

Project Name

Capivara - taking the work out of networking

Contributors: PM

Status: Draft

Last Updated: [30-07-2024]

Problem Alignment

Problem Statement:

College students shy away from career networking because it can be intimidating, time-consuming, and difficult to find the right companies and contacts. Additionally, reaching out to people often results in frustratingly few responses

Why This Matters:

- **For College Students:** Simplifies and accelerates the networking process, making it easier to find and connect with relevant contacts.
- **For Universities and Colleges:** Enhances careers services by providing a service to help their students network easier improving their job search and career prospects.
- **For Capivara:** Increased user engagement and satisfaction, potentially leading to higher retention and user acquisition rates. This ensures profitability through scalable operations and value-based pricing

Evidence/Insights:

- **85%** of jobs are filled or discovered through networking, but referrals make up only **7%** of candidates.
- **70%** of jobs are never posted publicly.
- **80%** of professionals consider networking important for career success.
- **40%** of professionals find networking too hard.

Sources: Hubspot survey, CNBC study, LinkedIn survey, Kellogg School of Management, Jobvite.

High Level Approach

Approach:

Develop an AI-driven networking platform that automates the process of identifying and connecting with relevant prospects. Key features include user onboarding & login, AI-powered chat, calendar integration, LinkedIn integration, and an admin portal for universities.

Narrative

Current Scenario:

Prospectors spend significant time identifying and reaching out to potential contacts manually, which is inefficient and often yields poor results.

Future Scenario with Capivara:

A prospector signs up on Capivara, either through their university or personal email, and is guided through an intuitive onboarding process. Using AI, the platform suggests top prospects based on the prospector's profile. AI will contact these prospects on the prospector's behalf and schedule meetings seamlessly.

Goals

● User Goals:

- Simplify the process of networking and meeting scheduling.
 - Provide high-quality prospects based on user profiles.
 - Integrate smoothly with existing tools (LinkedIn, Gmail/Outlook).
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Non-goals

- A native mobile app for iOS or Android will not be developed in the initial phase

- Custom branding options for different universities or businesses is not planned for the initial release
 - **Advanced Analytics (Logs):**
Detailed analytics and reporting for users will not be included in the initial release. For instance, activity the system is doing in the background.
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Solution Alignment

Key Features

1. **User Onboarding:**
 - **Sign-up as part of university:** Validate email domain, set up password, verify email.
 - **Sign-up with personal email:** Validate email, set up password, verify email.
 - **Optional Integrations:** Display Integrations for LinkedIn Profile, Gmail/Outlook, and resume upload as optional steps during onboarding for better networking results
2. **AI-Powered Chat Room:**
 - Greet and gather additional details.
 - Display top 5 prospects (Subject to testing)
 - Handle unsatisfactory results with LinkedIn integration or resume upload.
 - Contact selected prospects and schedule meetings.
 - Allow follow-ups up to x times per contact per week.
3. **Calendar Integration:**
 - **For users without integration:** Prompt to link Gmail/Outlook calendar.
 - **For users with integration:** Display calendar in daily, weekly, monthly view, and allow meeting management (except booking).
4. **LinkedIn Integration:**
 - **Without LinkedIn linked:** Option to link LinkedIn.
 - **With LinkedIn linked:** Option to unlink LinkedIn.
5. **Admin Portal for Universities:**
 - Add and manage university email domains.
 - Manage admin roles with single admin logic. To change admin, there must be at least 1 more member for transfer of ownership.

6. Chatroom Features:

- Help center for FAQs and articles.
 - Notification center for status changes.
 - Avatar fetched from LinkedIn/Gmail.
 - Hamburger menu with Integrations and Calendar widgets.
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Key Flows

Key flows are detailed in the Miro board: https://miro.com/app/board/uXjVKw1Ng1o=

Key Logic

1. Email Validation Logic:

- **Personal Email Sign-Up:** Validate that the email does not belong to a university domain. If it does, prompt the user to sign up through the university sign-up process. Emails should also pass standard email validations.
- **University Email Sign-Up:** Validate that the email domain matches an approved university domain from the admin portal. If not, display an error message. Emails should also pass standard email validations.

2. Profile Completeness Logic:

- Ensure that all required fields (e.g., Preferred Name, Job Role, City, Education, Specialization) are completed during onboarding before allowing access to the dashboard.
- **Optional Integrations:** Display Integrations for LinkedIn Profile, Gmail/Outlook, and resume upload as optional steps during onboarding for better networking results

3. Prospect Matching Logic:

- AI uses user profile data (including LinkedIn integration and uploaded resume if available) to suggest top 5 prospects (subject to UAT). If the user iterates through suggestions multiple times (e.g., 2-3 times) without satisfactory results, prompt the user to provide additional information or integrate LinkedIn/upload resume.

- On the backend, We will tap into a database of 116M business contacts across 7.3M companies, most likely using the likes of Zoominfo's Search API based on profile details of prospectors, their prompts to the AI, and/or uploaded resumes and LinkedIn profile details.

4. Follow-Up Logic:

- Allow prospectors to set up to x follow-ups per contact per week. AI handles sending these follow-up messages based on user prompts.

5. Meeting Scheduling Logic:

- Verify calendar integration (Gmail/Outlook) before scheduling meetings. If not integrated, prompt the user to link their calendar.
- Ensure mutual availability between prospector and prospect before confirming the meeting.
- Send meeting details to both parties' emails & in-chat and update the calendar.

6. AI Interaction Logic:

- AI gathers additional user details during the initial chat that were not collected during onboarding.
- AI can handle basic troubleshooting and direct users to the help center for more complex issues.

7. Notification Logic:

- Send email notifications to users for important updates such as meeting confirmations, responses from prospects, and follow-up reminders. However, Prospectors will have to sign-in for a detailed view of the response & notification.
- Display in-app notifications for real-time updates.

8. Security and Privacy Logic:

- Ensure all user data is encrypted in transit and at rest.
- Implement role-based access control (RBAC) for the admin portal to manage permissions effectively.

9. Error Handling Logic:

- Provide clear and specific error messages for common issues such as invalid email addresses, failed authentication, and missing profile information.
- Implement fallback mechanisms in case AI cannot process a request, directing users to manual processes or help articles/FAQs.

10. **Data Syncing Logic:**

- Regularly sync user data with LinkedIn and calendar integrations to ensure the latest information is used for AI suggestions and meeting scheduling.

11. **Email Masking Logic:**

-Email Generation:

- When a prospector selects a prospect to contact, the system generates a masked email address in the format: prospectername@cavivaraemail.com.

-Inbound Handling:

- Responses to the masked email address are received by Capivara's server and then forwarded to the prospector's actual email address.

-Follow-Up Handling:

- Follow-up emails from the prospector use the same masked address to maintain continuity and privacy.
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Launch Plan

Phases:

1. **Pilot:**

Internal testing within the employee group. Exit criteria: No P0 or P1 bugs for 7 days.

2. **Beta:**

Early cohort of 10 customers. Exit criteria: At least 5 customers would be disappointed if the product was taken away.

3. **Early Access:**

Invite-only customers. Exit criteria: At least 1 win from a competitor.

4. **Launch:**

General availability for all customers in the current market. Exit criteria: Measure and monitor KPIs.

Key Milestones

Target Date	Milestone	Description	Exit Criteria
YYYY-MM-DD	Pilot	Internal testing with employees	No P0 or P1 bugs on a rolling 7-day basis
YYYY-MM-DD	Beta	Early cohort of 10 customers	At least 5 customers would be disappointed if removed
YYYY-MM-DD	Early Access	Invite-only customers	At least 1 win from a major competitor
YYYY-MM-DD	Launch	General availability in current market	Measure and monitor

Operational Checklist

Owner	Prompt	Y/N
	Do we need additional tracking?	
	Do we need a GTM plan?	
	Are there potential legal & risk ramifications?	

Appendix

Changelog

Date	Description
25-07-2024	Initial PRD created
30-07-2024	Roadmap added, Changes suggested by Chris

Open Questions

1. How will the AI handle ambiguous responses during the chat?
2. What measures are in place for data privacy and security, especially with email and calendar integrations?

FAQs

Q: How does Capivara ensure the quality of AI-generated prospects?

A: Our AI uses a combination of user profile data and machine learning algorithms to match the most relevant prospects.

Q: Can users manually improve AI suggestions?

A: Yes, users can provide additional context such as LinkedIn profiles or resumes to improve AI suggestions.

Future Roadmap Items:

- Logs Section
- Prepare for networking calls using Capivara's Coach Greg (AI) call prep.
- Instant feedback on networking calls
- Email Sequencing
- Manual Search of prospects option