### **Tech Stack**

| **Tool** | **Purpose** | **Primary Responsibilities** |
| --- | --- | --- |
| **MCP (Claude)** | Advanced processing, analysis, and deliverable generation. | - Metadata extraction  - Timeline creation  - Pattern recognition  - Report generation. |
| **Gemini Deep Research** | Cross-document analysis and in-depth exploration. | - Entity relationship mapping  - Cross-referencing key insights  - Identifying discrepancies. |
| **NotebookLM** | Validation and alignment of outputs with original documents. | - Detailed source validation  - Context-aware QA  - Generating supporting evidence for insights. |
| **ChatGPT** | Formatting and final deliverable enhancement. | - Polish draft outputs from MCP  - Create client-facing summaries, FAQs, and reports. |
| **Zapier** | Lightweight workflow automation and client notifications. | - Notifications (e.g., upload confirmation)  - Error handling  - Client communication triggers. |
| **Google Drive** | Primary file storage and versioning. | - Secure file storage  - Folder organization for uploads and deliverables. |
| **Airtable** | Workflow and status tracking. | - Track project progress  - Manage client details  - Maintain audit logs for deliverables. |

### **Workflow Stages**

#### **Stage 1: Client File Submission**

**Objective**: Provide a secure, branded interface for clients to upload files and initiate the workflow.

**User Story**:  
As a client, I want to upload my files securely and receive confirmation so I know my documents are being handled efficiently.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Client uploads files | Squarespace → File Request Pro | Clients use a branded interface to upload documents, tagging optional metadata (e.g., descriptions). |
| Save files to Drive | File Request Pro → Google Drive | Files are stored securely in Google Drive folders (e.g., Client\_X/Raw\_Documents). |
| Log uploads | Zapier → Airtable | Zapier logs file metadata in Airtable (e.g., upload time, client name) and updates the status to "Uploaded." |
| Notify client | Zapier → Email | Clients receive an automated email confirming successful upload. |

#### **Stage 2: File Organization and Metadata Extraction**

**Objective**: Organize raw files into categories and extract key metadata for structured processing.

**User Story**:  
As a team member, I want files automatically organized and key metadata extracted so I can start analysis immediately.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Organize files | MCP → Google Drive | MCP categorizes and tags files (e.g., "Emails," "Contracts") based on content. |
| Extract metadata | MCP → Airtable | MCP extracts key metadata (e.g., dates, parties, payment terms) and updates records in Airtable. |
| Cross-check metadata | Gemini → Airtable | Gemini validates metadata consistency across documents and flags anomalies. |
| Update file status | Zapier → Airtable | Status is updated in Airtable to "Organized" after MCP categorization and metadata extraction. |

#### **Stage 3: Document Analysis and Insight Generation**

**Objective**: Identify patterns, generate insights, and map relationships across documents.

**User Story**:  
As an analyst, I want to see patterns, timelines, and relationships quickly so I can focus on building strategies.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Summarize documents | MCP → Airtable | MCP generates summaries for each document and links them to the corresponding metadata. |
| Identify patterns | Gemini → Airtable | Gemini analyzes cross-document relationships (e.g., communication patterns, financial dependencies). |
| Relationship mapping | Gemini → Airtable | Gemini visualizes relationships and discrepancies (e.g., conflicting dates or terms). |
| Enhance insights | ChatGPT → Airtable | ChatGPT synthesizes insights into polished summaries, FAQs, or timelines. |

#### **Stage 4: Validation and QA**

**Objective**: Ensure all summaries, timelines, and insights are accurate and aligned with source materials.

**User Story**:  
As a quality reviewer, I want tools to validate outputs and flag discrepancies so deliverables are error-free.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Validate outputs | NotebookLM → Airtable | NotebookLM verifies that summaries, timelines, and insights align with the original documents. |
| Identify inconsistencies | NotebookLM → Airtable | Flags discrepancies between generated content and source materials for further review. |
| QA enhancements | ChatGPT → Airtable | ChatGPT refines summaries post-validation for client-facing presentation. |
| Log validation status | Airtable | Validation results are logged in Airtable, marking summaries as "Validated" or "Needs Review." |

#### **Stage 5: Deliverable Generation and Sharing**

**Objective**: Generate polished reports and deliverables, notify clients, and track completion.

**User Story**:  
As a client, I want clear, professional deliverables sent to me promptly so I can focus on strategy.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Generate reports | MCP → Google Drive | MCP compiles deliverables (e.g., reports, FAQs, timelines) and saves them to the client’s folder. |
| Refine reports | ChatGPT → Google Drive | ChatGPT enhances the final outputs for readability and presentation. |
| Notify clients | Zapier → Email | Clients receive an email with links to the final deliverables. |
| Log deliverables | Airtable | Airtable tracks the completion of deliverables and links to Google Drive for audit purposes. |