Win Notes DB – High-Level Design Document

# 1. Overview

The Win Notes DB is an internal application designed to centralize, structure, and make searchable the win notes shared across our sales organization. The tool serves as a knowledge base for current and future account executives (AEs), solutions engineers (SEs), and adjacent teams.

# 2. Goals and Objectives

• Centralized access to historical win data

• Enhanced discoverability through search and tagging

• Improved onboarding and enablement of AEs and SEs

• Efficient insights into patterns and tactics across successful deals

• Scalable and secure foundation for future analytics or AI-driven summarization

# 3. Primary Users

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| --- | --- |
| Role | Description |
| Account Executives | Contribute and consume win notes |
| Solutions Engineers | Contribute detailed technical win context |
| Enablement & RevOps | Use insights to inform playbooks/training |
| Leadership | Discover trends across geographies/segments |
| Broader Org (View) | Read-only access for other internal stakeholders |

# 4. Data Sources

Slack: Primary source via #win-alerts channel

Optional/Future: Salesforce integration depending on access

# 5. Functional Requirements

## 5.1 Data Ingestion

• Real-time or scheduled polling of #win-alerts

• Slack API integration via bot or webhook

• Basic NLP-based chunking of message content

• Metadata extraction (date, users, tags, links)

## 5.2 Data Normalization

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| --- | --- |
| Field | Description |
| Customer Name | Name of the customer or account |
| Customer Profile | Industry, region, size, and brief context of the customer organization |
| Business Challenge | The customer’s pain points or the problem they were trying to solve |
| Why Nutanix, Why Now | Triggers for the deal: why the customer chose Nutanix and what made the timing right |
| Our Solution | Technical and business solution proposed, including Nutanix products used |
| Business Impact | Quantitative or qualitative benefits delivered |
| Customer Outcomes | Final measurable outcomes after implementation |
| Quotes from the Customer | Direct quotes or paraphrased feedback from customer stakeholders |
| Learnings & Takeaways | Internal reflections: what worked, what didn’t, unexpected challenges, etc. |
| Competitive Solutions | Who we competed against and what alternatives were considered |
| Tactics / Strategy Summary | What unique strategies, plays, or value props were leveraged |
| Power of Partnership | Role of channel partners, alliances, or SI involvement |
| SE / AE Involved | Names or aliases of team members contributing to the win |
| Products Involved | Nutanix offerings mentioned |
| Region / Geography | Customer region for segmentation and GTM insights |
| Date | When the win was announced or captured |
| Tags / Keywords | Free-form tags for flexible filtering |
| Full Source Text | The original unstructured content used to generate this entry |

## 5.3 Application Features

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| --- | --- |
| Feature | Description |
| Search & Filter | Search win notes by AE, SE, tactic, product, region, keyword, etc. |
| Note Detail View | View full win note, extracted metadata, and original source text |
| Admin Tools | Edit fields, correct extractions, flag entries, and manage access |
| Export / Share | Export filtered results as CSV or share internal links |
| User Authentication | SSO-based login with role-based access control |
| Responsive UI | Optimized interface for desktop and mobile usage |

# 6. Architecture

The architecture for the Win Notes DB is designed for flexibility, internal hosting, and modular growth. It emphasizes local LLM inferencing using Nutanix Enterprise AI and a fully containerized deployment model.

## 6.1 Architecture Overview

Slack / External Sources  
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 N8N Workflow Orchestrator  
 (Ingestion + LLM Processing)  
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Internal LLM Inferencing via  
Nutanix Enterprise AI (LLaMA 3 13B PS)  
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 Structured Output → PostgreSQL  
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 ▼  
Kubernetes-hosted Frontend UI + Backend APIs

## 6.2 Component Breakdown

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| --- | --- |
| Component | Technology / Platform |
| Ingestion Layer | N8N (self-hosted) workflows integrating with Slack APIs and other external inputs |
| LLM Processing | Nutanix Enterprise AI using LLaMA 3 13B PS for metadata extraction, summarization, etc. |
| Orchestration Logic | N8N will manage the pipeline: trigger → extract → LLM call → normalize → DB write |
| LLM Hosting | Internal inference via Nutanix Enterprise AI on GPU infrastructure |
| Database | PostgreSQL, containerized and optionally running on Kubernetes (TBD final architecture) |
| Backend API | Node.js or FastAPI container deployed on Kubernetes |
| Frontend UI | React.js + Tailwind or equivalent, hosted in Kubernetes |
| Authentication | Google SSO or Auth0 / Clerk-based OAuth |

# 7. Security & Access Control

The Win Notes DB will enforce strict role-based access to maintain data integrity and control over the structured win content.

## 7.1 Authentication

• SSO-based login (Google OAuth or enterprise IdP)  
• All users must authenticate to access the application

## 7.2 Authorization & Roles

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| --- | --- |
| Role | Permissions |
| Admin | Full access: view, edit, correct, manage tags, and oversee submissions |
| Standard User (SEs, AEs, others) | View-only access; no ability to edit or delete content |

## 7.3 Error Reporting Workflow

To ensure data quality without exposing write permissions:  
  
• Each entry in the UI will include a “Flag Issue” button  
• Users can submit a short note describing what’s incorrect or missing  
• The flagged entry and note are routed to the Platform Administrator  
• Admins will review and make necessary corrections through the admin interface  
  
All changes are logged to preserve an audit trail and maintain transparency for downstream systems or analytics.

# 8. Performance & Scalability

The system is designed to be highly responsive and able to scale with user growth.  
  
• Sub-second search and query response times  
• Horizontal scalability to support 100–10,000+ concurrent users  
• Modular Kubernetes-based deployment for backend and frontend  
• Efficient NLP pipelines using internal Nutanix-hosted inferencing

# 9. Phased Development Plan

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| --- | --- |
| Phase | Deliverables |
| Phase 1 | Slack ingestion + basic UI + search/filter |
| Phase 2 | Tagging, metadata extraction, user auth |
| Phase 3 | GPT summarization, export features, SE/AE usage dashboard |
| Phase 4 | Optional SFDC integration, advanced insights, AI assistance |

# 10. Future Considerations

• GPT-based Q&A (e.g., “Show me how we’ve beaten Competitor X in Healthcare”)

• Insights dashboard (top win tactics, win rate by region)

• Integration into SE enablement platforms or LMS

• Support for multi-source ingestion (email, Gong, Salesforce notes)