ARCBOUND / ARCBASE

OS Rebuild Outline

Architecture, timeline, and functional spec — pulled from the May 17 walkthrough with Vaibhav

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PURPOSE OF THIS DOCUMENT

A working spec for rebuilding the Arcbound / ArcBase OS from scratch. The system splits cleanly into two surfaces — the internal admin layer (where the Arcbound team trains and manages each client's brand agent) and the client-facing self-serve layer (where the client moves through a linear, gamified journey from kickoff to delivered website). Each section below maps a real function shown in the walkthrough to the inputs it consumes, the logic it runs, and the output it produces.

1. System Overview

Two surfaces, one shared brain

- **Admin / internal OS —** Arcbound team uses it to create clients, run handoffs, ingest transcripts, train the per-client brand agent, generate brand strategy, and produce graphics. Functional, not designed for client eyes.
- **Client / self-serve OS ("ArcBase") —** Polished, linear dashboard. Single CTA on screen at any moment. Progress bar, gamified milestones, save-and-resume. Client never sees the back-end training surface.
- **Shared brand agent —** Each client has a custom AI agent trained on their ingested sources. Every output (brand DNA, strategy, color palette, fonts, content, graphics) is grounded in source quotes and cites where it pulled from. No hallucinated outputs.

Build stack referenced in the meeting

- Lovable for the OS shell and agent wiring.
- Claude for feature-level app builds and brand guidelines application.
- ~30 integrations wired in: ChatGPT, Claude, Slack, Granola, Klaviyo, Notion, HubSpot, Substack, YouTube, Gmail (OAuth), Google Drive, Fathom (API key now, OAuth target), Instagram, LinkedIn, newsletter sources.
- Image generation via ChatGPT image 2.0 (logos) and Gemini fallback (legacy graphic compositing — now mostly retired since ChatGPT improved).
- HeyGen flagged for future video clone generation.

2. Admin / Internal OS

This is the surface the Arcbound team operates on. It is intentionally dense because it doubles as the training console for each client's agent.

2.1 Client Creation

The system entry point. Two paths in: manual creation by the Arcbound team, or auto-creation when a client applies through the self-serve flow.

INPUTS

- Company name, primary email, phone.
- LinkedIn profile URL, website URL, Instagram, newsletter.
- Other sources (open field — book transcripts, podcast feeds, etc.).

FUTURE STATE

- Email-to-account lookup that auto-pulls associated social accounts so the team rarely has to enter anything manually.
- Sales-system connection so applicants land here pre-populated.

2.2 Handoff Workflow

Once a client is created, the handoff feature converts raw inputs into a structured client profile.

GENERATES

- Client contract and resource links.
- About the client — narrative summary.
- Links and handles, consolidated.
- Initial brand DNA seed, mapped against client goals.
- Service package summary.
- Why they chose Arcbound.
- Upsell opportunities, watchouts, values, communication preferences.

Notes: Early client records pre-date the handoff feature and don't populate this surface. New clients should always be created post-handoff-build.

2.3 Transcript Ingestion + Meeting Analysis

Every meeting transcript (kickoff, brand discovery, brand strategy, etc.) is uploaded and analyzed individually. Each analysis feeds the brand agent.

PER-MEETING OUTPUT

- Topical extraction tied to the brand agent training schema.
- Quote-level source-tagging — every downstream claim cites the originating transcript line.

2.4 Brand DNA Build

The synthesized output of all ingested sources. Grounded — every section is justified by quoted source material.

SECTIONS PRODUCED

- Brand essence.
- Mission, vision, narrative identity, origin story.
- Founder profile, brand archetype, emotional core, core values.
- Positioning and differentiation.
- Target audiences (primary + secondary), pain points, aspirations, audience journey.
- Voice and tone, digital tone of voice.
- Brand strategy + brand archetype.
- Content strategy: mediums, tensions, visual directions.
- Color system seed, competitive landscape, key quotes.

This view is internal-only — it exists to feed the per-client agent. The client never sees this surface directly.

2.5 Per-Client Custom Agent

Each client has a dedicated agent. The OS routes prompts to that agent, which has the full brand DNA, transcripts, and source library available.

CAPABILITIES

- Answer brand/audience questions with cited sources beneath every response.
- Accept image inputs.
- Web-connected.
- Exportable — data can be lifted into Claude or ChatGPT externally.
- Long-form answers preferred during training; can be truncated in production.

2.6 Visual Discovery (Admin Walkthrough)

The structured live walkthrough Eli currently runs with each client. The OS is being trained to deliver this end-to-end without him.

SEQUENCE

- **Opening framing —** the visual identity sits at the intersection of brand ethos, color theory, neuroaesthetics, target-audience response, and goals. 50-millisecond first-impression principle.
- **Color theory primer —** evolutionary basis for color associations (greens/blues = calm, reds = danger), then granular distinctions (navy vs. royal vs. sky; burgundy vs. crimson).
- **Typography primer —** serif lineage (heritage, authority — Louis Vuitton example), sans-serif modernity (Uber, Lyft, Airbnb). On-screen readability bias toward sans-serif for body.
- **Feeling elicitation —** the high-leverage question: "what do you want someone seeing this for the first time to feel?" Adjectives drive palette and type recommendations.
- **Color recommendations —** trained on color theory + curated A-list brand references. Recommends per brand DNA.
- **Type pairings —** serif vs. sans vs. mixed; example logo treatment shown live.
- **Aesthetic taste discovery —** light vs. dark theme; rounded vs. sharp edges; monochrome vs. accented; art-style references.
- **Palette generation —** lightness/darkness axis + percentage-of-use logic (one dominant background color ~50%, accents balance). Each palette named and justified against brand DNA.
- **Font selection —** free-fonts library vs. paid-fonts library (~80 paid fonts scraped with descriptions). Header + body pairing.
- **Logo inspiration capture —** client uploads reference logos. Logo generation deferred — not live in-call. Image gen via ChatGPT image 2.0.
- **Symbols and visual metaphors —** AI pulls candidate symbols from origin story + archetype (e.g., the Raven + pillar concept that became Steve Taylor's mark).

2.7 Visual Brand Kit (Output)

The delivered artifact at the end of visual discovery. Locks all design preferences in one place.

- Final color palette.
- Logo (uploaded once produced).
- Type system.
- Imagery and photography direction — sample renders generated in-system to validate aesthetic alignment.
- Aesthetic preferences captured from discovery (e.g., outdoorsy, journaling motifs for Turner Hoff).

2.8 Visual Reference Library

Currently lives under Settings (placement is provisional). Manually uploaded references — Pinterest, Cosmos, Dribbble, Behance, ad screenshots.

LOGIC

- Every uploaded reference is auto-tagged with a use-case ("use this when…").

- Custom graphic generation pulls the three closest-matching references, then layers them against the client's brand guidelines (color, typography, mood).

PENDING INTEGRATION

- Meta Ads Library — public archive of top-performing ads. Plug in as a live reference feed so the generator learns from highest-performing creative.

2.9 Graphic Generation

Three-input compositing: reference graphics + brand guidelines + post copy → finished graphic.

- Used for Instagram audits, grid previews, newsletter design, YouTube/podcast covers.
- Legacy workflow (Gemini for figure render → ChatGPT for compositing) largely retired; ChatGPT now produces realistic human mockups end-to-end.

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3. Client-Facing OS ("ArcBase")

This is what the paying client sees. Designed around one rule: one CTA on screen at any time. Linear, gamified, save-and-resume.

3.1 Landing + Kickoff (Nova)

Client lands on a personalized intro from "Nova" — the ArcBase discovery agent. Voice/text intro frames the engagement.

NOVA'S OPENING COVERS

- Three discoveries ahead: brand foundations, content foundations, story deep-dive.
- What to bring: LinkedIn, website, writing samples, intro-style language.
- Hands off to a short intake panel for source connection.

3.2 Connector + Source Ingestion

The client wires up their accounts. The system scans and pulls. Some connectors are direct OAuth (Gmail); some are link-drop (LinkedIn URL is enough — no auth required at this stage).

CONNECTOR SET (CURRENT)

- Gmail (OAuth — scans up to ~40k emails at full plan).
- Google Drive (file scan).
- Fathom (API key today, OAuth target).
- Slack, Granola, Klaviyo, Notion, HubSpot, Substack, YouTube.
- Instagram, LinkedIn, newsletter feeds.

- Direct file uploads (PDF, transcripts, decks).

In the demo, Nova read across 47,000 sources — emails, inbox conversations, web pages, Instagram posts, 476 documents — within ~10 minutes.

3.3 Kickoff Intake → Timeline

After connector setup, the client completes a kickoff intake. They are then dropped onto the ArcLaunch timeline view — their progress tracker for the full engagement.

3.4 DNA Visibility Layer

As ingestion completes, the client sees a high-level summary of what Nova learned (built by Rafael). Surfaces:

- How you sound.
- Who you talk about.
- Who you talk to.
- How you think.
- Synthesized brand essence — mission, vision (a lighter-weight version of the admin Brand DNA view).

3.5 Discovery Flow

Stepped questions, each pre-filled by the agent based on ingested data. Client edits or confirms; never starts from blank.

PATTERN

- Question appears ("How do you normally introduce yourself?").
- Agent generates a draft answer, citing the source it pulled from.
- Client edits, accepts, or talks-to-refine.
- Optional voice-talk mode for clients who prefer to speak responses.

Discovery delivers the client to roughly 80% complete before any human intervention — the "to-80" principle Tim and Eli have been organizing around.

3.6 Visual Discovery (Client-facing version)

The same admin walkthrough from §2.6, repackaged as a self-paced flow. AI replaces Eli's live narration over time. Currently the AI handles the explanatory layer; logo generation and final palette curation remain partially human-driven.

3.7 Brand Strategy Delivery

Synthesized output of all discoveries. The OS currently stops short of auto-sending this — the Arcbound team reviews before release. Two-week target to remove that gate for managed-service clients.

3.8 Website Delivery

Final deliverable. Anton is documenting the website-build workflow so the system can produce truly custom sites against the brand kit and strategy.

3.9 ArcBase Recurring Content Surface

Post-launch home base. This is the recurring-revenue surface target).

CAPABILITIES (EXISTING + ROADMAP)

- Core messages — locked from brand strategy.
- Content topics — auto-loaded from agent.
- Custom chat per client (Pierce currently uses this for posts and newsletters).
- Review-and-edit for generated posts.
- Hotkeys: add a tension, callback a previous post, etc.
- Video scripts — generated, then recorded floating-head style in a built-in recorder. HeyGen integration in plan for AI-clone delivery.
- Trends feed — top Google trends tagged for relevance per client.
- Visual references library (shared from admin).
- Intel view — call transcripts, brand DNA snapshot, copy-to-clipboard for use in Claude/GPT.
- Goals — auto-derived from transcripts (e.g., "hit 1,000 podcast downloads on YouTube"). Auto-marked complete with milestone notifications.
- Post analytics.
- Light/dark mode toggle.

North-star: the "Jarvis" state

Six-month target articulated in the meeting: client logs in and the OS delivers a daily briefing — "Here's what we did while you were offline. We posted three approved posts. We found 30 people you should follow up with. Here are drafted messages. Send all, or review individually?" Calendar-aware, email-aware, fully integrated.

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4. Build Timeline

Pulled from explicit and implicit milestones discussed.

Now → 2 weeks out

Admin OS	Live and in active use by Arcbound team. First client [redacted] running through discovery on this surface. Brand DNA + per-client agents operational with source-grounded outputs.
Client OS	Self-serve dashboard live for kickoff + connector ingestion + DNA visibility. Discovery flow operational with agent-prefilled answers. Stops at brand-strategy delivery — Arcbound team reviews before client sees output.
Gap	Auto-delivery of brand strategy to client (currently human-gated). Two-week target to close.

Early June

Eli + Tim	Onsite at Tim's house — map Eli's transition to running ArcBase product + growth full-time. Define handoff between ArcBound services and ArcBase product.
Org structure	Bryan: drives Graviton. Eli: ArcBase product + growth. ArcBound: service layer bridging Graviton and ArcBase. 1 To 100: product/tech team for both.

Next ~6 months

ArcBase	Becomes self-serve. Until then, runs growth/product for ArcBound and feeds clients into managed service. Adds Meta Ads Library integration to Visual Reference Library. Adds Anton's website-build workflow so site delivery is fully automated. Adds Pierce's writing workflow for content generation at scale.
Sales / data	Sales system Rafael is building gets wired into client creation — applicants land pre-populated. HubSpot integration (flagged as top priority before Tim's team handoff per ArcOS pilot notes).
Long-horizon	Speaker marketplace connecting individuals to enterprise budgets / sales kickoffs. Brand-deal + activation marketplace inside the platform.

	HeyGen-powered AI clones for video content. "Jarvis" state — daily briefing, autonomous task execution with human approval gate.

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5. Productization Tiers

Vaibhav's framing from the call: the system shown is the superset. Three packaging tiers should be derived from it.

Tier 1 — Premium managed	Full Arcbound team, full admin OS, full visual-discovery walkthrough. Same depth as today, smaller team (2 people can do what 5 used to). Current pricing reference: engagements (historical).
Tier 2 — Mixed	Trimmed discovery — surface fewer decisions, more agent autonomy. Admin back-end still available for human override. Bridge tier between managed and self-serve.
Tier 3 — Self-serve (Graviton path)	System makes decisions on the client's behalf and presents results. Improvement loop available but minimal upfront input. One CTA at a time, linear flow. Get-to-value-fast is the constraint — large client pools (e.g. First Heritage Mortgage scale) won't get hand-holding.

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6. Operating Principles for the Rebuild

- **Ground every output in cited sources.** Brand DNA, agent responses, palette justifications — all reference the transcript line, document, or input they came from. No hallucinated outputs.
- **Expand, then condense.** Build the full superset first (admin OS). Distill down for client surfaces. Don't ship the admin density to consumers.
- **One CTA at a time.** Client-facing flow is linear, gamified, saves progress on exit, resumes on return.
- **To-80, then human polish.** Agent gets the client to roughly 80% complete on any input. Human (or AI-as-human) closes the last 20%.
- **Tier the same engine.** Premium / mixed / self-serve all run on the same back end. Surface complexity is the variable.

- **Connector-first ingestion.** Pulling 40k+ emails + Drive + Fathom + Instagram + LinkedIn beats asking the client to fill a form.
- **Avoid one-off MarTech traps.** The reason single-purpose tools (Social Coach, etc.) fail is friction-per-tool. The OS wins because it's the home base — every adjacent function lives inside it.
- **Decisions over options.** Surface a clear recommendation alongside the options. Don't dump choices on the client.

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7. Open Items + Decisions Pending

- Move Visual Reference Library out from under Settings — placement TBD.
- Meta Ads Library URL — find and integrate as a live reference feed.
- Auto-delivery of brand strategy to clients (currently human-reviewed) — two-week target.
- Logo generation — live in-call vs. async. Currently deferred from the live call.
- Fathom — move from API key to OAuth.
- HubSpot integration sequencing — flagged top priority before Tim's team takes over codebase.
- Srijata's expanded design role + the team-side communication around it (handle carefully per Bryan).
- Sujata onboarding to Graviton for demo-prep design work — 1hr session with Vaibhav, Slack + email access in motion.

End of outline.

OS - SiteMap

Arcbound OS — Complete Sitemap & Wireframe

ASCII wireframe of every routable surface in the app, grouped by audience.

A. Public Marketing (anonymous visitor)

arcbound.com / arcbase.ai

```
├── /                       Homepage
│   ├── HeroSection
│   ├── StickyTestimonialsSection
│   ├── BodySections
│   │   ├── OperatingModelDiagram
│   │   ├── OutcomesOrbitalDiagram
│   │   ├── ProductDashboardMockups
│   │   ├── InlinePullQuote × n
│   │   ├── NumberTicker stats
│   │   ├── NewsletterSliderLazy
│   │   └── TestimonialsWall
│   ├── CompaniesWall
│   ├── SiteFooter
│   └── WebSummitPopup
├── /process                ProcessTimeline (iframe → /arclaunch-timeline.html)
├── /faq                    FAQ
```

├── /team Team

├── /apply ApplyForArcbase → arcbase_applications

├── /brand-audit BrandAudit → brand_audit_submissions

├── /terms?key=… Terms (gated by terms-gate.txt match)

└── /unsubscribe?token=… Unsubscribe → suppressed_emails

B. Auth

├── /login AdminLogin (admin sign-in)

├── /client-login ClientLogin (client sign-in / sign-up)

├── /client-setup-password ClientSetupPassword (post-invite)

└── /reset-password ResetPassword (Supabase #type=recovery|invite|signup)

C. Admin Console (role=admin, behind AdminLayout)

/admin

├── /admin AdminDashboard

│ ├── Tab: Arc Launch (active clients pipeline)

│ ├── Tab: ArcBase (graduated clients)

│ └── Tab: Submissions (discovery_briefs inbox)

├── /admin/team AdminTeam (admins + admin_invites)

├── /admin/applications AdminApplications

├── /admin/visual-references AdminVisualReferences

├── /admin/analytics AdminAnalytics + GeoHeatmap + VisitorDrawer

├── /admin/nova-signal-review AdminNovaSignalReview

├── /admin/brief/:id AdminBriefView

```
├── /admin/client/:id                AdminClientView (the core admin cockpit)
│   ├── Client info card
│   ├── BrandOSSection (3 cards)
│   ├── ClientTimeline (5 phases × milestones)
│   ├── BrandDnaPanel
│   ├── KeywordResearchPanel
│   ├── NovaBriefingPanel
│   ├── ProhibitedVocabularyPanel
│   ├── WebsiteBuildPanel
│   ├── ScrapedMediaSection
│   ├── VisitHistoryPanel
│   ├── 30+ dialogs for milestones / emails / approvals
│   └── ShareLinkPopover (per artifact)
├── /admin/forge                     ForgeLanding (links to /forge)
└── Sales
    ├── /admin/sales/linkedin-audit      SalesLinkedinAudit
    ├── /admin/sales/brand-audit         SalesBrandAudit
    ├── /admin/sales/engine              SalesEngine
    │   └── /admin/sales/engine/:packageId SalesPackageDetail
    ├── /admin/sales/contracts           SalesContracts
    │   └── /admin/sales/contracts/:id   SalesContractBuilder
    └── /admin/applications              (also under Sales sub-nav)
```

D. Per-client Studios (admin-only)

```
├── /discovery?clientId=…                Discovery (Visual — 9 steps)
├── /brand-discovery?clientId=…          BrandDiscovery (5 steps)
├── /content-discovery?clientId=…        ContentDiscovery
├── /story-discovery?clientId=…          StoryDiscovery
├── /combined-discovery?clientId=…       CombinedDiscovery
├── /kickoff?clientId=…&launch=1         KickoffApp
├── /brand-strategy/:clientId            BrandStrategy (slide deck editor)
├── /sitemap-studio/:clientId            SitemapStudio (xyflow editor)
├── /vi-studio/:clientId                 VIStudio (VI slide deck)
├── /visual-brand-kit/:clientId          VisualBrandKit
├── /homepage-copy/:clientId             HomepageCopy
├── /website-brief/:clientId             WebsiteBrief (handoff doc)
├── /arcbase/:clientId                   ArcBaseDashboard (20-tab content engine)
│   ├── Plan: calendar / pipeline / approved / ideation / meeting-notes
│   ├── Create: chat / composer / carousel / newsletter / scripts
│   ├── Library: trends / visuals / inspiration
│   └── Brand: overview / intel / brand-dna / goals / assets / analytics
├── /teleprompter?title=…&hook=…&script=…&cta=…  TeleprompterRecorder
└── /pdf-viewer?bucket=…&path=…          PdfFullViewer
```

E. Per-client Portals (anonymous + share-token + PIN)

```
├── /client-dashboard/:shareToken                ClientDashboard
```

```
│   ├── Phase cards × 5
│   ├── DeliverablesGrid (link cards to each viewer)
│   ├── BrandDnaSnapshot
│   ├── ResyncBanner
│   ├── ClientPortalChat (drawer)
│   ├── /brand-intelligence                    ClientBrandIntelligence
│   │   ├── NovaReadSection
│   │   └── BrandDnaSnapshot (full)
│   ├── /discovery-answers                     ClientDiscoveryAnswers
│   └── /connections                           ClientConnections (ConnectorOrbit)
├── /strategy-view/:shareToken                 BrandStrategyView (PIN-gated)
│   ├── Slide nav + active slide + SlideFeedbackPanel
│   └── On uploaded-PDF deck → ExternalPdfViewer
├── /sitemap-view/:shareToken                  SitemapView (read-only xyflow + comment
pins)
├── /design-brief-view/:shareToken             DesignBriefView (PIN-gated)
├── /homepage-copy-view/:shareToken            HomepageCopyView
├── /media-upload/:shareToken                  MediaUploadPortal (HEIC + 50MB)
├── /client-content-review/:shareToken         ClientContentReview
│   ├── Tab: Content (ClientPortalContent)
│   ├── Tab: Calendar (ClientPortalCalendar)
│   └── Tab: Media (ClientPortalMedia)
├── /channel-share/:token                      ChannelSharePortal
```

├── /sales-preview/:shareToken SalesProspectPortal

└── /contract-sign/:token (ContractSignPortal, PIN) ContractSignPortal

F. Forge (naming tool)

├── /forge ForgePublicLanding (intake)

├── /forge/:projectId ForgePublicApp (ingest → review → generate → shortlist)

├── /forge/public ForgePublicLanding (alias)

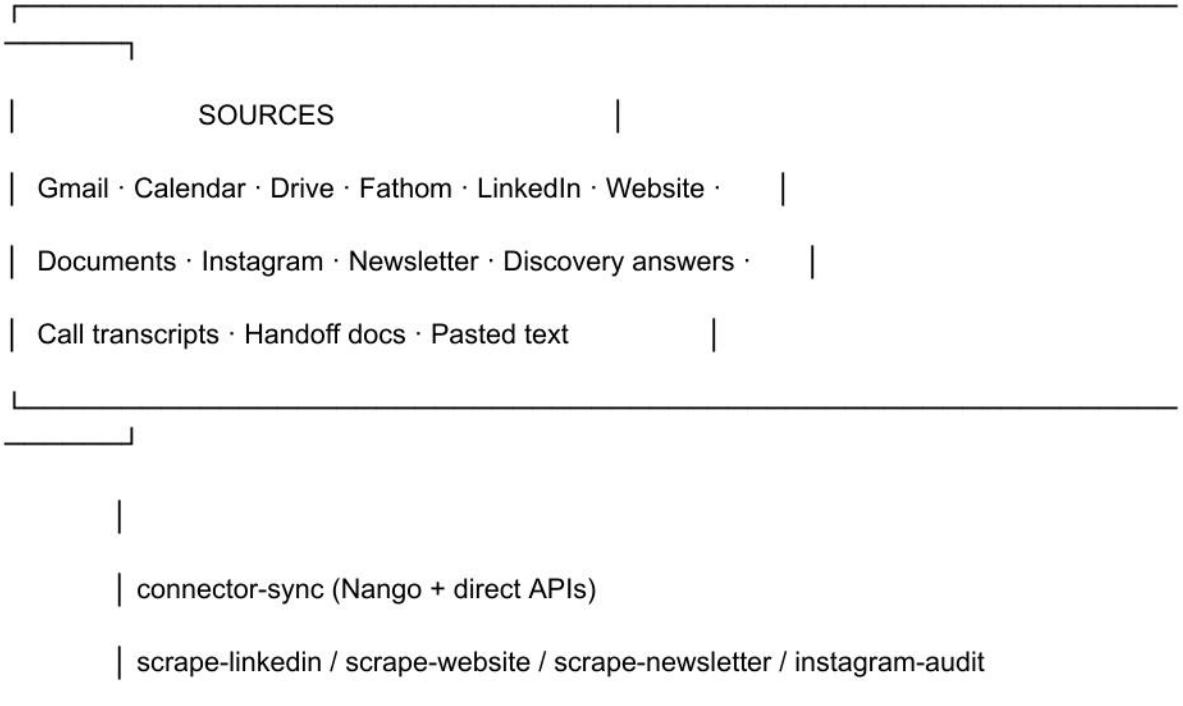
├── /forge/public/:projectId ForgePublicApp (alias)

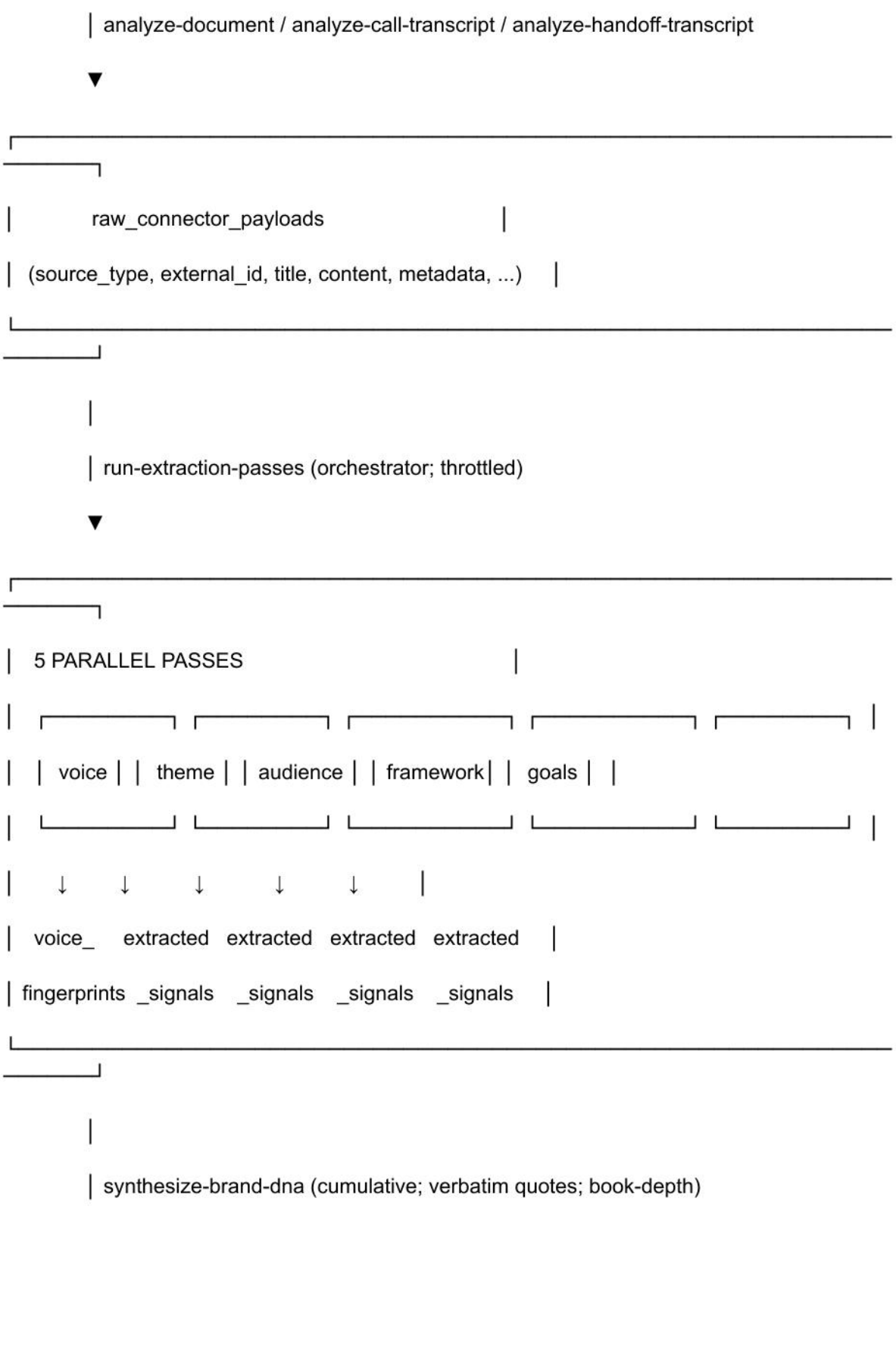
└── /forge/p/:projectId ForgeApp (admin/managed; 5 stages + personal-name branch)

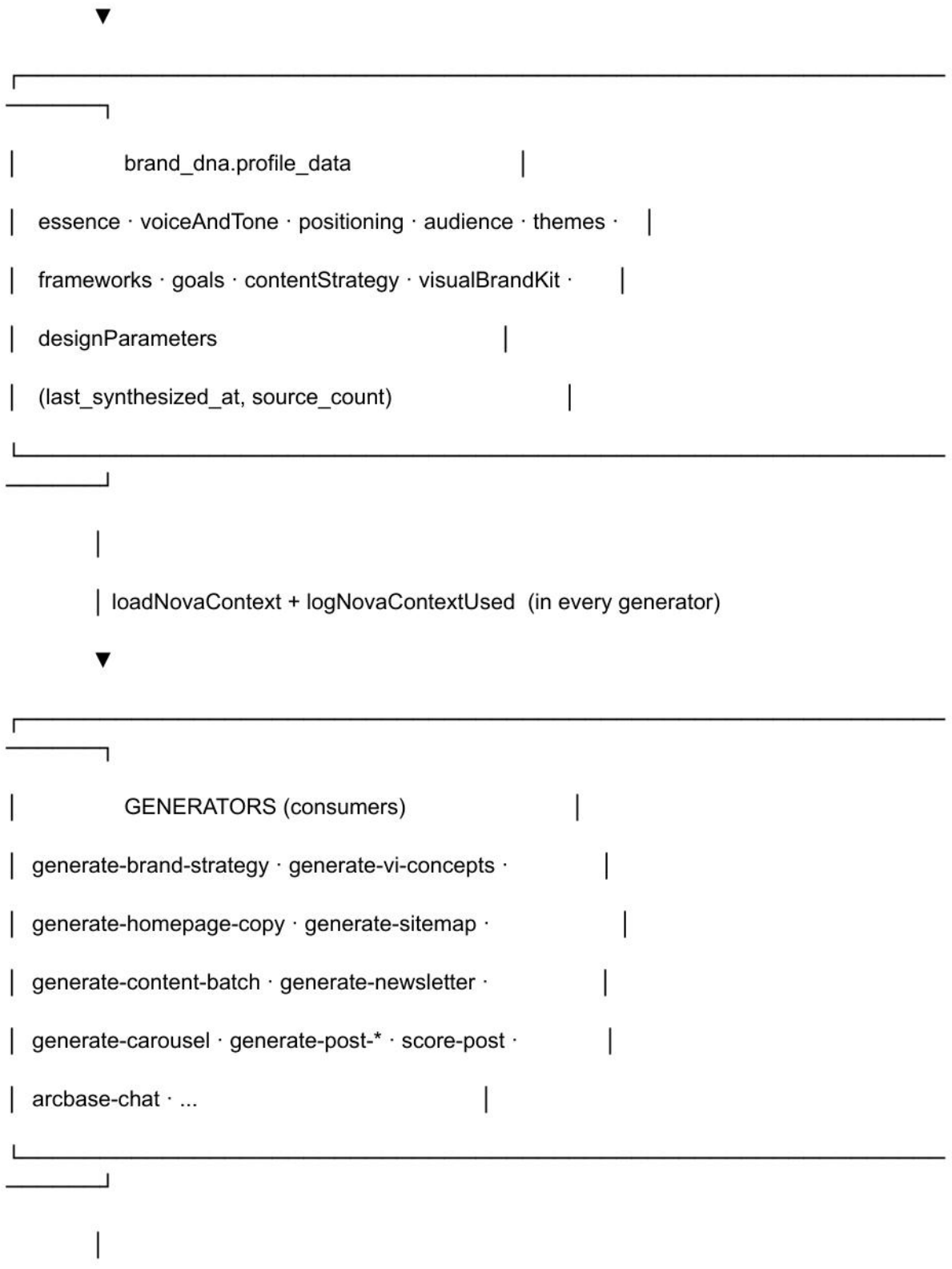
G. 404

`*` → `NotFound`

Data Flow Diagram (Nova pipeline)



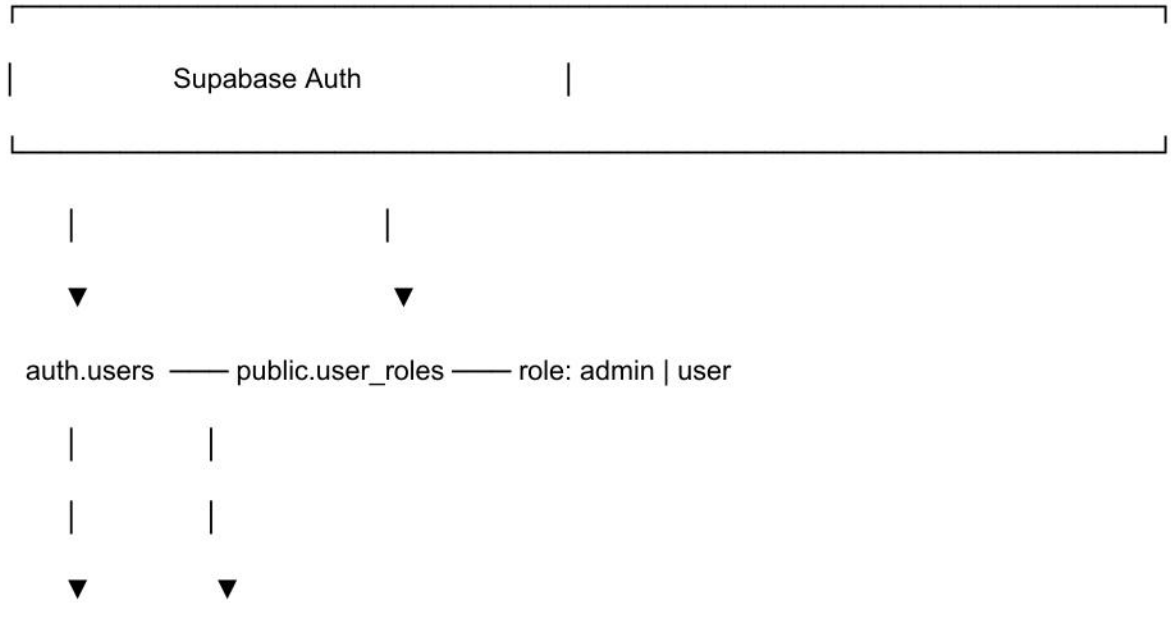

analyze-document / analyze-call-transcript / analyze-handoff-transcript
raw_connector_payloads
(source_type, external_id, title, content, metadata, ...)
run-extraction-passes (orchestrator; throttled)
5 PARALLEL PASSES
voice
theme
audience
framework
goals
voice_ fingerprints
extracted _signals
extracted _signals
extracted _signals
extracted _signals
synthesize-brand-dna (cumulative; verbatim quotes; book-depth)


brand_dna.profile_data
essence · voiceAndTone · positioning · audience · themes ·
frameworks · goals · contentStrategy · visualBrandKit ·
designParameters
(last_synthesized_at, source_count)
loadNovaContext + logNovaContextUsed (in every generator)
GENERATORS (consumers)
generate-brand-strategy · generate-vi-concepts ·
generate-homepage-copy · generate-sitemap ·
generate-content-batch · generate-newsletter ·
generate-carousel · generate-post-* · score-post ·
arcbase-chat · ...

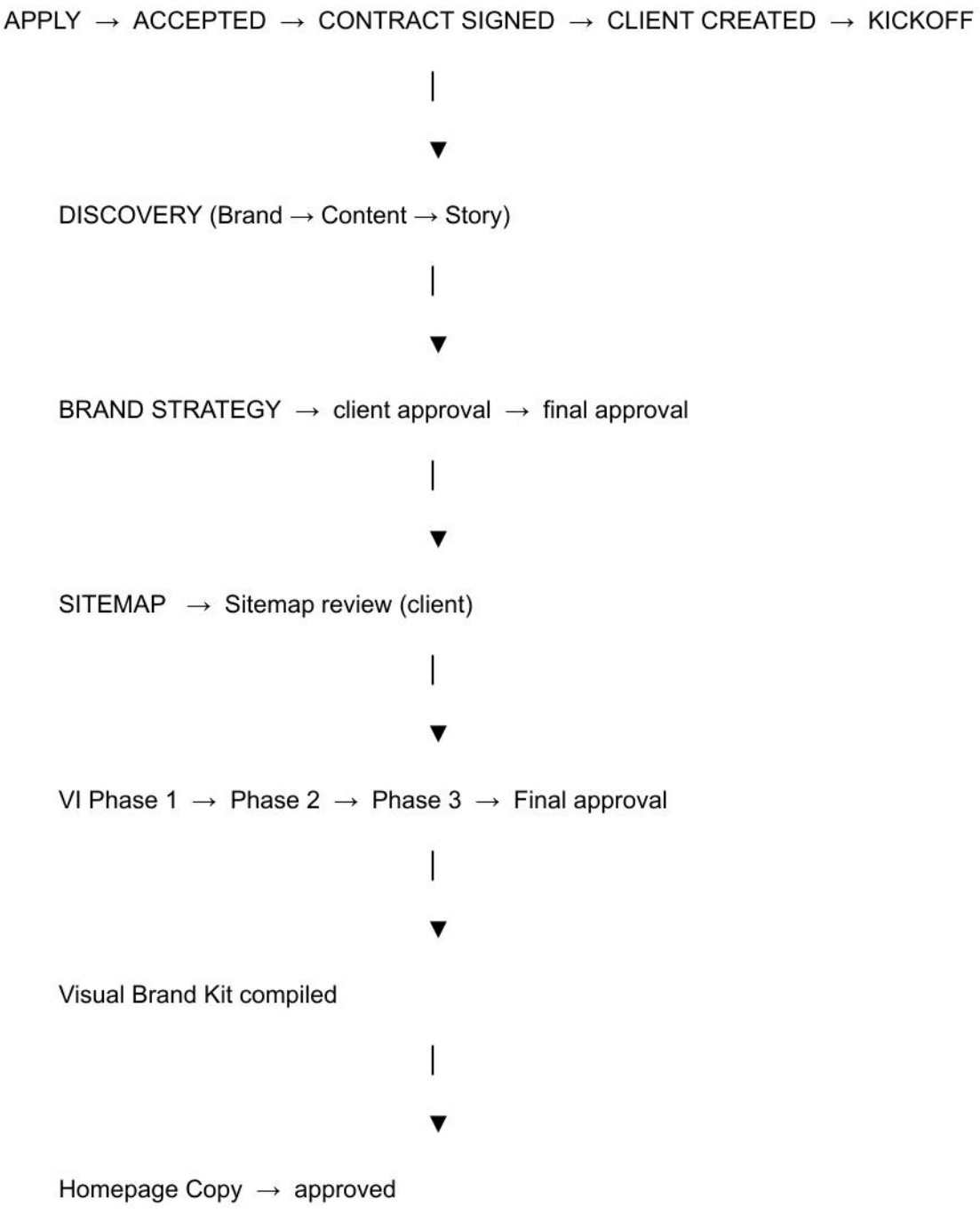
▼

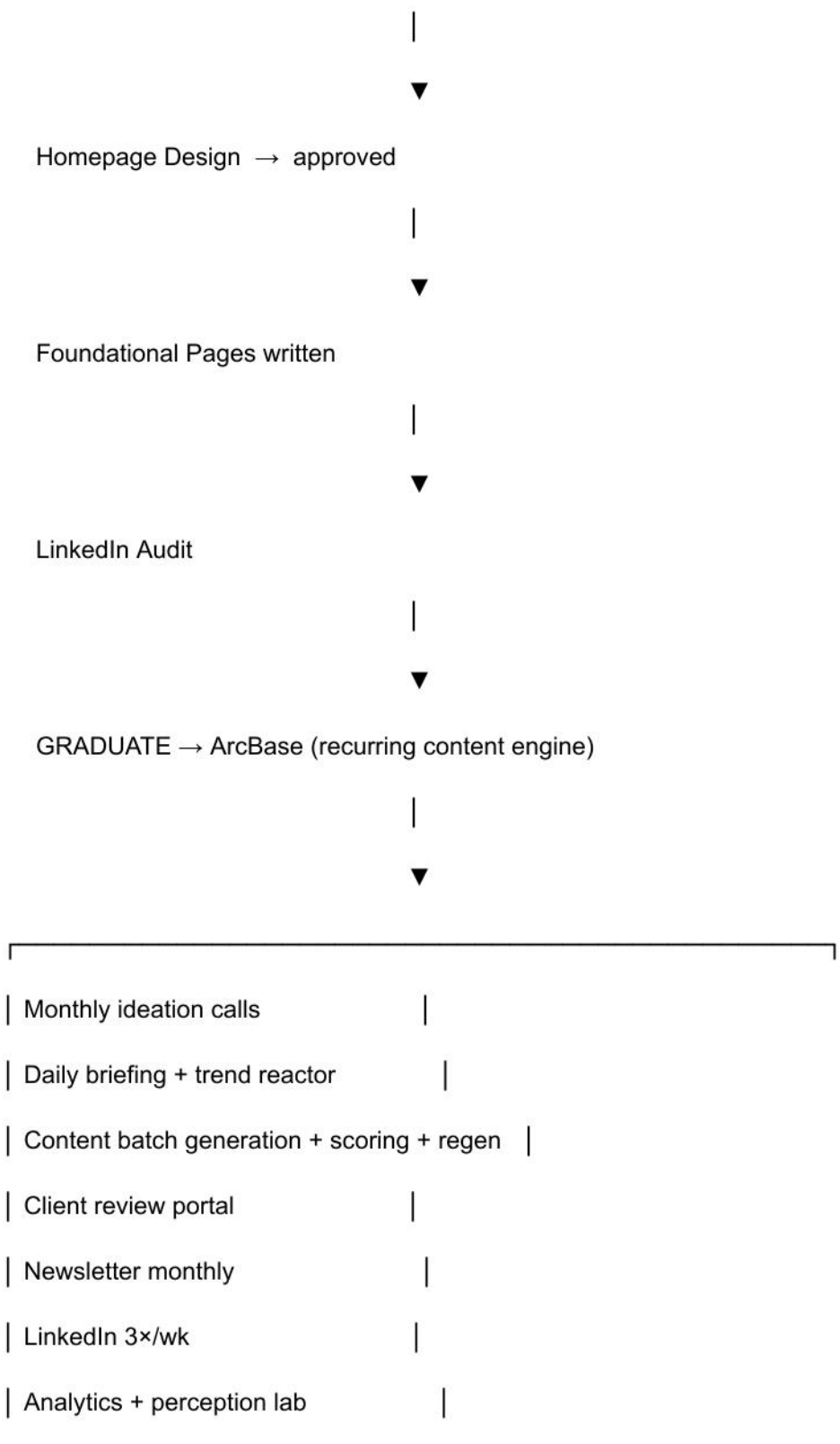
(deliverables surfaced in client portals)

Auth & Roles Diagram



Client Lifecycle Diagram (Managed-service "Arc Launch" → "ArcBase")




Homepage Design → approved
Foundational Pages written
LinkedIn Audit
GRADUATE → ArcBase (recurring content engine)
Monthly ideation calls
Daily briefing + trend reactor
Content batch generation + scoring + regen
Client review portal
Newsletter monthly
LinkedIn 3×/wk
Analytics + perception lab

└──┘

See `Arcbound_OS_Overview.md` for the deeper architecture and `Arcbound_OS_Components.md` for per-file details.