# Phase 1: Problem Understanding & Industry Analysis

Project Title: Smart Tasks & Email Summarizer for Executives

## 1. Requirement Gathering

Objective: Understand what executives need in terms of email and task summarization.  
  
Requirements:  
- Summarize long emails into short key points.  
- Generate action items (tasks) automatically from text.  
- Provide priority tagging (urgent, important, informative).  
- Integrate with Salesforce Inbox, Outlook, Gmail.  
- Provide summaries on Salesforce mobile app for executives on the go.  
  
Salesforce Tools: Einstein GPT, Apex triggers, Flows, Salesforce Email Integration APIs.

## 2. Stakeholder Analysis

Primary Stakeholders:  
- Executives/Managers: Need quick insights instead of reading full reports.  
- Sales Teams: Want summarized client communications.  
- HR/Operations: Save time reading lengthy policy or vendor updates.  
  
Secondary Stakeholders:  
- IT/Admins: Configure Salesforce setup, maintain security.  
- Developers: Build custom summarizer logic using Apex & LLMs.  
  
Output: Clear view of who benefits and who maintains the solution.

## 3. Business Process Mapping

Current Flow (Without Summarizer):  
- Executives receive 100+ emails daily.  
- They spend 2–3 hours reading through reports.  
- Important action points are often missed.  
  
Proposed Flow (With Summarizer):  
- Emails sync into Salesforce.  
- Summarizer extracts summary + action items.  
- Tasks are created automatically in Salesforce.  
- Executives see short digest instead of full text.

## 4. Industry-specific Use Case Analysis

Finance: Summarize compliance reports, auto-create tasks for risk alerts.  
Healthcare: Summarize patient case updates, highlight urgent follow-ups.  
IT/Consulting: Summarize project updates & client escalations.  
Sales/CRM: Summarize customer emails & create follow-up tasks.  
  
This proves the solution is not just generic but industry-relevant.

## 5. AppExchange Exploration

Existing Tools:  
- Einstein Activity Capture (for syncing emails).  
- Summarizer Apps (some third-party AI summarizers).  
- TaskRay (task management).  
  
Gap: Most tools provide either email syncing or task management, but not AI-based summarization + automatic task creation inside Salesforce.  
  
Conclusion: This project fills this gap.