

# SynergyOS Design Guide

## Resources

- [Current Figma Files](#)
  - [Current Brand Guidelines](#)
  - [These documents](#) in Notion where used to explain our vision to a junior UI/UX designer who we hired via Upwork. → Our words are just a vision and nothing final. Be free and create :).
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note:

*everything below is in draft - feel free to read through it or ask me questions directly.*

first a high level picture

## Current Challenges

- Onboarding is broken - time to value takes 20+ minutes.
- Getting content in is difficult
- Navigating chat is not natural (UI/UX on different chats is impossible to understand)
  - some use cases
    - user wants to ask questions about organisation
    - user needs to create for the organisation (internal projects / teams / tepartments)
    - user needs to do someting quickly without any specific context
    - user works on client projects.
  - currently we have 1 chat dashboard but that is focussed on clients & projects. It's confusing and our second biggest problem right now.

## Current Focus / Bottleneck

**Improve onboarding → time to value.**

- If people cannot connect their OpenAI (LLM) API Key succesfully, they currently don't get any value.
  - people don't know what an API Key is or howget it.
  - people assume because they pay for ChatGPT they get this for free

- people get an API key but don't connect their billing which creates errors in our app
- If people don't add a client and project + knowledge (a url, text, documents) they don't experience the value of SynergyOS.
  - people have no idea what documents to put it
  - people don't know how to write

## Onboarding

We define onboarding as the process to get people from **aquisition** to **activation**.

|             |                                                                                         |
|-------------|-----------------------------------------------------------------------------------------|
| Acquisition | When a new user joins                                                                   |
| Activation  | <b>First wow moment:</b> when user experience a context loaded chat for the first time. |
| Retention   | When and why a user comes back to SynergyOS                                             |
| Revenue     | When a user pays for SynergyOS                                                          |
| Referral    | New people joing via word of mouth by existing users/customers                          |

The metric we track is **TIME TO VALUE**. the closer to 0, the better. Currently it's 20 min+

## Ideas we have

- allow the user to experience SYOS without needing an API key. When they want to save, they can create an account.
- after registration the user goes straight to chat mode - the system welcomes the user and guides them through the setup process.
  - Criteria:
    - Personal details of user collected
    - Organisation is setup
    - First client or project is created
    - User learned how to add knowledge via favorite button
    - User learned how to recall knowledge (in a new chat.)
  -  TODO: add demo video of this idea
  - BENEFITS:
    - pro-active chat would create a lot of opportuntiiies
      - setup project
      - setup client
      - follow specific strategy (biz model)

- make the first screen only about adding an API key - otherwise the system is blocked.

## Customer Feedback on MVP 1.0

## 3-Year Vision

SyOS is an operating system for organisation and teams where humans and ai work together on tasks and projects.

We allow external teams build their own autonomous AI agents to manage their social media, projects, reporting etc.

SyOS can do this because it has access to all your information (ai business brain) and it always provides the right context at the right time.

### My personal beliefs:

AI is changing the way work because we can interact in new ways with technology to achieve the same work much faster and better. This changes UI/UX and how we design things. It's not just working with what's been done before. This is an opportunity to imagine what it would look like if our systems were 1000x times smarter. Less screen time, more deep work time. Less stress, more joy.

## Features

|                                                                        |                                                                                                                                                                                                          |
|------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Performance Type</b>                                                |                                                                                                                                                                                                          |
| <b>Permission to Play</b><br>(Must have)                               | -                                                                                                                                                                                                        |
| <b>Performance</b><br>(where do we compete?)                           | <b>Data Collection:</b> Getting information inside your AI system<br><b>Content Control:</b> AI using the right information at the right time<br><b>Customisability:</b> A perfect fit for every company |
| <b>Delighters</b><br>(significant wow effect but not a blocker to buy) | -                                                                                                                                                                                                        |

## Business Model

We currently work with consultants who will implement our technology into organisations. They will setup the system and train the teams to work with SynergyOS.

Based on the specific organisational needs will we sell custom workflows that automate their work much better and faster (no idea yet on UI/UX).

## Who uses SynergyOS

### Personal note:

We believe SYOS requires technical and strategic setup before letting everyone in. So the SETUP User experience is different then the user that got invited to join the organisation on SynergyOS.

| Persona          | description                                                                       | Needs                                                                                                                                                                                                         | Challenges                                                                                             |
|------------------|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| The Setup Role   | early adopter, techy enough to follow guidelines to setup SYOS.                   | <ul style="list-style-type: none"><li>- Connect API keys for AI tools</li><li>- Insert organisational details</li><li>- Connect integrations</li><li>- Invite team members</li><li>- Manage access?</li></ul> |                                                                                                        |
| The daily user   |                                                                                   | <ul style="list-style-type: none"><li>- Get work done for personal, internal, external, with a group, effectively and secure.</li><li>- Communicate A-Sync</li><li>- Privacy protection</li></ul>             | <ul style="list-style-type: none"><li>- Can't keep up with notifications from different tool</li></ul> |
| The Organisation |                                                                                   | <ul style="list-style-type: none"><li>- Get insights</li><li>- Make decisions</li><li>- Control ownership of IP</li></ul>                                                                                     |                                                                                                        |
|                  |                                                                                   |                                                                                                                                                                                                               |                                                                                                        |
| The Invited User | user who got invited by another user. The organisation is (most likely) setup and | <ul style="list-style-type: none"><li>- the user has to learn how to use the platform (and understand why they should care).</li></ul>                                                                        |                                                                                                        |

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## Design Guidelines

- the best user experience even over technically feasible today
- increase flow state and reduce screen time because **the ai can do a lot more for the user today than ever before.**

- simplicity and minimalism even over making work feel like play
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## Current Status

SynergyOS is an AI operating system designed as a second brain for businesses, aiding in project work and knowledge storage. We have released our MVP and received feedback indicating that our onboarding process needs significant improvement. We seek a UI/UX designer to enhance this process, making the time to value quick and effective.

## Next Action

☐ Kick off with Roxanne 🇳🇱

used chatgpt for this:

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### Creative Brief for UI/UX Designer: SynergyOS Onboarding

#### Project Overview:

##### Objective:

To redesign the onboarding experience for SynergyOS, ensuring that users can quickly and effectively set up the system to realize its full potential.

##### Target Audience:

Small and medium-sized businesses.

##### Key Features to Include:

1. Steps for clients to input basic information about their organization and themselves.
2. Emphasis on the importance of adding context such as documents and other knowledge.
3. Connection of this information to the right client, client information, projects, and related knowledge to ensure the system starts delivering value.
4. An innovative, interactive, and conversational onboarding experience, inspired by chat interfaces like Perplexity.AI or ChatGPT with voice.
5. Proactive messages guiding users through the onboarding process in a simple, seamless manner, without the need for multiple screen transitions.

##### Design Philosophy:

Promote simplicity and ease of use, creating an experience that makes users feel comfortable and impressed with how straightforward the setup process is. Encourage the use of imagination, skills, and experience to design an amazing onboarding experience.

##### Inspiration:

Take inspiration from the chat UI/UX design of Perplexity.AI for creating an engaging and effective onboarding process.

**Brand Guidelines:**

Follow the Chromebook available brand guidelines (link to be provided in the document).

**Timeline:**

The sooner, the better. We need this completed as quickly as possible.

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How does this look now?