

Project Emily - Proposal Overview

Overview

Project Emily is a 6-month AI assistant development plan designed to embed artificial intelligence into your daily operations. The assistant will be accessible via a Chrome Extension and powered by a multi-model LLM backend, handling everything from SOP generation to onboarding, objection handling, internal FAQ answering, and more. This proposal outlines the scope and value of the work, broken down by feature and timeline.

Development Timeline (6 Months)

Each month focuses on a specific set of features to ensure smooth progression, scalability, and internal adoption:

- **Month 1:** Infrastructure Setup (Supabase, Pinecone, Redis, Vercel AI SDK, Admin Portal setup, Chrome Extension scaffold)
- **Month 2:** Chat UI Build + Agent Switching + Core Memory
- **Month 3:** SOP Generator, FAQ Agent, Document Ingest + Roleplay Training
- **Month 4:** Triggers, Workflow Automation, and Memory Controls
- **Month 5:** Admin UX, Reporting, Visual Polish, and Analytics
- **Month 6:** Testing, Onboarding, Internal Rollout and Launch

Key Features

- Chrome Extension Chat UI
- Admin Portal for prompt control, SOP updates, and user management
- SOP Generator
- Objection Handling Scripts
- Roleplay Training Simulations
- Internal FAQ Agent with doc search (Google Drive/Dropbox)
- Memory System: Redis (short-term), Pinecone (long-term)
- Tagged Triggers & Inline Actions

Feature List Break Down Month x Month

● **Month 1: Core Setup & Architecture**

- Initialise Supabase (auth, roles, logs, chat sessions)
- Set up Redis (short-term memory) & Pinecone (long-term memory)
- Choose embedding model + formatting logic for Pinecone
- Set up Make.com or N8N instance
- Set up Chrome Extension scaffold (basic popup + router)
- Scaffold Admin Portal (Next.js, roles, basic dashboard)
- Set up Vercel AI SDK (OpenAI, Gemini, Claude, fallback routing)

■ **Month 2: Chat UI + Multi-Agent Routing** | 🧠 *Core chat system + agent switching* |

- Build Chrome Extension chat window (UI, loading states, feedback)
 - Add agent switching UI (e.g. dropdown tabs for Emily, Max, etc.)
 - Implement system prompts per agent (stored + editable in Supabase)
 - Hook up LLM chat flow with short/long-term memory recall
 - Implement streaming/chat completion output handling
 - Log chat messages to Supabase by user, assistant, time
 - Start internal testing of multi-agent memory separation
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● **Month 3: Core Assistant Features (SOPs, FAQs, Roleplay)** | 📄 *Actual business-use features*

- **SOP Generator** live (prompt > generate > edit > store > recall)
 - **FAQ Agent** connected to document embeddings (policies, guides)
 - **Roleplay Generator** (e.g. sales objection simulation generator)
 - Google Drive/Dropbox integration for doc upload & search
 - Pinecone ingestion tool: vectorise & tag uploaded documents
 - Admin Portal: Create/update SOPs, FAQs, prompts, and test memory entries
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● **Month 4: Smart Memory + Triggers + Workflow Hooks** | 📁 *Advanced memory + task triggers*

- Memory Management Layer: tag entries, approve/reject memory saves
 - Implement inline “Approve/Decline” chat actions
 - Tagging logic: e.g. tag = “Onboarding SOP” → route to Monday.com via Make/N8N
 - Create agent-specific namespaces in Pinecone for memory separation
 - Build document preview UI in Admin Panel
 - Staff-specific permissions (who can edit prompts/memory/tasks)
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● **Month 5: Admin Portal Expansion + UX Polish** | 🛠️ *Control, branding, performance*

- Admin Portal: advanced search/filter chat logs
 - Per-agent analytics dashboard: usage, chat volume, etc
 - Add SOP/FAQ editing history + last modified by tracking
 - Add branded chat elements (icons, colours per assistant)
 - Add ability to pause/disable specific assistants per team
 - Error monitoring & fallback handling (e.g. if LLM fails, notify Admin)
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● **Month 6: QA, Team Testing, Internal Rollout** | 🚀 *Final testing, polish, and launch*

- Conduct full UAT (user acceptance testing) with 3–5 users
- Gather and implement feedback into prompt logic / memory thresholds
- UX polish: loading animations, session restart, scroll lock
- Create onboarding guide (Loom video + docs)
- Finalise SOP/FAQ library from existing business files
- Deploy Chrome Extension internally via GSuite or .crx