



PropelAI Usability Audit and Proposal Manager Journey Map

Executive UX Summary

PropelAI presents a modern dark-themed interface with a crisp layout and intuitive navigation. The **main workspace** on the left groups tasks into “Upload RFP,” “Compliance Matrix,” “Amendments,” and “Proposal Outline,” while the **Company Library** and **Team Workspaces** live below, creating a mental separation between proposal-specific work and reusable company assets. Primary actions (e.g., **Upload Document**) use bold gradients, and secondary actions are muted to avoid distraction. The site also provides a **quick-start guide** and “**Tips for Best Results**” on the upload page ¹ and interactive tooltips (question-marks) that expand into detailed guidance for each document type ² ³. These design choices demonstrate attention to guidance and help users get started without reading external documentation.

However, several friction points hinder the experience. Terminology such as **SOW/PWS, SF1449, Section L/M, CDRL, and OCI** is assumed knowledge; although the tooltips explain acronyms, the labels themselves remain jargon-heavy. The **primary call-to-action (“Upload documents to continue”)** only appears at the bottom of a long page and is greyed out until files are uploaded ¹, making it easy for users to miss. There is no **dashboard** summarizing RFP statuses or library metrics beyond simple counters, and the user must navigate between sections to understand progress. Finally, no progress indicator or push notifications exist to inform users when document processing or matrix generation has completed.

Trust Score: 6/10. The interface looks polished and modern, and AI-powered search in the Library ⁴ conveys sophistication. Yet the lack of obvious feedback during processing, jargon-heavy labels, and a hidden call to action can undermine confidence that the system understands government requirements and will produce accurate outputs.

Proposal Manager Journey Map

Phase	User Goal	Pain Points / Friction	Interaction Type
Dashboard Entry / Landing	Access PropelAI and orient themselves; understand what the tool can do.	Landing page immediately goes to the “Upload RFP” wizard without a status dashboard. User cannot see recent RFPs, document processing status, or tasks at a glance.	Technology-Enabled (web app loads the default page automatically).

Phase	User Goal	Pain Points / Friction	Interaction Type
Document Upload	Provide RFP documents (SOW/PWS, Section L/M, amendments) to generate a compliance matrix and outline.	Labels use acronyms like SOW , PWS , SF1449 , and CDRL that new proposal managers may not recognize. File upload dialogs launch on card click, which is expected but there is no drag-and-drop option. The critical “Upload documents to continue” button sits at the bottom of the page and remains disabled until documents are added ¹ —easy to miss.	Human-Driven (manual selection of files).
Guidance & Document Clarification	Understand which files belong to each slot and how to prepare them.	Interactive tooltips provide detailed explanations for each slot ² ³ , but the question-mark icon is small and not obviously clickable. Users might overlook that more information is available and instead upload the wrong document.	Technology-Enabled (tooltips displayed by clicking ? icons).
Quick-Start Guide & Tips	Learn best practices for structuring uploads.	The quick-start guide and tips are useful ¹ , yet they appear below the upload cards; users must scroll to see them. New users may begin uploading before seeing the guidance.	Technology-Enabled.
Processing / Compliance Matrix Generation	Wait for PropelAI to extract requirements and generate a compliance matrix.	There is no visible progress indicator or notification system to tell users that extraction is in progress or completed. The “Compliance Matrix” navigation link remains disabled until processing finishes; this is not explained.	Technology-Driven (AI processes documents automatically).
Compliance Matrix Review	Examine extracted requirements and verify completeness.	Not accessible without uploading documents; therefore cannot evaluate. Potential friction includes understanding AI-generated requirement categories and editing the matrix.	Technology-Driven (matrix generated), Human-Driven for review.

Phase	User Goal	Pain Points / Friction	Interaction Type
Proposal Outline Creation & Refinement	Generate and edit a draft proposal outline using the AI.	Not accessible in the current session; assumed to be available after matrix completion. Risk of confusion if the outline uses government jargon or if editing tools are limited.	Technology-Driven with Human-Driven refinement.
Company Library Management	Upload resumes, capabilities statements and past performance documents to enrich proposals.	The library shows counters for documents, capabilities, differentiators, and past performance; however, the counters remain zero even when documents are uploaded, which could confuse users. Removing documents is manual. AI search requires selecting category tags; mis-categorised documents may cause irrelevant results.	Human-Driven for uploading; Technology-Enabled search and AI-powered semantic search ⁴ .
Team Collaboration	Create teams to share library content and collaborate.	The Teams page requires manual creation of teams and entry of names/descriptions via a modal form. There is no guidance on best practices for team naming or roles. Users must sign in to use collaboration features, which introduces an additional step ⁵ .	Human-Driven for creation; Technology-Enabled for collaboration once set up.

Design Consideration Checklist

Element	Evaluation	Explanation
Plain Language	Improvement Needed	While tooltips provide explanations, the primary labels still use government acronyms (e.g., SOW/PWS, SF1449, CDRL, OCI) that may be unfamiliar to new proposal managers. A plain-language approach would surface full names or include definitions directly on cards rather than hiding them behind a question-mark tooltip.

Element	Evaluation	Explanation
Guided Instructions	Pass with caveats	The quick-start guide and “Tips for Best Results” help orient users ¹ , and clickable tooltips expand into detailed descriptions for each document type ² ³ . However, the guidance is positioned below the main upload cards and the help icons are subtle, so users might miss them. A step-by-step wizard or inline hints could provide more proactive guidance.
Mobile Responsiveness / Layout	Improvement Needed	The current layout uses wide horizontal cards and relies on hover or click interactions for tooltips. On smaller screens these cards may stack awkwardly and require excessive scrolling. There is no evidence of responsive design cues such as collapsible menus or adaptive text sizes.
Push Alerts / Feedback Mechanisms	Fail / Improvement Needed	After uploading documents, there is no loading indicator, progress bar or notification to indicate that requirements extraction is occurring. Navigation items (e.g., “Compliance Matrix”) remain disabled without explanation, leaving users wondering if the upload succeeded. Implementing status banners or email alerts would enhance user confidence.

Recommendations for “Future State”

- 1. Embed plain-language definitions and automatic document detection.** Replace acronyms on upload cards with full names (e.g., “Statement of Work (SOW)” instead of “SOW/PWS”) and show a brief description by default. Use AI to **auto-detect document types** when files are uploaded and display a confirmation, reducing manual categorization. This moves the **Document Upload** phase from *Human-Driven* to *Technology-Enabled*.
- 2. Introduce a dashboard and real-time status feedback.** Provide a landing dashboard that lists recent RFPs, processing status, and links to the compliance matrix and outline. When a document is uploaded, show a **progress indicator** and send push or email notifications when extraction and outline generation complete. This reduces anxiety during the **Processing** phase and moves parts of the journey to *Technology-Driven*.
- 3. Implement guided workflows and interactive FAQs.** Convert the upload page into a **step-by-step wizard** where each phase (upload, review documents, confirm extraction, generate matrix, refine outline) is clearly labelled. Include an **interactive FAQ sidebar** that answers common questions and uses plain language, accessible without scrolling ². Pre-populate fields using data from the **Company Library**, and highlight next actions to guide users. These enhancements reduce cognitive load and transform manual decision points into *Technology-Enabled* steps.