CreateOS - Phase 1

Step-by-Step Weekly Flow

This document provides a clear, step-by-step execution plan for Phase 1 of CreateOS. The plan is designed in plain language for all team members, focusing on what users will see and do each week. The goal is to build a sustainable foundation before adding advanced features in later phases.

# Week 1 — Foundation: Set up people and roles

* Goal: Make the company structure and user accounts so people can log in and have the right access.
* Task 1: Kickoff meeting to decide departments and assign sample users per role.
* Task 2: Create department tree (e.g., Growth, Content, Design).
* Task 3: Define roles (Designer, Reviewer, Growth Lead) with simple permissions.
* Task 4: Invite users via email → they log in and land on a dashboard.
* Task 5: Test logins for each role to ensure correct access.
* Deliverables: Org tree, Roles page, Invite flow, User dashboard.
* Acceptance: Users onboard successfully and only see their permitted options.

# Week 2 — Campaigns: Create and standardize campaigns

* Goal: Allow Growth Leads to create campaigns and auto-generate standard tasks.
* Task 1: Growth Lead clicks 'New Campaign' → fills details (name, brief, platforms, dates).
* Task 2: Pick a campaign template with predefined stages (Ideation → Launch).
* Task 3: Auto-create tasks and assign them to roles.
* Task 4: Growth Lead assigns actual people and views timeline on calendar.
* Task 5: Test by creating a sample campaign.
* Deliverables: Campaign form, Campaign detail page, Calendar view.
* Acceptance: Campaigns auto-populate stages, tasks are visible and editable.

# Week 3 — Workflows & Collaboration: Upload and review

* Goal: Designers upload files, reviewers give feedback, track versions.
* Task 1: Confirm each stage’s expected output (e.g., final video for Editing stage).
* Task 2: Designer uploads an asset, tags platform/language.
* Task 3: System creates version history, allows preview.
* Task 4: Reviewer adds inline feedback, approves or requests changes.
* Task 5: Designer re-uploads, reviewer approves final version.
* Deliverables: Upload modal, Asset list, Version history, Review comments.
* Acceptance: Review loop works end-to-end with status tracking.

# Week 4 — Launch & Notifications

* Goal: Growth Leads schedule launches and track them with reminders.
* Task 1: Growth Lead schedules launch with date/time.
* Task 2: Manual 'Mark as Launched' button to confirm posting.
* Task 3: System sends reminders 24h before and alerts if overdue.
* Task 4: Launch log shows who launched, when, and status.
* Task 5: Full demo of create → upload → review → launch cycle.
* Deliverables: Launch scheduler, Confirmation modal, Launch log.
* Acceptance: Campaigns can be scheduled, marked launched, and tracked.

# Simple End-to-End Story

Growth Lead creates a campaign and assigns a Designer. The Designer uploads a draft asset and tags it for Instagram. A Reviewer gets a notification, opens the asset, leaves inline comments requesting edits. The Designer uploads a new version, reviewer approves, and the Growth Lead schedules the launch. On the launch Task the Growth Lead clicks 'Mark as Launched' — the team gets a confirmation and the launch is recorded in the log.

# Checklist to Reduce Confusion

* Always add at least one test user per role in Week 1.
* Use short, clear campaign names (e.g., 'May Sale — Instagram Stories').
* Require Designers to fill platform + language tags on upload.
* Make approval explicit: Reviewer must click 'Approve' to mark asset final.

# Risks & Fixes

* Users can’t find tasks → Fix: Show 'My Tasks' card on dashboard.
* Missing tags on upload → Fix: Make tags required fields.
* People forget to approve → Fix: Daily digest email for pending approvals.