

BigFive SaaS

Complete Planning & Build Document Pack

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Includes: product, UX/UI, technical specs, analytics/marketing, ops, and legal drafts.

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01 - Product Brief

Last updated: 2025-12-28 **Owner:** Product

1. Problem & Opportunity

- Users want quick, credible personality insights with actionable advice (career/relationships).
- Market: personality/self-improvement; monetization via premium report (PDF).

2. Target Users (ICP)

- Primary: Women 18–34, self-help & career-curious, social media active.
- Secondary: Job seekers, students, couples.
- Geography: Global (EU focus).

3. Value Proposition

- Free accurate Big Five test + optional premium report in minutes.
- Shareable results & personalized advice.

4. Unique Selling Points (USPs)

- Evidence-based (IPIP-120), clean UX, instant premium PDF, privacy-first (GDPR).

5. Success Metrics (KPI)

- Quiz start rate, completion rate, paywall CTR, purchase rate, ARPU, CAC, refund rate.

6. Competitive Landscape

- Note top competitors and what we do better/different.

7. Constraints & Assumptions

- Payment via Paddle, Next.js 15 + Vercel, Supabase storage.

8. Risks & Mitigations

- Credibility → show sources & disclaimers.
- Fraud → webhook signature verify, price validation.
- Performance → edge caching, light bundle.

9. Scope v1 (MVP)

- Landing, Quiz (120), Free result, Paywall, Checkout, PDF, Email delivery.

10. Out of Scope (v1)

- Accounts/Teams, B2B dashboards, multi-language (later).

02 · User Flow (Landing → Quiz → Free → Paywall → PDF)

```
flowchart LR
    A[Landing] -->|CTA Start| B[Quiz 1/120]
    B --> C[Quiz 120/120]
    C --> D[Compute Scores]
    D --> E[Free Results Page]
    E -->|Unlock full report| F[Checkout (Paddle modal)]
    F -->|Paid| G[Webhook confirms]
    G --> H[Generate PDF]
    H --> I[Thank-you + Download Link + Email]
```

Edge-cases

- Reload mid-quiz → restore progress from local storage.
- Payment failure → retry, support link.
- PDF link expired → signed URL refresh endpoint.

States

- Anonymous → Buyer (email captured at checkout).

03 · Pricing & Packages

Price Points (A/B test)

- Starter PDF: €5 vs €9
- Add-on: Career Deep-Dive +€3 (post-purchase upsell)

What users get (Premium)

- Detailed OCEAN pages, personalized tips, bar chart, share image, resources.

Refund Policy (Draft)

- 7-day money-back if file not downloaded / technical issues. (Confirm legally.)

Experiments

- Price A/B (50/50), bundles vs single, coupons limited to campaigns.

KPIs

- Paywall CTR, Checkout conversion, ARPU, Refund %.

04 · Roadmap (90 days)

Phase 0 (Days 1–3)

- Finalize brief, ICP, value prop, pricing.

Phase 1 (Days 4–14)

- IPIP-120 import, scoring, content draft.

Phase 2 (Days 15–35)

- Next.js app, paywall, webhook, dummy PDF.

Phase 3 (Days 30–45)

- UI polish, share OG-image, accessibility.

Phase 4 (Days 40–70)

- Ads + content, analytics, A/B pricing.

Phase 5 (Days 60–90)

- PDF polish, upsell, SEO, legal review.

05 · Design System (Figma ↔ Tailwind)

Tokens

- Colors: brand (#5B7CFA), brand-foreground (FFFFFF), neutral-100 (#F5F5F5)
- Typography: Inter (base 16px, heading 32px semibold)
- Radius: md (8px), lg (12px), xl (16px)

Grid

- Desktop 1440, 12 columns, 24 gutter, 80 margins.

Components (shadcn/ui)

- Button, Progress, Radio Group, Dialog, Card, Input, Toast.

Assets

- Icons: Lucide set.
- OG-image templates per result.

06 · Wireframes & UI

Pages

1. Home: hero, proof, CTA. 2. Quiz: question panel, Likert 1–5, progress, next/back, autosave. 3. Result (Free): bar chart, short descriptions, CTA unlock. 4. Checkout: summary + Paddle modal. 5. Thank-you: download link + share + email resend.

Components

- Progress bar (h-2), Likert radio (1–5), Trait bar chart, Share buttons.

Accessibility

- Keyboard navigation, aria labels, color contrast AA.

07 · Content Spec

Sources

- IPIP-120 (open-source). Cite source and license in FAQ.

Voice & Tone

- Friendly, evidence-based, non-clinical.

Free Result Content

- Short paragraphs per trait (O,C,E,A,N) + guidance (2–3 bullets).

Premium PDF Content

- 300–400 words per trait, 2 personalized tips each (career & relationships).
- Resources: 1–2 book/article links per trait (non-promotional).

Email

- Receipt + download, reminder (24h), feedback request (3 days).

08 - Scoring Spec

Item Schema (JSON)

```
{ "id": "Q1", "trait": "O", "reverseKeyed": false, "weight": 1 }
```

Likert Mapping

- 1..5 → [-2,-1,0,1,2] (example) or use normalized 0..4 then z-score.

Per-Trait Score

- Sum weighted items per trait → normalize to 0–100.

Normalization

- $\text{percentile} = (\text{raw} - \text{min}) / (\text{max} - \text{min}) * 100$

Validation

- Missing answers → prompt to complete or impute neutral.

Test Fixtures

- Provide 3 sample answer sets with expected OCEAN outputs.

09 · Data Model & ERD

```
erDiagram
    users ||--o{ results : has
    users ||--o{ orders : has

    users {
        uuid id PK
        text email
        timestamp created_at
    }
    results {
        uuid id PK
        uuid user_id FK
        jsonb traits
        timestamp created_at
    }
    orders {
        uuid id PK
        uuid user_id FK
        text paddle_order_id
        text status
        integer amount_cents
        timestamp created_at
    }
```

Indexes

- users.email unique
- results.user_id, orders.user_id

RLS/ACL (if Supabase)

- results: owner read; orders: owner read.

10 · API & Server Actions

Server Actions

- `createOrder(payload)` → returns checkout params
- `createPdf(traits)` → returns signed URL

API Routes

- `POST /api/paddle` (webhook): verify signature, update order, trigger PDF.

Contracts (JSON)

`createOrder` (input)

```
{ "email": "user@example.com", "amountCents": 900, "currency": "EUR" }
```

`createOrder` (output)

```
{ "checkout": { "id": "..." } }
```

Errors

- 400 invalid payload, 401 signature fail, 409 duplicate webhook, 500 internal.

Rate-limit

- 20 req/min per IP (Upstash Redis suggested).

11 · Payments Playbook (Paddle)

Setup

- Vendor ID, Auth code, Public Key, Webhook secret.
- Sandbox first; switch to Live after test checklist.

Flow

1) User opens checkout modal and pays. 2) Paddle sends webhook `payment_succeeded` → verify signature. 3) Update order → generate PDF → email link.

Test Cases

- success, cancel, failed card, duplicate webhook, refund.

Fraud Controls

- Hard-code price server-side, verify currency, compare `order_id`.

Go-live

- Rotate keys, enable alerts, run real €1 test.

12 · PDF Report Spec

Layout

- A4, margins 24px, ≤ 700 kB target.
- Sections: cover, overview, chart, traits (5), tips, resources.

Variables

- {name}, {date}, {scores.O}, {scores.C}, {scores.E}, {scores.A}, {scores.N}

Tech

- HTML+CSS template → Puppeteer/Playwright → Buffer → Storage (signed URL 24h).

Accessibility

- Selectable text, embedded fonts (subset).

QA

- Open on mobile/desktop, file size, correct numeric values.

13 · Deployment & Environment

Environments

- Preview (per PR), Staging, Production.

Env Vars

- PADDLE_VENDOR_ID, PADDLE_VENDOR_AUTH_CODE, NEXT_PUBLIC_PADDLE_CLIENT_KEY
- SUPABASE_URL, SUPABASE_SERVICE_ROLE_KEY, NEXT_PUBLIC_SUPABASE_ANON_KEY
- NEXTAUTH_SECRET (if using NextAuth)

Branching

- `main` → prod; `develop` → staging; feature branches → previews.

Rollback

- Vercel one-click to prior deployment.

Alerts

- Usage (bandwidth/functions), errors, webhook failures.

14 · Security & Compliance (GDPR)

Data

- Collect: email (buyers), quiz answers (anonymous), order metadata.
- Store: EU region, encrypted at rest, TLS in transit.

GDPR

- Legal basis: consent (quiz), contract (purchase).
- DSR: export/delete endpoint; 30-day retention after delete request.
- DPA with processors (Vercel, Supabase, Paddle).

Controls

- Rate-limit, input validation (Zod), webhook signature verify.
- Signed URLs for PDF with short expiry, no open buckets.

Logging

- PII-minimized logs, redact secrets.

15 · Analytics Taxonomy (Plausible)

Events

- `quiz_view, quiz_start, quiz_25, quiz_50, quiz_75, quiz_complete`
- `paywall_view, checkout_open, purchase_success`

Properties (via UTM)

- `source, medium, campaign, ab_variant, device`

Funnels & Goals

- View→Start, Start→Complete, Complete→Paywall, Paywall→Paid.

Dashboards

- Daily conversions, ARPU, LTV approximation, CAC by channel.

16 · Marketing Plan

Channels

- TikTok/Reels (hooks), SEO articles, email.

Budget (initial)

- €1,500 ads/month, goal CAC < €2.5

Creative

- 10 hooks list, 5 ad scripts, 3 thumbnails.

Email Sequence (5)

- Welcome, Results tips, Career teaser, Social proof, Offer.

17 · SEO & Open Graph

Meta

- Title (≤ 60 chars), Description (≤ 155 chars), canonical URLs.

OG Images

- Dynamic `/og?o=78` etc., 1200×630, PNG/JPEG.

Sitemaps & Robots

- `/sitemap.xml`, `/robots.txt` allow public pages.

Internal Linking

- CTA from result to checkout; related resources.

18 · QA & Launch Checklist

Functional

- Quiz works, progress saves, edge cases handled.
- Webhook receives and verifies signature.
- PDF generated and downloadable, email sent.

Performance

- Lighthouse ≥ 90 , bundle size reasonable, no blocking assets.

SEO

- Meta + OG present, social share renders correctly.

Payments

- Sandbox: success/fail/refund tested; Live: €1 test.

Go/No-Go

- All critical checks pass → deploy production.

19 · Ops Runbook

Monitoring

- Uptime checks for `/health`, webhook 2xx rate, error logs.

Incident Response

- Severity levels (SEV1–SEV3), response time targets.

Backups

- DB daily, storage weekly; test restore monthly.

On-call

- Slack/Telegram alert channel, escalation matrix.

20 · Support Macros (Templates)

Refund (no download)

Hello, we see the report wasn't downloaded. We've issued a full refund. It can take 3–5 business days to appear.

PDF Link Expired

Your secure download link expired for safety. Here is a new 24h link: {{link}}

Delete My Data (GDPR)

We've deleted your data and sent a confirmation. If you need an export first, reply to this email.

General

Thanks for reaching out! We're here to help within 24h.

21 · Terms of Service (Draft)

Not legal advice. Have counsel review.

- 1. Agreement**
- 2. Services**
- 3. Accounts & Eligibility**
- 4. Purchases & Refunds**
- 5. Intellectual Property**
- 6. Acceptable Use**
- 7. Disclaimers (non-clinical)**
- 8. Limitation of Liability**
- 9. Governing Law & Disputes**
- 10. Contact**

22 · Privacy Policy (Draft)

Not legal advice. Have counsel review.

1. Data Controller & Contact

2. What We Collect

- Quiz answers (anonymous), email (buyers), payment metadata (via Paddle).

3. Purposes & Legal Bases

- Consent (quiz), Contract (purchase), Legitimate interest (analytics).

4. Sharing

- Processors: Vercel, Supabase, Paddle (DPAs).

5. International Transfers

6. Retention

7. Your Rights (EU/EEA)

- Access, Rectify, Delete, Portability, Object.

8. Security

9. Cookies & Tracking

10. Changes

23 · Cookie Policy (Draft)

Types of Cookies

- Essential (session), Analytics (Plausible), Marketing pixels.

Consent

- Banner with accept/decline, granular control for marketing.

Management

- How to change preferences, link to system settings.

24 · Disclaimer (Informational / Non-Clinical)

This service provides informational personality insights only. It is not a medical, psychological, or clinical evaluation, and should not be used to diagnose or treat any condition. For professional advice, consult a qualified specialist.

Users are responsible for their own decisions. We do not guarantee outcomes, and results may vary.