

## C-Levels AI Umbrella – Developer Brief

### ⌚ Vision

One unified AI ecosystem on **C-Levels.com**, with two levels of interaction:

1. **Umbrella AI (“Monica”)** → a sales & routing AI that makes the first contact, builds trust, and directs users to B2C or B2B.
2. **3 Specialized Sub-AIs (each with its own KB + RAG pipeline):**
  -  Wellbeing
  -  Legal
  -  Concierge

This avoids maintaining separate platforms (e.g., AvoLine.ro) and creates a consistent, WordPress-integrated experience.

### ▣ Current Implementation (Already Integrated)

From the existing setup (GPT-4o-mini, WordPress plugin):

- Chatbot widget already integrated in WordPress.
- Branding (C-Levels colors, bilingual RO/EN).
- GDPR consent + fallback to human (email/CRM).
- Analytics (chat opens, messages, bookings).
- RAG pipeline configured (not fully active in the tested version).
- Knowledge Base ingestion (CSV/PDF/manual).
- Fuzzy Matching promised in the latest update.
- CTA buttons (Book Now, Directions, Call Concierge).

⌚ This means the **technical foundation for a concierge RAG AI is already in place.**

### ▣ Next Step: AI Umbrella

#### 1) Umbrella AI (Monica)

- **Role:** first conversational layer (sales & routing).
- **Tone:** warm, professional, differentiated from generic ChatGPT.
- **Flow:**
  - Intro: “Hi, I’m Monica, your C-Levels digital concierge...”
  - Ask: “Are you looking for solutions for yourself (B2C) or for your company (B2B)?”
  - B2C: 3 options (Tell me more / Go to landing / Packages).
  - B2B: 3 options (Tell me more / Go to landing / Packages).
  - “Tell me more”: micro-pitches (7–8 subtopics).
  - End: CTA → packages, landing, or call with team.

## 2) Specialized Sub-AIs

### Wellbeing AI

- KB: lifestyle/stress content curated by psychologists.
- Guardrails: no therapy or medical advice; only general lifestyle answers; always show disclaimer.
- Escalation: “Chat with Psychologist” / “Book a Session”.

### Legal AI

- KB: Romanian Labor Code, Civil Code, GDPR, OUGs.
- RAG: include article + paragraph + URL in citations.
- Guardrails: if confidence < threshold → “Nu am context suficient.”
- Escalation: “Chat with Lawyer” / “Schedule Consultation”.
- This is essentially the **AvoLine MVP transformed into the Legal module for C-Levels.**

### Concierge AI

- KB: C-Levels partner database (restaurants, hotels, transport, events).
- Output: cards with image, address, phone, and CTA buttons.

- Escalation: “Call Concierge” / request callback.

### 3) Backend Setup

- Vector DB with 3 namespaces: wellbeing\_ro, legal\_ro, concierge\_ro.
- Fuzzy Matching enabled.
- Confidence threshold: <0.6 → fallback + human CTA.
- Conversation logging: category, query, confidence, escalation.

### 4) Admin Dashboard

- KB management per category (upload/update CSV/PDF).
- Analytics by category (% AI-handled vs escalated).
- Export conversations (CSV/JSON).

### 5) Compliance

- Disclaimer on every answer (RO + EN).
- GDPR → anonymized logs, consent banner.
- Standard notice: “This is AI-generated information, not professional advice.”

### Deliverables

1. Updated Monica AI widget with B2C/B2B routing.
2. 3 separate KBs + RAG pipelines (Wellbeing, Legal, Concierge).
3. CTA buttons under every AI response.
4. Extended dashboard with per-category analytics.
5. Human escalation paths (psychologist, lawyer, concierge).