Workflow 1: Initial meeting prep (leave for now)

Workflow 2: Client onboarding - Initial meeting conversation recording and transcription

* Task 1: Record audio
* Task 2: Accurate transcription
* Task 3: Pertinent information extraction and storage
  + Overall transcription accuracy (conventional metric)
  + regulatory (vulnerability, AML, suitability / risk tolerance)
  + tax (ISA use, IHT, income mix)
  + disclosure check – fees, unbiased / tied agent, complaints channel
* Task 4: Identify gaps / missing info

Workflow 3: IFA query

* Task 1: Analyse query to determine intent
* Task 2: Identify tasks needed
* Task 3: Identify agents
* Task 5: Create prompt / instruction per agent
* Task 4: Instruct agents
* Task 6: Parse, evaluate results
* Task 7: Assemble and return answer

Workflow 4: