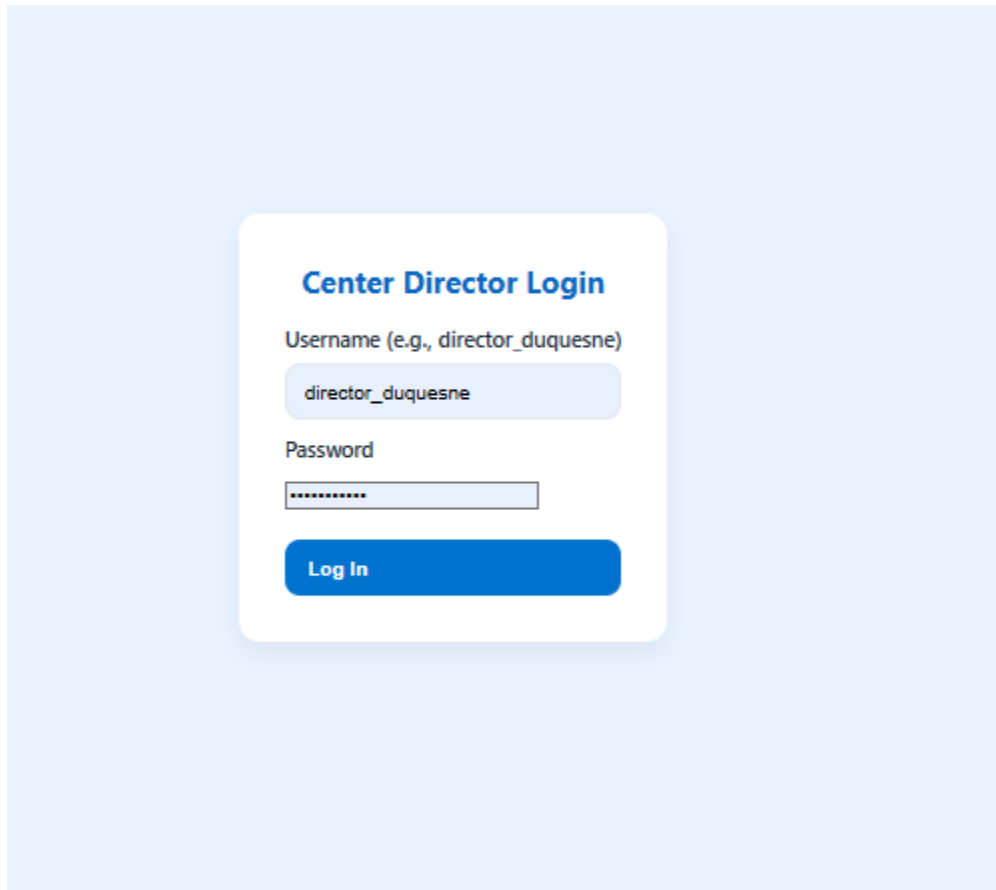


## 1.Center Director Login Screen

This screen provides secure, role-based access for Center Directors to log in and manage center-specific data, ensuring that client intake analysis, consultant recommendations, and analytics remain restricted to authorized users.



The image shows a login screen for Center Directors. It features a white rounded rectangle centered on a light blue background. Inside the rectangle, the title "Center Director Login" is displayed in blue. Below the title, there are two input fields: "Username (e.g., director\_duquesne)" with the value "director\_duquesne" entered, and "Password" with a masked password represented by dots. A blue "Log In" button is positioned at the bottom of the form.

**Center Director Login**

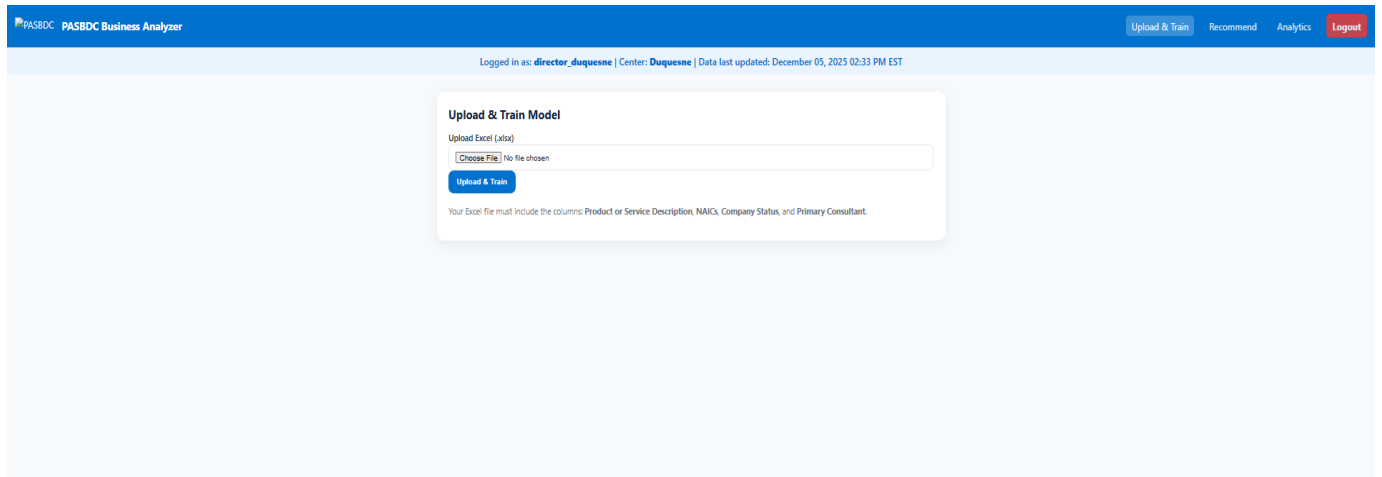
Username (e.g., director\_duquesne)  
director\_duquesne

Password  
.....

**Log In**

## 2.Upload & Train Model Interface

This screen allows authorized Center Directors to upload a center-specific dataset to train the AI model. For data integrity and governance purposes, the dataset is typically uploaded once, with the system displaying the date, time, and user associated with the most recent upload. This ensures transparency, accountability, and consistent model behavior.



### 3. Startup Identification and First Step Referral

Clients with no prior business ownership and no First Step history are identified as startups and automatically referred to First Step: Business Essentials.

Logged in as: **director\_duquesne** | Center: **Duquesne** | Data last updated: December 18, 2025 01:50 AM EST

#### New Client → Recommendation

Primary NAICS

561500 - All Other Travel Arrangement and Reservation Services

Company Status

Startup (< 1 year)

Client Description

The client operates a travel services business providing specialized travel arrangement and reservation services. Offerings may include customized trip planning, booking coordination, itinerary management, and reservation services for individuals and groups. The business supports leisure and business travelers by managing travel logistics and related services.

Client Seeking Major Funding? (High-Stakes Client)

Checking this forces the recommendation system to prioritize **\*\*low-workload consultants\*\***.

Recommend Consultant

Recommended Consultant: **First Step: Business Essentials**

Mandatory Referral: All **\*\*new\*\*** startups are directed to 'First Step: Business Essentials' before specialized consulting.

Accept & Log

Reject

Reassign (Next Best Score)

► [Current Center Analytics \(Click to Expand\)](#)

#### 4. AI-Supported Consultant Recommendation

For established or growing businesses, the system analyzes the client’s industry (NAICS), business stage, and description to recommend the most suitable consultant. The recommendation also accounts for current consultant workload, clearly indicating when a strong expertise match may have a lower suitability score due to capacity constraints. Users can accept the recommendation, reject it, or reassign the client to the next best available consultant.

Logged in as: **director\_duquesne** | Center: **Duquesne** | Data last updated: December 18, 2025 01:50 AM EST

### New Client → Recommendation

Primary NAICS  
531120 - Lessors of Nonresidential Buildings (except Miniwarehouses)

Company Status  
Growing (3–5 years) ▼

Client Description  
We own a commercial office+warehouse building in Lawrenceville. We rent out the space to a building supplies sales company.

Client Seeking Major Funding? (High-Stakes Client)  
Checking this forces the recommendation system to prioritize **\*\*low-workload consultants\*\***.

**Recommend Consultant**

**Recommended Consultant: Denis Olson**

*⚠ Recommendation is the top expertise match, but Suitability Score is low due to high workload.*  
Other suitable options (by Suitability Score): Sarah Matta, Douglas Harding, Cynthia Oliver, Richard Longo

▶ [Current Center Analytics \(Click to Expand\)](#)

## 5.Real-Time Analytics with Controlled Updates

This dashboard displays current consultant workloads, overall industry distribution, and consultant-specific specialization. To preserve data accuracy, analytics do not update until a recommendation is formally accepted and logged. Viewing or generating a recommendation alone does not alter workload counts or industry metrics.

Logged in as: **director\_duquesne** | Center: **Duquesne** | Full Analytics Dashboard

### Duquesne Analytics

#### Consultant Assignments (Workload)

Consultant	Assignments (Current Count)
Don Lodge	360
Douglas Harding	320
Denis Olson	242
Cynthia Oliver	130
Sarah Matta	120
Richard Longo	50
John Higgins	30
Tyler Benninger	10

#### Overall Top Industries (NAICS)

- 722511-Full-ServiceRestaur
- 541611-AdministrativeManag
- 812112-BeautySalons
- 458110-ClothingandClothing
- 236118-ResidentialRemodel
- 456120-Cosmetics BeautySt
- 713940-FitnessandRecreatic
- 541613-MarketingConsulting
- 811710-EducationalSupportS
- 561720-JanitorialServices
- 812990-AllOtherPersonalSer
- 722513-Limited-ServiceRest

Select Consultant to view industry focus:

Denis Olson (242) ▼

**Filter**

#### Industries for Denis Olson

Industry (NAICS)	Count
611710-EducationalSupportServices	3.0
458110-ClothingandClothingAccessoriesRetailers	3.0
236118-ResidentialRemodelers	3.0
541620-EnvironmentalConsultingServices	3.0
456191-Food(Health)SupplementRetailers	3.0
332999-AllOtherMiscellaneousFabricatedMetalProductManufacturing	3.0
811111-GeneralAutomotiveRepair	2.0
541519-OtherComputerRelatedServices	2.0
541613-MarketingConsultingServices	2.0
722511-Full-ServiceRestaurants	2.0

After selecting Accept & Log, the system updates the count to **243**.

## 6. Accepted, Rejected, or Reassigned Recommendation

After a decision is made, the system immediately updates the recommendation status to reflect the user's action. When **Accept & Log** is selected, the assignment is recorded, analytics are updated, and the model is retrained. Selecting **Reject** records the decision without updating workload counts, while **Reassign** routes the client to the next most suitable consultant based on the updated suitability score.

Logged in as: **director\_duquesne** | Center: **Duquesne** | Data last updated: December 18, 2025 01:50 AM EST

### New Client → Recommendation

Primary NAICS  
531120 - Lessors of Nonresidential Buildings (except Miniwarehouses)

Company Status  
Growing (3–5 years) ▾

Client Description  
We own a commercial office+warehouse building in Lawrenceville. We rent out the space to a building supplies sales company.

Client Seeking Major Funding? (High-Stakes Client)  
Checking this forces the recommendation system to prioritize **\*\*low-workload consultants\*\***.

**Recommend Consultant**

**Recommended Consultant: Denis Olson**

✔ Denis Olson accepted, logged, and **\*\*model retrained successfully\*\***.

✔ **Accept & Log**    ✖ **Reject**    🔄 **Reassign (Next Best Score)**

▶ **[Current Center Analytics \(Click to Expand\)](#)**

## 7. Analytics Updated Upon Accepted Assignment

After acceptance, the dashboard updates to show the consultant's new workload total (243).

