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Abstract

This document is created for BriefBot Application which describes the key features and functionalities to be implemented in New System

**Product requirement document**

**BriefBot App**

**Project Title:** BriefBot Application

**1. Introduction**

BriefBot is an application designed to summarize user conversations and create a shareable web link. The generated link will present the conversation in a structured format with multiple sections for summary, timeline, and milestones. This application aims to enhance communication efficiency by providing users with a concise and easily accessible summary of their discussions.

**2. Purpose**

The purpose of this document is to outline the requirements for developing the Conversation Summarizer and Web Link Creator application called BriefBot, including functional and non-functional requirements, user interface design, and technical specifications.

**3. Scope**

* **In Scope**:
  + Summarizing user conversations.
  + Creating a shareable web link with structured sections.
  + Sections: Summary, Timeline, and Milestones, Resources and Dashboard.
  + User interface for initiating conversation summarization.
  + Storage and retrieval of conversation summaries.
* **Out of Scope**:
  + Real-time conversation summarization.
  + Integration with external chat platforms (future consideration).
  + Advanced NLP features such as sentiment analysis (future consideration).

**4. Functional Requirements**

**4.1 Conversation Summarization**

* The application shall be able to process user conversations and generate a concise summary.
* The summary shall capture key points and highlights of the conversation.

**4.2 Web Link Creation**

* The application shall create a shareable web link for each summarized conversation.
* The web link shall present the summarized conversation in a structured format with sections: Summary, Timeline, and Milestones, Resources and Dashboards

**4.3 Sections Breakdown**

* **Summary**:
  + The application shall provide an overall summary of the conversation, highlighting the main topics and conclusions.
* **Timeline**:
  + The application shall present a chronological timeline of the conversation, including timestamps and key exchanges.
* **Milestones**:
  + The application shall identify and list significant milestones discussed during the conversation.
* **Resources:** 
  + The application shall identify the resources such as documents, videos, audio files that can help the users to understand the requirements better.
* **Dashboards**
  + The application shall provide dashboards for users to know about the lead status

**4.4 User Interface**

* The application shall provide a user-friendly interface for users to initiate conversation summarization.
* Users shall be able to view and manage their summarized conversations and generated links.

**4.5 Storage and Retrieval**

* The application shall store summarized conversations and generated links securely.
* Users shall be able to retrieve and share previously generated links.

**5. Non-Functional Requirements**

**5.1 Performance**

* The application shall generate summaries and web links within a reasonable time frame (e.g., under 30 seconds).

**5.2 Scalability**

* The application shall be able to handle multiple summarization requests concurrently.

**5.3 Security**

* The application shall ensure that user conversations and generated summaries are stored securely.
* Access to summarized conversations and generated links shall be restricted to authorized users.

**5.4 Usability**

* The application shall have an intuitive and easy-to-navigate user interface.

**6. User Interface Design**

**6.1 Project Leads Creation**

* Screen to capture the new Project leads which should have the Prospect name, contact, requirement, enquiry date

**6.2 Main Screen**

* Grid to view all the Project Leads created in the system
* Button to start a new conversation summarization against the project selected
* List of previously summarized conversations with options to view, edit, and share.

**6.3 Conversation Summarization Screen**

* Input field for user conversation to capture various sections described under 4.3
* Button to generate summary and create web link.
* Display of generated summary, timeline, and milestones with resources(Audio/Video/Reference Documents)
* Option to save or discard the summary.

**7. User Stories**

**7.1 User Stories for New Lead creation**

* As a Sales Representative, I want to receive notifications about new project leads so that I can follow up promptly.
* As a Marketing Specialist, I want to automate email campaigns to nurture leads so that I can keep them engaged until they are ready to be contacted by sales.
* As a Sales Representative, I want to qualify leads based on predefined criteria so that I can prioritize my efforts on the most promising opportunities.
* As a Project Manager, I want to access detailed information about a lead before a meeting so that I can prepare adequately and address the client's needs effectively.
* As an IT Administrator, I want to integrate the lead generation system with our CRM software so that lead information is synchronized and up-to-date across platforms.
* As a Sales Representative, I want to receive reminders for follow-up actions on my leads so that I do not miss any important deadlines or opportunities.
* As a Customer, I want to receive confirmation and updates after submitting my project lead so that I know my request is being processed.
* As a Sales Manager, I want to track the performance of my team in converting leads into projects so that I can provide targeted coaching and support.
* As a Marketing Analyst, I want to segment leads based on industry, size, and location so that I can tailor our outreach efforts more effectively.

**7.2 User Stories for recording the user conversations**

* **As a** User, **I want to** Record a conversation with the new project lead in the system **So that I can** Keep a detailed and organized history of all interactions for future reference
* **As a** User, **I want to:** View the history of all recorded conversations with the project lead **So that I can:** Review past discussions and follow up on any pending action items
* **As a** User, **I want to:** Edit the details of a recorded conversation **So that I can** Correct any mistakes or add additional information
* **As a** User, **I want to** Delete a recorded conversation **So that I can** Remove any erroneous or irrelevant records from the system
* **As a** User, **I want to:** Search for specific conversations based on keywords or topics  
  **So that I can** Quickly find relevant discussions and action items

**7.3 User Stories for capturing Milestones and Timelines**

* **As a Project Lead Coordinator**, I need to capture detailed milestones and timelines for new projects based on customer expectations, so I can ensure alignment with their specific requirements.
* **As a Customer Success Manager**, I want to document project lead timelines and milestones as per customer expectations, to proactively manage customer satisfaction and deliver projects on time.
* **As a Sales Representative**, I require a system to record project lead milestones and timelines according to customer expectations, ensuring accurate communication and alignment throughout the sales process.
* **As a Product Manager**, I need visibility into project lead timelines and milestones based on customer expectations, enabling me to prioritize feature development and deliverables accordingly.
* **As a Development Team Lead**, I want to document project lead milestones and timelines aligned with customer expectations, facilitating clear planning and execution of development tasks.

**7.4 User Stories for uploading Project Resources against Project Leads**

* **As a Product Owner**, I require a feature to upload and manage various types of media files (video, audio, text) against project leads, ensuring all relevant information is easily accessible and well-documented.
* **As a Product Owner**, I need a centralized repository where I can securely upload and store video, audio, and text files against each project lead, facilitating efficient communication and collaboration with stakeholders and team members.

**7.5 User Stories to view leads status in Dashboards**

* **As a Sales Manager**, I want to view the status of new leads in a dashboard, so I can monitor the sales pipeline and ensure that new opportunities are being actively pursued.
* **As a Sales Representative**, I need a dashboard that displays the status of my new leads, allowing me to prioritize my outreach efforts and focus on high-potential opportunities.
* **As an Executive**, I want an overview of new lead statuses in a dashboard, enabling me to track the performance of the sales team and make strategic decisions based on current lead activity.
* **As a Marketing Manager**, I require a dashboard view of new lead statuses to analyse the effectiveness of marketing campaigns and adjust strategies to generate more qualified leads.
* **As a Customer Relationship Manager**, I want to see the status of new leads in a dashboard, so I can ensure timely follow-up and engagement to convert leads into loyal customers.
* **As an Operations Manager**, I need a dashboard that shows the status of new leads to align operational activities and support the sales team in converting leads to customers.
* **As a Business Development Executive**, I want to view new lead statuses in a dashboard, enabling me to identify potential business opportunities and collaborate with the sales team to close deals.
* **As a Product Manager**, I need to see the status of new leads in a dashboard to understand market demand and adjust product offerings or development priorities accordingly.

**7.6 User Stories for generating a web link on user conversation**

* As a Product Owner, I want to automatically generate a shareable web link for conversations about the new project lead so that I can easily share the information with stakeholders.
* As a team member, I want to receive a web link after discussing the new project lead, so that I can refer back to the conversation whenever needed.
* As a senior executive, I want to receive a web link summarizing the team’s discussion about the new project lead so that I can stay informed about team dynamics and leadership changes.

**8. Technical Specifications**

**8.1 Platform**

* Web-based application accessible via modern web browsers.

**8.2 Backend**

* Server-side processing for conversation summarization.
* Database for storing user conversations, summaries, and generated links.

**8.3 Frontend**

* Responsive design to ensure usability across different devices.
* Use of modern web technologies (HTML, CSS, JavaScript).

**8.4 APIs**

* RESTful APIs for conversation summarization and web link creation.

**9. Milestones and Timeline**

**9.1 Development Phases**

* **Phase 1**: Requirements Gathering and Design (2 weeks)
* **Phase 2**: Backend Development (4 weeks)
* **Phase 3**: Frontend Development (4 weeks)
* **Phase 4**: Integration and Testing (2 weeks)
* **Phase 5**: User Acceptance Testing (2 weeks)
* **Phase 6**: Deployment and Launch (1 week)

**10. Conclusion**

The BriefBot application will streamline the process of summarizing user conversations and sharing them in a structured format. By adhering to the outlined requirements and timeline, the development team aims to deliver a functional and user-friendly application that enhances communication efficiency.