Meeting Minutes – SurvAI Software Development for Flettons

Date: 16 October 2025**Project:** SurvAI – AI-Powered Building Survey Reporting System**Attendees:**

Simon Hanchard – Lead Surveyor / Product Owner (Flettons)
Adel Hassan – Lead Developer/Project Manager
Ember – Senior Backend Developer
Umar Habib – Developer (Client Dashboard)
Umar Farooq – Designer (UI/UX)
Amir – Developer
Omer Ali – Project Coordinator

Next Meeting: Date TBC

Purpose of the Meeting

To brief the development team on Flettons' end-to-end surveying workflow, identify workflow inefficiencies, and define the initial MVP scope for the SurvAI system.The goal is to streamline report writing using AI-driven transcription, data input forms, and automated report generation.

1. Overview of Current Workflow

Lead Capture & Job Creation

- Clients visit the Flettons website, select a service, and submit property details via an online form.
- Data is captured in Keap/Infusionsoft CRM.
- Payment triggers automated tagging and confirmation emails.
- A job booking is manually added to Outlook Calendar.

Coordination & Confirmation

- Survey dates are confirmed via email forms (no phone calls, for compliance and record-keeping).
- Assistant (Lexi):
- Confirms bookings via forms linked to the CRM.
- Creates a report template in the reporting software.
- Inputs client details, property address, and the chosen survey level (Level 2, Level 3, Level 3+, or Roof Report).

On-Site Process

- The surveyor records continuous video walkthroughs using an iPhone.
- Videos are merged and transcribed via third-party software.
- Transcriptions are manually copied into report templates.
- Photos are uploaded and labelled manually.

Post-Inspection Workflow

- Data from transcriptions is entered manually into a web-based report editor.
- Images are uploaded individually and captioned.
- A summary form sends AI-generated extracts to clients via Zapier automation.
- Final reports are exported as PDFs with hyperlinks.

2. Identified Problems with Current System

Issue	Description
Too many manual steps	Video editing, transcription, and formatting are time-consuming.
Non-intuitive interface	The current software requires excessive clicking and scrolling.
Inefficient image handling	Small previews, no batch actions, and poor usability.
Cognitive overload	Too many interactions – “the fewer clicks, the less thinking.”
No automation	CRM, calendar, and report systems are disconnected.

3. SurvAI Vision

Develop an AI-powered system that:

- Captures survey data (via video, tick boxes, or manual input).
- Automatically transcribes and structures data.
- Generates professional, RICS-compliant reports.
- Eliminates repetitive admin tasks and ensures consistent quality.

4. MVP Functional Scope

Core MVP Components

1. **Web-Based Tick-Box Form (Phase 1 – MVP)**
   - For on-site data collection.
   - Allows surveyors to select materials, defects, and conditions.
   - Includes optional note fields for observations.
   - Links directly to pre-defined report templates.

2. **AI Integration**
   - Connect to ChatGPT Assistant API.
   - Converts transcriptions or tick-box inputs into structured report text.
   - Applies automated condition ratings (Green/Orange/Red) based on text.

3. **Template-Driven Reports**
   - Level 2 and Level 3 templates initially.
   - Later: Level 3+ (with drone and cost tables) and Roof Report.
   - Each section (Roof, Walls, Windows, etc.) has its own prompt logic created by Simon.

4. **Web-Based Editor and PDF Export**
   - Editable text fields for AI-generated content.
   - Hyperlinked navigation between report sections.
   - PDF export capability with professional formatting.

5. **CRM Integration (Keap)**
   - Automatically create templates when bookings are confirmed.
   - Use secure API or SOC 2-compliant connection.

5. Future Features Beyond MVP

Feature	Description
Drag-and-drop uploads	Upload videos directly for automatic transcription.
Timestamp-linked photos	Match photo timestamps with transcript times to allocate images to correct sections.
Annotation tools	Simple markup for images (arrows, notes, highlights).
Quality-control gauge	AI feature that rates text defensibility and completeness.
Built-in camera recorder	Record directly within the app, auto-uploading footage to the client's profile.

6. Data Management and Compliance

Requirement	Detail
File retention	Minimum of 15 years (preferably lifetime).
Storage	Use AWS S3 or Adora for video and photo storage.
Transcription	AWS Polly or Transcribe for voice-to-text conversion.
GDPR compliance	No sharing of client emails or data with external users.
Data sync	CRM, database, and calendar must auto-update.

7. System Workflow Summary

- Job created on website → CRM → Tag → Calendar entry auto-created.
- Survey conducted → Video captured → Transcript generated (AI or AWS).
- Tick-box form completed → Data sent to SurvAI backend.
- AI processes data → Structured report sections generated.
- Images auto-linked to relevant sections using timestamps.
- Report reviewed and edited in web-based editor.

- PDF generated and uploaded to client dashboard.
- Client receives login credentials and can download reports or upload certificates.
- Future functionality: AI summaries of uploaded documents.

8. Development Discussion Points

- **Form design:**Large, easy-to-tap tick boxes for quick input; minimal scrolling.“Add Section” button to create multiple roof or wall sections.
- **Data structure:**Each section (e.g. roof, wall, floor) stored in a database table with fields for room, location, notes, and images.
- **User roles:**Different user levels – Surveyor, Admin, and Client.
- **Performance:**Prioritise minimal clicks and maximum speed for on-site use.
- **Quality control:**Future AI feature to audit reports and ensure legally robust wording.

9. Roles and Responsibilities

Name	Role	Responsibility
Simon Hanchard	Product Owner	Define prompts, provide workflows, test MVP
Ember	Backend Lead	Database, AI integration, report engine
Umar Habib	Developer	Client dashboard, authentication, and report delivery
Umar Farooq	Designer	UI/UX for forms and web editor
Amir and Omer Ali	Support	QA testing and coordination

10. Agreed Actions and Next Steps

1. **Simon**
   - Send tick-box form concept sketches.
   - Share GPT prompt templates (Roof, Walls, etc.).
2. **Development Team**
   - Draft technical architecture for MVP.

- Confirm ChatGPT API integration method (Assistant mode).
- Propose database schema for timestamp-linked media and report sections.

3. **UI/UX Team**
   - Design form layouts and web editor prototypes.

4. **Next Meeting**
   - Review MVP architecture and front-end layouts.
   - Confirm development priorities (Tick-box Form → AI → Dashboard).

11. Meeting Summary

The team agreed that the SurvAI MVP will begin with a web-based tick-box data collection form connected to AI-generated report text and PDF export functionality.Future versions will include drag-and-drop uploads, automatic photo sorting, and quality-control AI.The long-term goal is to reduce manual workload, automate reporting, and create an all-in-one ecosystem from survey booking to client report delivery.