1. Core Outcome

- **In one sentence:** Prove that messy client inputs can be transformed into a structured, client-approved creative brief in minutes, not days.

- **Minimum visible outcome:** User uploads or enters project inputs → system generates an AI-powered draft brief → client/agency can review, edit, and approve via a branded link.

2. User Flows (Final for PoC/MVP)

These MUST work end-to-end:

- **Flow 1:** Client/agency fills guided intake form (including optional voice input or uploaded call transcripts) → AI generates draft brief → agency edits → client reviews/approves.

- **Flow 2:** Agency uploads supporting docs (e.g., brand guidelines) → system uses them in the draft brief → flagged gaps prompt user.

- **Flow 3:** Final approved brief exported as structured document (PDF + copyable text) → saved in system.

3. Success Criteria

- **Complete when:** A real agency tester can go from intake → AI draft → approval → export in one seamless experience.

Done looks like:

- Intake wizard with conditional logic
- AI draft with editable text
- Missing info flags
- Client-facing review/approval link
- Export option (PDF + copy)

Nice-to-have (not required):

- PM tool integrations (Asana, Monday, etc.)
- Advanced analytics (brief quality scores, dashboards)
- Multi-language support

4. Scope Boundaries

Out of scope (this phase):

- Deep PSA/PM integrations (Productive, Asana, Jira, etc.)
- Real-time multi-user collaboration
- Full estimation engine (only placeholder messaging now)
- Mobile apps

If cut one thing now: Document upload parsing. Keep intake form + AI draft core alive first.

5. Users & Testers

- **Testers:** 5–10 agency PMs, client service directors, and strategy leads at mid-market creative/digital agencies.
- **They need to see:**
  - AI-generated draft that looks like a “real” brief they’d actually send
  - A simple approval flow (client can comment/approve)
  - Export they can hand off internally
- **Most important feedback:**
  - Accuracy of AI draft
  - Clarity/ease of intake process
  - Client approval experience

6. Constraints

- **Budget tolerance:** Lean SaaS PoC budget. Optimize for speed, not bells & whistles.
- **Timeline tolerance:** 90 days max (from kickoff to live PoC).
- **Compliance/security (PoC):**
  - Basic data encryption
  - SOC 2/security posture messaging placeholder, but don’t invest heavy yet
  - GDPR/CPRA awareness (but no enterprise-grade hosting until v1.0)

7. Beyond This Phase

- **Next build if success:**
  - Estimation engine (historical data + role-rate scoping)
  - Deeper client approval workflows (version tracking, side-by-side diffs)
  - Pilot PSA/PM integrations (Productive, Asana, Monday)
- **Can safely wait until v2.0+:**
  - Real-time multi-user editing
  - Advanced analytics dashboards (rebrief rates, cycle times, ROI)
  - Marketplace integrations (Slack, Teams, CRM, etc.)
  - White-label customization

8. Required Input Fields (Initial Scope)

To begin the intake process, the following fields must be collected from the user:

Project Metadata

- Brief Submission Date
- Project Due Date
- Project Name
- Project Owner
- Brand
- Category

Scope & Deliverables

- Deliverables (with channel/platform detail)
- Project Brief (file upload)

Strategic Context

- Objectives & Goals
- Target Audience (personas, demographics, psychographics)
- Key Messaging / Value Proposition
- Mandatories (brand assets, legal disclaimers, required copy)
- Budget & Resources (range if known)
- Timeline / Milestones (beyond final due date)

Creative Direction

- Tone & Style (formal, playful, premium, etc.)
- Competitors / Inspiration (examples to follow or avoid)

Approvals & Constraints

- Approval Stakeholders (names/roles)
- Risks / Constraints (regulatory, sensitive topics)

Optional but Valuable

- KPIs & Success Criteria (metrics for success)
- Background Context (prior campaigns, research, insights)

9. Conditional Logic Rules (Intake Wizard)

To ensure users only see relevant questions, the intake form must include conditional branching:

Project Category → Deliverables

- If user selects “Social Campaign” → show fields for social platforms, ad formats, KPIs.
- If “Website Redesign” → show fields for pages, CMS preferences, integrations.
- If “Branding” → show fields for logo, visual identity, style guide references.

Deliverables → Channels

- If Deliverables include “Video” → ask for length, aspect ratio, distribution channels.
- If Deliverables include “Print” → ask for format, dimensions, print specs.

Budget

- If budget range provided → enable AI to scope feasibility and estimate ballpark hours/costs.
- If no budget provided → skip estimation, flag as missing for follow-up.

Target Audience

- If “General” → minimal demographic prompts.
- If “Specific Persona” → expand to ask about demographics, psychographics, and pain points.

Tone & Style

- If user selects “Custom” → open free text box for detailed guidance.
- If “Use Brand Guidelines” → prompt file upload/link to existing guide.

Approval Stakeholders

- If >1 stakeholder → display option to assign primary approver vs. reviewers.