Version -1: Loom

Nomenclature Clarification:

Some of the terminology is mingled up so let's clarify that before tomorrow if possible.

For example here:

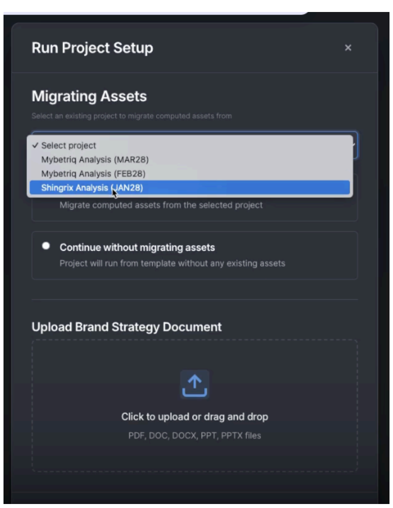
The customer creates their **brand strategy**, and our **brand strategy agent** helps **operationalize** their brand strategy through our **brand strategy experimentation platform** (if you want to call it that).

In terms of the nomenclature, they upload **brand strategy content,** we extract the **brand strategy summary**, and we **translate it** into a **simulation project template** in that order.

This order impacts the workflow - see below.

Workflow Clarity:

- **Prioritize uploads as the true entry point.**
  Right now, the flow starts at "Create my brand strategy," that assumes a project already exists (ie. **Drop down select project**). In reality, the *uploads* come first — they are what populate everything downstream.
  → Suggestion: Make "Upload & Review" the first step in the UI, clearly separated and prioritized visually at the top.

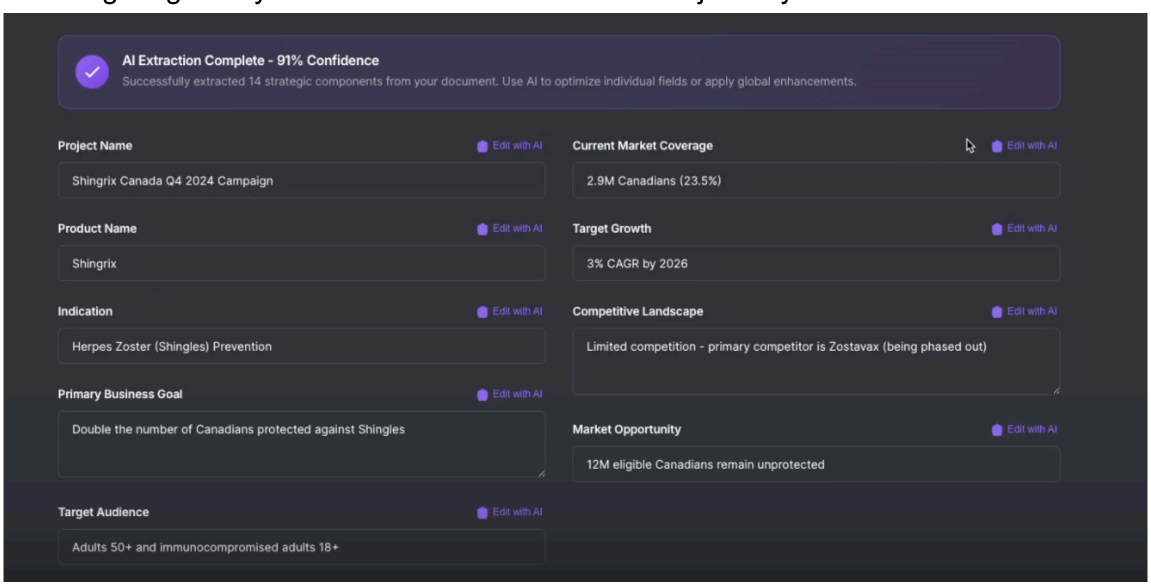


- **Think of it as linear steps.**
  Users should experience the workflow as a step process:

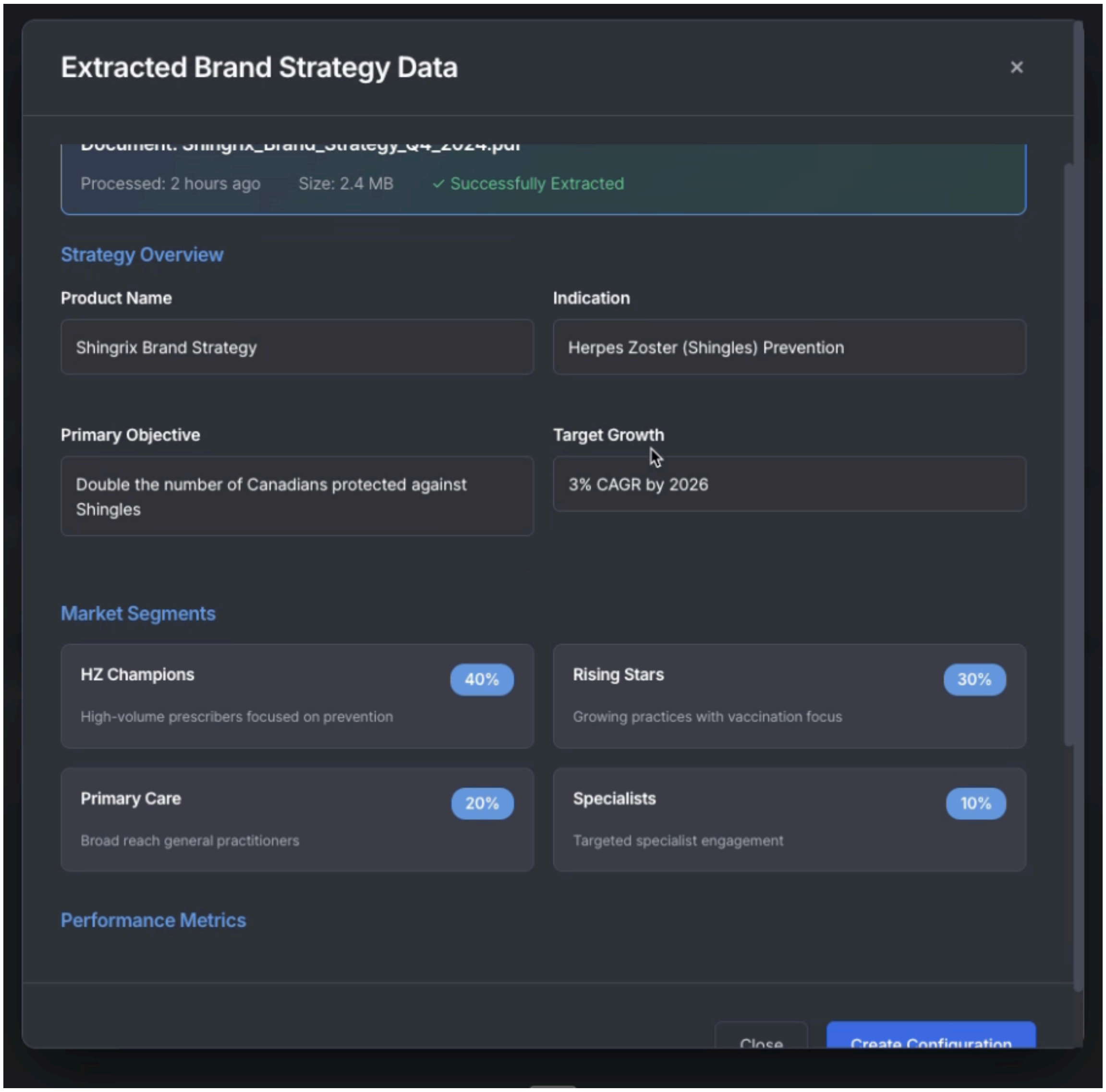
  1. User Uploads files → Extract strategy content
  2. User Reviews extracted content
  3. Translate strategy content summary into configuration
  4. Run simulations
  5. Validate configuration outcomes with simulation reports (Overlap analysis, curation simulation)
  6. Deploy validated project template (the configured strategy approved after the simulation report is reviewed)
  7. See outcome of deployed strategy in field via reports (adherance, ROI)

- **Think of it as having two users and how we can accommodate that in the work flow - Pharma user and Internal User.**

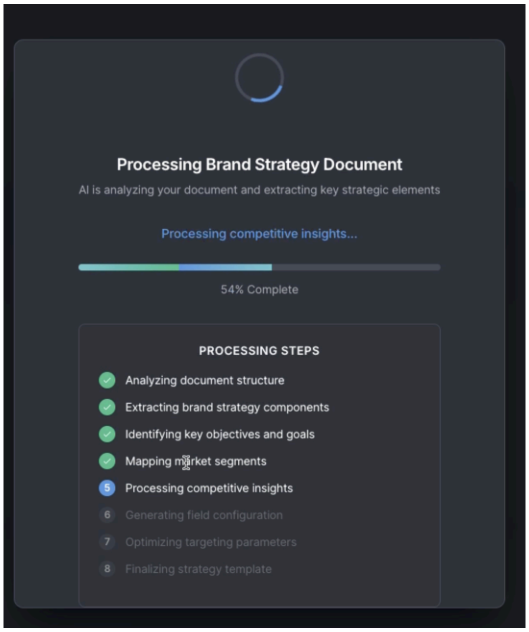
  The first human step should be: “Did the system extract all the information needed to populate the strategy template?” This step should be more isolated to reduce any complexity in the pharma user having to navigate the rest of this system - if we can have the upload + review be super no brainer for anyone ie. more like a wizard and then let the navigating the system be more of an internal user journey.



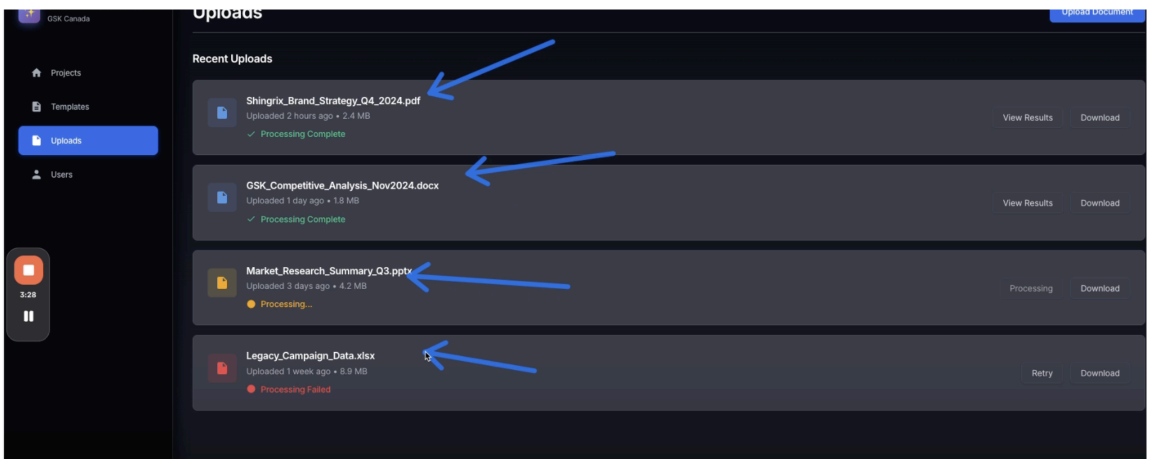
- There are some redundancies in the current workflow for example the above extracted info feels similar to the below. I prefer the below better and I think layering in the “what AI to use to process” for the internal user would be nice in this area. The pharma user can see this or something even more summarized like what Midori drafted. The drop down of which AI to use (fastest, best qualit etc) - where it sits right now made me a bit confused and thought it was part of generating downstream assets after the project template is deployed.



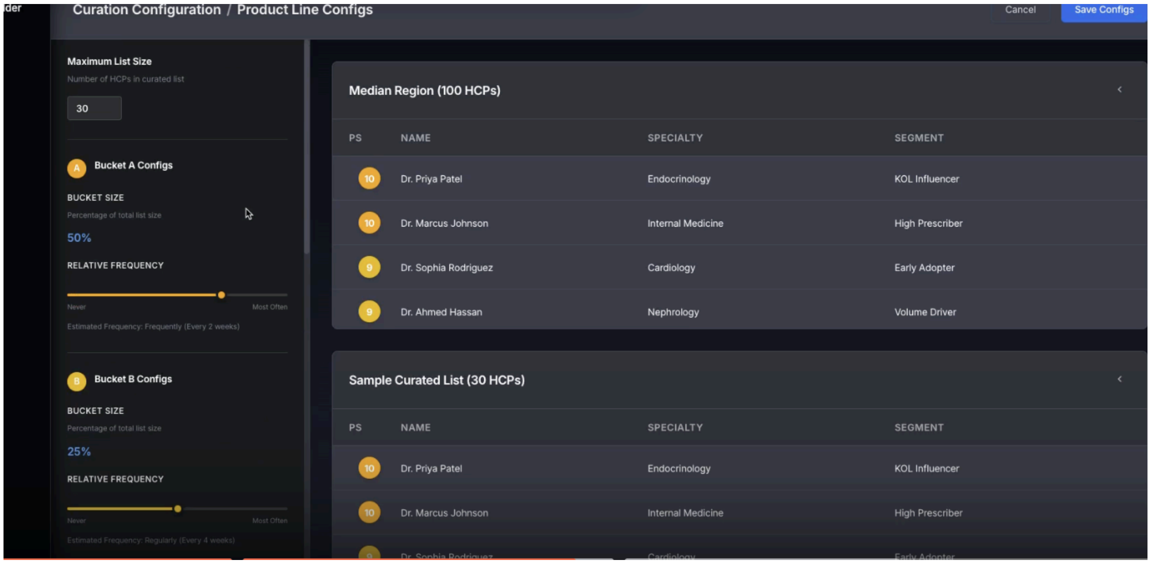
- **Transparent Progress - I like this very much keep this**



- This is also a nice screen - I see this as part of an internal user's journey where they can see what customer uploaded and check the original docs if ever needed



- **Translate language → configuration.**
  After review, we need a clear step where the extracted strategy elements (objectives, segments, tactics, leading indicators, etc.) are mapped into the system's configuration. This is where BAs validate alignment. This current sits here (below) if i am understanding - I can help make this a bit cleaner so can leave this as is for now.



- **Support iteration via simulation.**
  Right now, the flow ends with creating the template. But the real value comes after that — simulating/experimenting, showing overlap analysis, and producing curation reports. For full e2e will need to add steps where users can “Run & Review Simulation” before moving to deployment. See the full e2e workflow at the top.