CreateOS - Step-by-Step Detailed PRD

This PRD covers all 12 steps discussed for CreateOS, including features, user stories, and acceptance criteria.

Step 1: Super Admin Setup

Objective: Establish organizational hierarchy, team members, and access permissions.

Features: - Hierarchy creation (departments, teams, reporting structure) - User invitation & onboarding - Role-based access control (Super Admin, Admin, Growth Lead, Content Lead, Designer, Reviewer) - Permission modifications and dynamic updates

User Stories: - *As a super admin, I want to define hierarchy so team responsibilities are clear. - As a super admin, I want to invite users and assign roles to ensure proper access control. - As a super admin, I want to modify permissions dynamically as team roles change.*

Acceptance Criteria: - Hierarchy is created and visualized. - Users receive invitations and can log in. - Permissions work according to roles. - Updates take effect immediately.

Step 2: Campaign Creation & Team Assignment

Objective: Allow Growth Managers/Heads to create campaigns, define timelines, assign responsibilities, and provide briefs.

Features: - Create new campaign (name, brief, platforms, objective, start/end dates) - Timeline & milestones with calendar view - Team assignment & responsibilities (task tagging per member) - Campaign metadata & tags - Notifications for assigned team members

User Stories: - *As a growth manager, I want to create campaigns with start/end dates. - As a growth head, I want to assign team members and responsibilities. - As a designer, I want to see my assigned tasks and deadlines.*

Acceptance Criteria: - Campaign created with correct details. - Timeline and milestones visible. - Team assignments and tasks properly tagged. - Notifications sent correctly.

Step 3: Automated Task Assignment & Workflow Tracking

Objective: Automatically assign tasks, track each stage, and ensure deadlines are visible.

Features: - Task templates & role tagging during profile setup - Predefined workflow stages: Scripting, Pre-Production, Production, Editing, Review, Approval, Launch - Automated task assignment based on roles - Timeline & stage tracking with Gantt-style calendar - Notifications for task assignments and deadlines - Universal workflow dashboard

User Stories: - *As a designer, I want tasks auto-assigned. - As a growth lead, I want to track all campaign stages. - As a content lead, I want notifications for task assignments and deadlines.*

Acceptance Criteria: - Tasks auto-assigned correctly. - Stages have deadlines, assignees, and statuses. - Notifications trigger correctly. - Dashboard reflects stage-wise progress.

Step 4: Creative Asset Upload & Stage Linking

Objective: Upload assets, tag them to campaigns and workflow stages, and maintain version control.

Features: - Asset upload (video, image, audio, GIF, bulk upload) - Stage & campaign linking - Metadata & tagging (platform, language, product line, owner) - Version control & history - Notifications for reviewers - Search & filter by campaign, stage, owner, tags

User Stories: - *As a designer, I want to upload assets and tag them. - As a content lead, I want to track assets linked to stages. - As a reviewer, I want notifications when assets are ready.*

Acceptance Criteria: - Assets linked correctly. - Version history maintained. - Notifications sent accurately. - Search and filters work.

Step 5: Review, Approval & Feedback Workflow

Objective: Ensure structured reviews, feedback collection, and stage approval tracking.

Features: - Stage-based review & approval - Inline feedback & comments - Status tracking (Pending, In Progress, Approved, Rework) - Notifications for reviewers and creators - Audit trail for all actions - Dashboard & reporting

User Stories: - *As a reviewer, I want to provide inline feedback and approve assets. - As a content lead, I want to track approvals and delays. - As a designer, I want notifications when feedback is given.*

Acceptance Criteria: - Review actions function correctly. - Feedback visible inline. - Status updates automatically. - Notifications trigger properly. - Audit trail logs all actions. - Dashboard reflects review status.

Step 6: Campaign Launch & Cross-Platform Deployment

Objective: Schedule and execute approved creatives across platforms and track deployment status.

Features: - Campaign launch scheduling with calendar view - Cross-platform deployment (Meta, Google, TikTok, YouTube) with manual fallback - Notifications for successful launches, failures, or missed deadlines - Launch dashboard with visual summary - Optional post-launch metrics collection (Phase 2)

User Stories: - *As a growth manager, I want to schedule launches across platforms. - As a content lead, I want to see deployed campaigns and attention areas. - As a designer, I want notifications when my creative is live.*

Acceptance Criteria: - Campaigns scheduled correctly. - Creatives deployed successfully. - Notifications trigger properly. - Launch dashboard accurate. - Post-launch metrics captured correctly.

Step 7: Performance Analytics & Insights

Objective: Provide actionable insights on creative and campaign performance.

Features: - Creative-level analytics (CTR, impressions, engagement, conversions) - Campaign-level metrics aggregation - Workflow efficiency metrics - Custom filters & drill-downs - Report generation & export (CSV, PDF, scheduled) - Predictive & AI insights (Phase 2) - Alerts for underperforming creatives or campaigns

User Stories: - *As a growth manager, I want to identify top-performing creatives. - As a content lead, I want stage-wise bottlenecks. - As a marketing head, I want dashboards and reports.*

Acceptance Criteria: - Metrics accurate and visualized. - Filters and drill-downs work. - Reports export correctly. - Alerts trigger properly. - Predictive insights (Phase 2) accurate.

Step 8: Notifications, Alerts & Collaboration

Objective: Keep teams informed, ensure accountability, and foster collaboration.

Features: - Real-time notifications (task assignments, stage transitions, asset uploads, approvals, feedback) - Alerts & reminders (deadlines, overdue tasks, bottlenecks) - Collaboration tools (inline comments, threaded discussions, tagging) - Dashboard indicators for pending/urgent items - Audit & history logs

User Stories: - *As a designer, I want notifications for task assignments. - As a content lead, I want reminders for pending approvals. - As a growth manager, I want centralized visibility of all comments and notifications.*

Acceptance Criteria: - Notifications and alerts trigger correctly. - Comments and threads function and visible to relevant users. - Dashboard indicators accurate. - Audit logs capture all collaborative actions.

Step 9: Storage Management & Asset Lifecycle

Objective: Efficiently manage creative assets, control storage costs, and maintain organization.

Features: - Tiered storage plans per team or account - Asset retention & purging (automatic bimonthly, manual override) - Asset lifecycle tracking (Draft → Submitted → Approved → Archived → Deleted) - Notifications & alerts for storage thresholds and upcoming purges - Search & retrieval across statuses - Cost monitoring dashboards

User Stories: - *As a content lead, I want to know assets nearing purge. - As a designer, I want quick access to active/archived assets. - As an admin, I want to monitor storage usage and costs.*

Acceptance Criteria: - Tiered storage assigned correctly. - Automatic purging occurs per rules. - Notifications trigger properly. - Search retrieves assets accurately. - Version history maintained. - Cost dashboards accurate.

Step 10: User Management & Permissions

Objective: Control access and roles within the platform.

Features: - Role-based access control (Super Admin, Admin, Growth Lead, Content Lead, Designer, Reviewer) - User onboarding & offboarding - Permission customization per module or campaign

User Stories: - *As a super admin, I want to assign roles and permissions. - As an admin, I want to modify roles dynamically.*

Acceptance Criteria: - Roles and permissions function correctly. - Users perform actions only within permitted scope. - Role updates take effect immediately.

Step 11: Standard Campaign Structure

Objective: Define a universal campaign template adopted across the organization.

Features: - Predefined stages: Ideation → Scripting → Pre-Production → Production → Editing → Review → Approval → Launch → Post-Launch Analysis - Template fields: Campaign Name, Brief, Target Platforms, Language, Region, Objective, Priority, optional tags - Task & stage auto-assignment per role - Customizable variations for specific campaigns - Cross-campaign consistency in naming, stages, and reporting

User Stories: - *As a growth lead, I want campaigns to follow a standard structure. - As a content lead, I want task assignments and deadlines auto-populated. - As a designer/reviewer, I want clear responsibilities per stage.*

Acceptance Criteria: - Template available for new campaigns. - Default stages, tasks, assignments populate correctly. - Custom overrides allowed. - Dashboards and reports respect structure. - Notifications and timelines align with template stages.

Step 12: Reporting, Dashboards & Insights Consolidation

Objective: Provide comprehensive visibility into campaign performance, workflow efficiency, and team productivity.

Features: - Executive dashboard with high-level view - Creative & campaign performance analytics - Workflow efficiency metrics - Custom filters & drill-downs - Report generation & export (CSV, PDF, scheduled) - Predictive & AI insights (Phase 2) - Alerts & notifications for underperformance or delays

User Stories: *- As a growth manager, I want a real-time dashboard to monitor campaigns. - As a marketing head, I want standardized and custom reports. - As a content lead, I want predictive insights for campaign prioritization.*

Acceptance Criteria: - Dashboards show accurate metrics. - Filters and drill-downs function correctly. - Reports export and schedule properly. - Predictive insights accurate. - Alerts trigger correctly.

End of PRD - CreateOS Step-by-Step Detailed Document