

Umuthi Client Process Framework

1. RootScan

Tier 1: Search and Authority Audit – highly automated

Product promise

“Root your presence with an AI-informed content audit that reveals exactly where your brand stands and how to grow.” (umuthi.io)

Stage	Purpose	Key Activities	Tangible Output
Quick-fit questionnaire	Capture primary goals and data access constraints	Ten-minute Fillout form on booking; automatic verification of domain ownership and analytics permissions	Alignment score and access checklist
Data ingestion pipeline	Gather structured visibility signals	API pulls from SE Ranking , Search Console, Perplexity Labs scrape, backlinks index, CMS crawl; Make.com transforms raw data and pushes to ClickUp	Unified data warehouse for analysts
Multi-channel diagnostic	Quantify discoverability gaps across Google, Bing, Perplexity and ChatGPT citation graphs	Python scripts run visibility check, topic clustering and competitor share-of-voice	RootScan Report – scorecard plus heat-map of untapped authority clusters
Needs synthesis session (optional, forty-five minutes)	Translate numbers into business priorities	Analyst walks client through findings, probing for objectives and capacity limits	Ranked list of validated needs
Action brief	Reveal quick wins and next logical step	Deliverable Gamma PDF outlining critical fixes, effort estimates and suggested upgrade path (Evergreen	Clear decision path for client

		Blueprint or standalone tasks)	
--	--	--------------------------------	--

2. Evergreen Blueprint

Tier 2: Content Strategy and Recommendations – partly automated

Product promise

“Start scaling your online presence with a purpose-aligned content strategy.” (umuthi.io)

Stage	Purpose	Key Activities	Tangible Output
Strategy discovery call	Surface brand story, tone and internal capacity	Stakeholder interview using Tone of Voice prompts; collect brand guidelines and legacy assets with Fillout questionnaire	Creative brief and capacity map
Content pillar design	Identify evergreen themes that match audience intent	Combine RootScan data with People Also Ask scrape; cluster topics, map funnel stages and ethical positioning	Pillar matrix with priority topics
Knowledge base seeding	Prepare AI-ready source material	Upload PDFs, decks and transcripts to private (NotebookLM?) collection; tag documents for Retrieval Augmented Generation	Searchable knowledge base
Blueprint sprint	Build a ninety-day execution roadmap	Draft pillar outlines, SEO briefs, newsletter hooks, CTAs, repurposing cues; log technical tickets in (ClickUp?)	Evergreen Blueprint deck and Kanban backlog
Sign-off and KPI setting	Lock success measures and resource plan	Joint review to set authority goals, content velocity and engagement metrics, plus deliverable Gamma PDF	Signed roadmap feeding Impact Engine scope

3. Impact Engine

Tier 3: Automation and Optimisation – partly automated

Product promise

“Grow your brand and amplify your message with AI content automation and human support.”

(umuthi.io)

Stage	Purpose	Key Activities	Tangible Output
Workflow architecture	Map every touch-point from lead capture to publish	Model processes in (Google Docs?), marking data hand-offs and custom functions	End-to-end swim-lane diagram
Secure service layer build	Protect sensitive data while automating	Deploy serverless functions (AWS Lambda or Cloud Run?) for file conversion, summarisation and tagging. Make.com calls our endpoints to avoid third-party data leaks	Private API catalogue with run cost table
Model selection and hosting	Match task to the most suitable LLM	Spin up task-specific Hugging Face models (meeting-summary, metadata-extract and so on) in isolated containers; log token spend per client	Model registry and usage dashboard
Content engine execution	Produce, approve and distribute at scale	Pipeline drafts content, routes for human QA, then publishes to CMS, social scheduler and email on a single status change. Can built in HITL aspects.	Zero-handoff publishing record
Performance loop	Detect evolving needs and optimisation wins	Monthly dashboard pulls analytics, AI citation mentions and automation saves; anomalies trigger ClickUp tasks	Continuous improvement backlog with upsell prompts

Why the three-tier hierarchy matters

- **Progressive discovery** – each tier captures deeper context so we automate only what matters.
- **Need-first checkpoints** – every stage forces a structured conversation or data gate that surfaces real pain points before any build.
- **Reusable IP** – serverless scripts, private models and template scenarios reduce marginal cost while keeping data sovereign, echoing Umuthi’s ethical stance.

