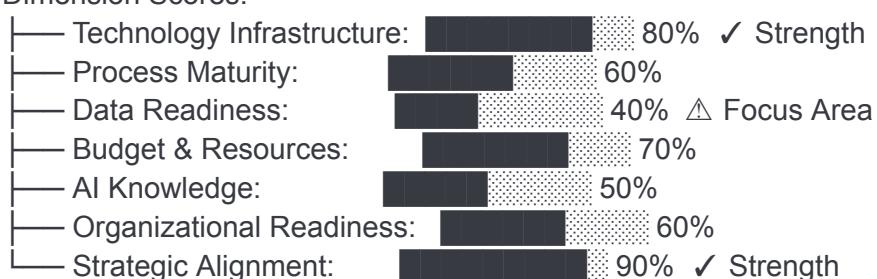
[2-3 paragraphs generated by AI]

---

---

### YOUR AI READINESS PROFILE

#### Dimension Scores:



#### △ FLAGS IDENTIFIED:

- [Flag 1 with explanation]
- [Flag 2 with explanation]

---

---

## TOP AI OPPORTUNITIES FOR YOUR BUSINESS

### 1. [Opportunity Name] - HIGH IMPACT

Solution: [Category]

Complexity: [Low/Med/High]

Potential: [Specific impact]

### 2. [Opportunity Name] - MEDIUM IMPACT

...

---

---

## RECOMMENDED TOOLS

For [Opportunity 1]:

PRIMARY: [Tool Name]

Pricing: [Tier/Cost]

Why: [Specific reason for this business]

Integration: [How it connects to their stack]

ALTERNATIVE: [Tool Name]

Pricing: [Tier/Cost]

Trade-off: [What they gain/lose]

---

---

## 90-DAY IMPLEMENTATION ROADMAP

### PHASE 1: FOUNDATION (Days 1-30)

[Action item 1]

[Action item 2]

[Action item 3]

Milestone: [What success looks like]

## PHASE 2: PILOT (Days 31-90)

- [Action item 1]
- [Action item 2]
- [Action item 3]

Milestone: [What success looks like]

---

---

## PROJECTED ROI

	Conservative	Realistic	Optimistic
Hours Saved/Week:	[X]	[Y]	[Z]
Annual Cost Savings:	\$[X]	\$[Y]	\$[Z]
Payback Period:	[X] months	[Y] months	[Z] months

### Assumptions:

- [Key assumption 1]
  - [Key assumption 2]
- 
- 

## NEXT STEPS

1. [Immediate action with link/CTA]
2. [Secondary action]
3. [Tertiary action]

Ready to get started? [Book a Discovery Call]

---

# Lead Capture Integration

## Gated Results Strategy

Assessment Complete!

Your AI Readiness Score:  72/100

 **Unlock Your Full Report**

Enter your details to receive:

- ✓ Complete dimension breakdown
- ✓ Personalized AI tool recommendations
- ✓ 90-day implementation roadmap
- ✓ ROI projection for your business

[Email Address]

[First Name]

[Company Name]

[Phone (optional)]

I'd like a free consultation call

[\[Get My Full Report →\]](#)

## Lead Data Captured

Field	Required	Purpose
Email Address	Yes	Primary contact, report delivery
First Name	Yes	Personalization
Company Name	Yes	CRM segmentation
Phone Number	No	Sales follow-up
Consultation Interest	Yes	Lead scoring/prioritization

## Lead Scoring Matrix

```
javascript
const leadScoringRules = {
    // Assessment-Based Scoring
    highReadinessScore: {
        condition: "readinessScore >= 66",
        points: 20,
        label: "Ready for implementation"
    },

    mediumReadinessScore: {
        condition: "readinessScore >= 46 && readinessScore < 66",
        points: 15,
        label: "Developing - needs guidance"
    },

    lowReadinessScore: {
        condition: "readinessScore < 46",
        points: 10,
        label: "Foundation building - education focus"
    },
}

// Budget Indicators
highBudget: {
    condition: "monthlyBudget >= '$1,000-$2,500",
    points: 15,
    label: "Strong budget capacity"
},
}

// Intent Signals
immediateTimeline: {
    condition: "timeline === 'Immediately' || timeline === 'Within 3 months'",
    points: 20,
    label: "High urgency"
},
}

consultationRequested: {
    condition: "consultationInterest === true",
    points: 25,
    label: "Explicit interest"
},
}

// Engagement Depth
completedDeepDive: {
    condition: "assessmentType === 'Deep Dive'"
```

```

    points: 10,
    label: "Highly engaged"
  },

// Cross-Dimensional Flags (NEW)
managedServicesCandidate: {
  condition: "validationFlags.includes('MANAGED_SERVICES_CANDIDATE')",
  points: 15,
  label: "High-value service opportunity"
},
}

quickWinOpportunity: {
  condition: "validationFlags.includes('QUICK_WIN_OPPORTUNITY')",
  points: 10,
  label: "Easy conversion potential"
}
};

// Lead Priority Tiers
const leadTiers = {
  hot: { minScore: 70, action: "Immediate sales outreach (within 24 hours)" },
  warm: { minScore: 45, action: "Nurture sequence + follow-up call (within 72 hours)" },
  cool: { minScore: 20, action: "Educational nurture sequence" }
};

```

---

# Technical Requirements

## Frontend Requirements

Requirement	Specification
Framework	React.js or Next.js
Responsive Design	Mobile-first, all breakpoints
Progress Indicator	Visual progress bar with section names
Form Validation	Real-time validation with helpful error messages
Accessibility	WCAG 2.1 AA compliant

Load Time	<3 seconds initial load
Save Progress	Auto-save to localStorage
Question Dependencies	Conditional display based on previous answers

## Backend Requirements

Requirement	Specification
Webhooks	N8N
Database	N8N data tables, PostgreSQL for responses, Redis for sessions
AI Processing	Integration with Claude API for free-form analysis and roadmap generation
Email Service	SendGrid or similar for report delivery
CRM Integration	HubSpot, Salesforce, or Pipedrive webhooks
Analytics	Event tracking for completion funnel
PDF Generation	For downloadable roadmap reports

## Security & Privacy

Requirement	Specification
Data Encryption	TLS 1.3 in transit, AES-256 at rest
GDPR Compliance	Consent checkboxes, data deletion capability
Data Retention	2 years standard, configurable
AI Data Handling	No training on user data, session-based processing

---

## User Experience Flow

LANDING PAGE  
"Discover Your Business's AI Readiness in 10 Minutes"  
[Start Assessment →]



ASSESSMENT DEPTH SELECTION  
Quick (5 min) | Standard (12 min) | Deep Dive (20 min)



PROGRESSIVE ASSESSMENT  
Section 1 → 2 → 3 → 4 → 5 → 6 → 7  
[Progress Bar:  47%]  
\* Conditional questions appear based on previous answers  
\* Auto-save every 30 seconds  
\* "Don't know" options available where appropriate



SCORE REVEAL + LEAD CAPTURE  
"Your Score: 72/100 Ready"  
[Enter email for full report]



FULL REPORT DELIVERY  
• On-screen results  
• Email PDF report

- AI-Generated Roadmap
- CTA to book discovery call

## Analytics & Tracking Events

Event	Trigger	Data Captured
assessment_started	User begins assessment	Assessment type, source
section_completed	Each section finished	Section ID, time spent
question_answered	Each question response	Question ID, answer, time
question_skipped	Conditional skip	Question ID, skip reason
assessment_abandoned	User leaves before completion	Last section, drop-off point
assessment_completed	Final question answered	Total time, all responses
lead_captured	Email submitted	Lead data, score
report_viewed	User views full report	Sections viewed
roadmap_downloaded	PDF download	Format, timestamp
cta_clicked	User clicks consultation CTA	CTA type

## Success Criteria

Metric	Target	Measurement
Completion Rate	>70%	Users completing / Users starting
Lead Capture Rate	>85%	Leads captured / Assessments completed

Time to Complete	<15 min (Standard)	Median completion time
NPS Score	>50	Post-assessment survey
Lead-to-Opportunity Rate	>15%	Within 90 days
Roadmap Engagement	>60%	Users who open/download roadmap

---

## Appendix A: Complete Question Reference

### Quick Start Questions (7 Essential)

- BP-02: Employee count
- TI-01: Technology adoption level
- TI-02: Cloud software usage
- PP-04: Task repetitiveness
- AK-01: AI familiarity
- AK-05: Personal AI motivation
- GT-01: Implementation timeline

### Standard Assessment Additions (+11)

- BP-01: Industry
- BP-04: Annual revenue
- TI-03: Current software stack
- TI-04: Data storage method
- PP-02: Customer support channels
- PP-06: Top 3 tech-solvable challenges
- BR-01: Monthly tech budget
- BR-02: IT support availability
- AK-04: AI concerns
- DC-01: Data quality
- GT-03: Success metrics

### Deep Dive Additions (+15)

- BP-03: Years in business
- BP-05: Business model description

- BP-06: Business goals (6/12/18 months)
  - TI-05: Team software comfort
  - TI-06: Technology frustrations
  - PP-01: Time-consuming tasks
  - PP-03: Biggest operational challenge
  - PP-05: Manual data entry time
  - PP-07: Inefficient workflow description
  - BR-03: Past implementation approach
  - BR-04: AI budget planning
  - AK-02: AI tools used
  - AK-03: Primary AI adoption goal
  - AK-06: Staff AI supportiveness
  - DC-02: Sensitive data handling
  - DC-03: Industry regulations
  - DC-04: Backup system
  - DC-05: Compliance concerns (conditional)
  - GT-02: Implementation involvement preference
  - GT-04: 1-year success vision
  - GT-05: Additional context
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## Appendix B: Version 2.0 Change Log

Change	Section	Rationale
Revised Team Size Scoring	Section 1	Changed from "smaller = better" to bell curve. Mid-sized teams (6-50) score highest as they have resources without enterprise complexity.
Revised Concern Level Scoring	Section 5 (AK-04)	Zero concerns now scores lower than 1-2 concerns. Having thoughtful concerns indicates informed awareness rather than naivety.
Added Cross-Dimensional Validation	New Section	Six validation rules identify mismatches that require adjusted recommendations (e.g., high enthusiasm + low infrastructure).
Specified AI Analysis Prompts	Sections 3, 7	Detailed prompts for evaluating free-text responses (PP-06, PP-07, GT-04) with specific scoring rubrics.
Added Roadmap Generation Spec	New Section	Complete specification for how assessment data maps to roadmap components, including prompt templates.

Added "Don't know" Options	Multiple	BP-04, TI-01, TI-04, DC-01 now include "Don't know" options with neutral scores.
Implemented Question Dependencies	Section 6	DC-05 only appears if user indicates regulated industry or sensitive data.
Adjusted Minimum Scores	All Sections	Changed minimum scores from 0 to 1 to avoid punitive scoring and improve mathematical consistency.
Enhanced Lead Scoring	Lead Capture	Added scoring for cross-dimensional flags (managed services candidate, quick win opportunity).
Added Sample Roadmap Structure	Roadmap Spec	Visual template showing final roadmap output format.

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## Appendix C: Dimension-Specific Recommendations Matrix

Dimension	If LOW (0-40%)	If MEDIUM (41-70%)	If HIGH (71-100%)
Tech Infrastructure	Invest in cloud basics first	Integrate existing tools	Ready for advanced AI
Process Maturity	Document workflows	Standardize processes	Automate immediately
Data Readiness	Digitize and organize	Clean and consolidate	Deploy data-hungry AI
Budget	Start with free tools	Subscription-based AI viable	Custom solutions
AI Knowledge	Education priority	Guided implementation	Self-directed adoption
Org Readiness	Change management focus	Pilot programs	Full rollout
Strategic Alignment	Define goals first	Refine metrics	Execute roadmap

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*End of Document*

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