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PRD for Deal Aura

An AI solution for Sales teams



Executive Summary & Opportunity Statement

- **The Problem:** Sales teams are bogged down by manual, redundant clerical tasks, spending significant time on prospecting and drafting personalized outreach.
- **The Solution:** Deal Aura, a cloud-based application using Agentic AI and Business Intelligence (BI) to automate searching, booking, and planning for sales teams.
- **Business Impact:** Consolidating these functions will increase sales productivity and provide a competitive advantage by allowing teams to focus on strategy and relationships.



Stakeholder Matrix & Requirements

Stakeholders

- **Sales Professionals:** Primary users for daily automation.
- **Sales Managers:** Use BI reports for tracking team performance.
- **IT Staff:** Define security, technical, and integration protocols.

Functional Requirements

- **AI Prospecting:** Deep-level demographic and canvas research.
- **Pitch Generator:** Automated personalized calls, emails, and decks.
- **Threat Detector:** Monitoring KPIs for potential contract cancellations.





Agentic AI RAG Architecture

- **DFD Overview:** Data flows from Sales Professionals through a User Interface to an AI Agentic Analysis engine, and is stored in a cloud-based DealAura Database. AI RAG uses Orchestration Framework, and Vector Store Metadata
- **System Acquisition:** Developed In-House for total control over proprietary AI Agentic features, includes AI-based servers and chips, and deployed via Cloud Computing (SaaS/PaaS) for global accessibility.
- **Security:** Follows a DevSecOps model, ensuring the source code is secure from the start of the build. AI Guardrails are also enabled.

Implementation Strategy

Methodology:

A Hybrid Method using Waterfall for initial design/documentation and transitioning to Agile for product development sprints.

Phases:

1. Phase 1 (Waterfall): Requirements and documentations gathering, design, charter, roadmap, kickoff
2. Phase 2 (Agile): Sprints for core features, AI integration, and API setup
3. Phase 3 (Deployment): User Testing and product rollout, go-to-market





Success Metrics & Maintenance (ITIL Focused)

Success Metrics:

- **User Acceptance:** Users accept the new product without issues
- **Added Value:** As users and businesses quickly adopt the new product, this reduces their overhead expenses, and increases profitability for them, realizing the product real value

Maintenance Strategy:

- **Corrective:** Dedicated team for addressing post-launch user issues
- **Adaptive:** Monitoring cloud provider updates and API changes
- **Preventive:** Regular security audits and server / system monitoring

Product Roadmap: Deal Aura Development Lifecycle

The project follows a Hybrid Methodology, utilizing Waterfall for initial design and documentation, then transitioning to Agile for development and maintenance.

Phase	Timeline	Focus Area	Key Activities
Phase 1: Foundation (Waterfall)	Month 1-2	Requirements & Design	Documentation, SRD creation, and system architecture planning
Phase 2: Core Build (Agile Sprint 1)	Month 3-5	Infrastructure & AI Core	Setting up cloud infrastructure (AWS/Azure/GCP) and AI/LLM model training
Phase 3: Integration (Agile Sprint 2)	Month 6-8	API & Features	Developing backend APIs for CRM integration and primary automation features

Product Roadmap: Deal Aura Development Lifecycle (pg 2)

Phase 4: QA & UAT (Agile Sprint 3)	Month 9-10	Testing & Quality	Unit testing, integration testing, and User Acceptance Testing with sales pros
Phase 5: Launch & Support	Month 11-12	Deployment & Training	Cloud rollout, training sessions for staff/managers, and Tier 1 support setup
Post-Launch: Growth	Ongoing	Maintenance	Proactive bug tracking (Corrective), API updates (Adaptive), and new features (Perfective)

Proof of Concept and MVP for DealAura

Please refer to the Software Systems Design
Proposal for more details.

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