



# **Technical Document – Annexure I of AI Steering Committee**

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## Annexure I

### 1. Project Overview

The AI Steering Committee aims to bring the power of AI-driven advisory services to the fingertips of business leaders through a dedicated AI based consultancy portal. The platform will offer a seamless experience, allowing users to configure profiles, set up expert panels, and receive personalized advice, enhancing decision-making capabilities. Welcome to a new era of business management, where innovation, strategy, and growth are just a tap away.

#### ✓ **Objective**

The client is a business consultant, intends to scale his consultancy services by developing an artificial intelligence-backed application. The application aims to streamline and enhance strategic, financial, human resources, and marketing consultancy services.

#### ✓ **Methodology**

The client as a consultant will engage with the end-users to define project requirements during the initial physical visit(s). The collaboration will involve identifying needs and establishing an action plan involving four types of experts: strategic, financial, human resources, and marketing advisors. The client will provide each expert with a detailed action plan, specifying tasks and deadlines. The experts will engage with the end-users to gather the necessary information to complete their deliverables. The relationship between me, end-users, and experts will be bilateral. End-users can ask questions to the experts, and vice versa. The Client will re-enter the scene to suggest new actions in a continuous improvement plan.

## 2. Technologies

Development Phases		Tools & Technology
Requirement Gathering and Analysis	Proposal Drafting, SRS Writing and User Flow Diagram	Microsoft Office Word 2019 / Microsoft Office Presentation 2019 / Microsoft Office Vision 2019
	Wire Framing	Axure / UiZard
Development	Frontend	React.js
	Backend	Node.js, Express
	Database	Mongo DB
	AI frameworks	TensorFlow , PyTorch
	Security	SSL, OAuth2.0
	Hosting	AWS or Azure

## 3. Features and Scope of Work

**Client Profile:** Includes client information, industry, geographical area, company size, number of employees, and financial information.

**Expert Profiles:** Detailed resumes for each expert, outlining their qualifications, skills, and expertise.

**Document Repository:** Separate spaces for clients to upload information and experts to submit deliverables.

**Chat Functionality:** Individual chats for each expert, facilitating communication between experts and clients.

**Review Interface:** A section allowing the Client to review all chats and deliverables before final submission.

### ➤ Strategic Advisor:

Objective: To conduct an in-depth analysis of the client's company, considering various aspects such as partner identification, cost structure, resource needs, ideal client definition, customer segmentation, business lines, sales channels, and customer relations.

- **Deliverables:**

- Business Model Canvas: Comprehensive visual representation of the company's business model.

- Pestel Analysis: Examination of external factors affecting the business.
- SWOT Analysis: Assessment of internal strengths and weaknesses, external opportunities, and threats.
- Competitive Analysis: Evaluation of the competitive landscape.
- Strategic Plan: Development of a detailed plan outlining strategic goals and actions.

➤ **Financial Advisor:**

Objective: To provide comprehensive financial insights and support to the client.

- **Functions:**

- Monthly Closing: Ensure a smooth monthly closing process compared to the budget.
- KPI Definition: Collaborate with the client to define key performance indicators.
- Commercial Risk Reports: Generate reports assessing commercial risks.
- Credit Opinions: Provide opinions on the creditworthiness of clients.
- Investment Analysis: Conduct detailed analyses of potential investments.

- **Deliverables:**

- Reporting Package: Monthly reports including financial closing and KPIs.
- Risk Assessment: Reports evaluating commercial risks.
- Investment Selection: Analyses aiding in the selection of profitable investments.

➤ **Human Resources Advisor**

Objective: To optimize organizational processes and structure.

- **Functions:**

- Process Analysis: Evaluate and optimize existing processes.
- Roles and Responsibilities: Define clear roles and responsibilities for team members.
- Organizational Chart: Create and refine the organizational chart.

- Administrative Process Improvements: Propose improvements in administrative processes.
- Key Performance Indicators: Define KPIs for assessing organizational health.
- Organizational Structure Definition: Assist in defining an organizational structure tailored to the company's needs.

- **Deliverables:**

- Process Improvement Proposals.
- Updated Organizational Chart.
- Key Performance Indicator Definitions.
- Organizational Structure Recommendations.
- Job Descriptions

➤ **Marketing and Commercial Advisor**

Objective: To enhance the client's commercial and marketing strategies.

- **Commercial Functions:**

- Market Analysis: Evaluate market trends and competitive landscape.
- Commercial Strategy Development: Collaborate on effective sales and promotion strategies.
- Customer Segmentation: Identify and segment potential customers.
- Customer Management: Devise strategies for effective customer relationship management.
- Commercial Proposal Development: Assist in creating compelling commercial proposals.
- Negotiation: Participate in negotiations to secure favorable agreements.
- Sales Monitoring: Continuously monitor and analyze sales performance.
- Sales Team Training: Provide training to improve the performance of the sales team.
- Marketing Functions:

- Market Research: Conduct in-depth research on the market.
- Marketing Strategy Development: Create comprehensive marketing strategies.
- Audience Segmentation: Profile and segment the target audience.
- Brand Management: Develop and manage the company's brand identity.
- Advertising Campaigns: Plan and execute effective advertising campaigns.
- Digital Marketing Strategies: Implement strategies for online marketing.
- Analysis of Marketing Results: Evaluate the performance of marketing strategies.
- Customer Communication: Collaborate with the sales team for consistent customer communication.
- **Deliverables:**
  - Detailed Strategies Documentation.
  - Reports on Advertising Campaigns.
  - Digital Marketing Strategies.
  - Audience Segment Profiles.
  - Brand Management Guidelines.
  - Performance Analysis of Marketing Strategies

**The platform aims to empower business leaders by providing tailored advisory services through a personalized board of advisors. The key functionalities and features are outlined below:**

➤ **Domain-Specific AI Consultants:**

- Develop profiles for AI consultants, each specializing in a specific industry domain (e.g. Strategic Finance, HR, and Marketing).
- Create an onboarding process for AI consultants to show their expertise, and experience, and showcase successful projects.

- **Client Onboarding and Matching:**
  - Implement a client onboarding process to gather information about their industry, challenges, and goals.
- **AI Advisory Services:**
  - Design an interactive platform that allows clients to seek advice, discuss challenges, and request tailored solutions.
  - Implement a secure document exchange system for clients to share relevant data with their designated AI consultants
- **User Information Collection:**
  - The platform will collect basic information, professional background, and business details.
  - Users can provide personal interests, goals, preferences, skills, management style, and values, fostering a more personalized advisory experience.
- **Feedback and Continuous Improvement:**
  - Integrate a feedback system for clients to provide input on the effectiveness of AI recommendations and consultancy services.
- **Cross-Platform Compatibility:**
  - Develop a user-friendly interface accessible on both web and mobile platforms.
  - Ensure a consistent and optimized user experience across various devices.
- **Premium Features:**
  - Premium users will have access to active advisors who provide homework assignments, follow the action plan, and offer reviews.
  - Premium features enhance user engagement, offering a more intensive and proactive advisory experience.

**Here's how GPT-3.5 or any LLM Model could be utilized in various aspects of the application:**



➤ **AI Advisory Services:**

- Text-Based Consultations: GPT-3.5 can be used to understand and generate human-like responses to user queries related to advisory services. This helps in creating an interactive platform where users can seek advice and discuss challenges.

➤ **User Information Collection:**

- Natural Language Input: GPT-3.5 can assist in creating conversational interfaces for collecting user information in a more natural and user-friendly way.

➤ **Client Onboarding and Matching:**

**Matching Algorithm:**

- GPT-3.5 can contribute to the algorithm that matches clients with suitable AI consultants by understanding and processing user-profiles and consultant expertise through natural language interactions.

➤ **Feedback and Continuous Improvement:**

- Feedback Analysis: GPT-3.5 can assist in analyzing user feedback and understanding sentiments, providing valuable insights for continuous improvement.

➤ **Premium Features - Homework Assignments:**

- Homework Generation: GPT-3.5 can generate personalized homework assignments based on user goals and the advice given by AI consultants.

Building an AI-based consultancy portal is a complex task that requires a multidisciplinary team with expertise in various areas. The team roles, functions, and average hourly costs are approximate values and can vary based on location, experience, and other factors.

## 4. Project Management

Before Project is awarded			
Business Analysis	Project Management / Software Development	Business Development / Sales	Accounting
1. Project Identify / Analysis  2. Develop one-page proposal overview  3. Create project management overview  4. ALVAR VILALLONGA assigned to business manager GBM  <i>GBM: Global Business Manager</i>	5. Project Evaluation by technical teams  6. Introduction call 1 on 1 interaction with ALVAR VILALLONGA  7. System appropriate services determined  8. Requirements / System application architecting  9. Project needs analysis  10. Detailed proposal development  11. Cost and Time effort estimation	12. Introduction call  13. Deliverables discussed with ALVAR VILALLONGA  14. Milestones discussed  15. Project success discussed  16. Future growth alignment  17. Detailed proposal provided  18. Payment instructions	19. Invoice submitted to ALVAR VILALLONGA  20. Payment received  21. Payment confirmation sent to ALVAR VILALLONGA DE ORO  22. Account forwarded to PM

After Project is awarded			
Phase 1	Phase 2	Phase 3	Phase 4
1. Project manager assigned  2. Project initiation/ introduction call  3. Online project profile created  4. Weekly project meetings scheduled  5. Reporting formats explained to ALVAR VILALLONGA	6. Design, Development / technical teams assigned  7. Project start  8. ALVAR VILALLONGA feedback on weekly  9. Weekly project feedback session- 30 min  10. Reports available on-line  11. Online Rebel catering access of PM system application	12. Testing / Quality Assurance  13. Live server testing  14. Final bugs issues fixed  15. Campaign completed	16. Periodic project maintenance  17. Data backups  18. Web site – System application upgrades  19. On line marketing ** Optional

## 5. Proposed Team of Project

The proposed team to achieve the deliverables in a time span of 22-24 Business Weeks comprising of 40 hrs./week is as follows

Designation	Availability
Project Manager	Part Time
Project Expert	Part Time
Designers	Full Time
Developers	Full Time
Quality Analyst	Full Time

**IN WITNESS WHEREOF**, both parties here have to agree the finalized scope for this project as of the date.

**For: ALVAR VILALLONGA DE ORO**

Signature:

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**For: WebMobril Inc.**

Signature:

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