

OPERATOR'S FIELD INSTRUCTIONS

Voice-First Client Onboarding Workflow System (V2.0)

The **Voice-First Onboarding System** is a client-side web workspace designed to eliminate onboarding friction and capture authentic client tone on day one. By hosting the interactive dashboard at <https://expertaiprompts.info/voiceonboardingtool/> and maintaining a continuous, external voice call with Google Gemini (Smartphone or Desktop), operators can guide clients through structural business discovery without any manual typing barriers. This manual defines the exact interface controls, dual-app workspace protocol, and progressive chaining rules.

OPERATOR INSIGHT: When clients speak naturally in B2B interviews, they use plain trade language and organic examples. Traditional written questionnaires encourage brief, sterilized corporate answers. Capturing raw voice transcriptions provides high-fidelity, organic text that allows AI downstream to perfectly craft the client's tone of voice, USP, and Brand Identity.

1. GOOGLE GEMINI VOICE APP INTERFACE GUIDE

To conduct the interview seamlessly, operators must understand the exact physical and interactive controls of the Google Gemini App (mobile and desktop) voice interface. Follow these steps during a live interview session:

Gemini UI Action	Icon/Button Visual Description	Operator Protocol & Action
1. Start Voice Input	Microphone Icon Located inside the bottom right of the main prompt chat input field.	Tap the microphone once. A glowing soundwave animation will appear, signaling that Gemini is actively listening and transcribing your voice.
2. Stop / Pause	Red Stop / Pause Button A square or double-bar icon that replaces the microphone button when voice is active.	Tap this to stop transcribing or pause the recording temporarily. Use this to let the client think, review notes, or address on-site interruptions.
3. Submit Transcript	Blue Circular Up Arrow The submit/paper plane icon located to the right of the input text block.	Tap this icon to officially submit the transcribed voice answers. Gemini will process the context and immediately ask the next question.
4. Copy Full Results	Double-Document Copy Icon Located directly beneath Gemini's final synthesized response text block.	Tap the Copy icon to copy the entire response, including the markdown sections, the structural JSON, and the Tri-Backlogs to your clipboard.

2. THE DUAL-APP WORKSPACE PROTOCOL

To maintain frictionless momentum, operate on a dual-screen or dual-window workspace. Position your web companion app (<https://expertaiprompts.info/voiceonboardingtool/>) on one side and Gemini on the other. This ensures seamless prompt copying and transcript pasting.

- **Step A: Set Client Details.** Enter **Your Name** and **Company / Brand Name** — two separate fields — plus **Date Run**, at the top of the webpage. All three together dynamically drive the naming scheme for every generated file (Section 5).
- **Step B: Copy the Target Stage Prompt.** Tap the 'Copy Prompt' button on the current active accordion stage. A green ✓ Copied Prompt! text confirmation will fade in.
- **Step C: Launch Voice Session.** Paste the copied prompt into Gemini, turn on Voice Mode using the Microphone icon, and speak naturally. Answer each question one at a time.
- **Step D: Capture Gemini's Output.** When Gemini indicates it is finished and outputs the full synthesis, tap the Copy Icon at the bottom of the response block in Gemini.
- **Step E: Paste and Watch the Depth Guide.** Paste the clipboard contents back into the webpage's stage textarea. A live character count appears beneath the textarea once text is present, with a plain-language nudge (teal ✓ / amber △) if the transcript looks shorter than the suggested minimum depth — this is a guideline only and never blocks saving.
- **Step F: Save.** Click 'Save as Text File'. This triggers a browser download and automatically expands the next stage!

3. THE 4-STAGE CONTEXT CHAINING PIPELINE

The onboarding process must be run in exact chronological order. Each stage compiles a specific business vector and acts as the structural 'fuel' for downstream AI tools:

Stage	Primary Focus	Downstream Chaining & Tooling Impact
Stage 1: Who Am I	Richard Nelson Bolles 7-way Parachute framework (Skills, People, Conditions, Subjects, Geography, Financials, Purpose).	Generates the owner's personal context layer. Powers LinkedIn profile builders, bio sheets, and professional growth roadmaps.
Stage 2: Customer	Detailed buyer persona. Daily site frustrations, buying criteria, procurement responsibilities, and deal-breakers.	Drives customer-centric copywriting, target client lists, procurement outreach letters, and commercial pitches.
Stage 3: Value Prop	The 5 Core Proof Questions: Measurable Results, Objections, Referral Vocabulary, Time-to-Value, and Unreplicable Moat.	Generates high-converting StoryBrand hooks, landing page CTAs, capability statements, and tender-ready value sheets.
Stage 4: Brand Identity	Verbal and visual guardrails: Industry negatives to avoid, 3-word personality, homepage emotional hook, and visual styling.	Provides guidelines for designers and copywriters. Establishes visual briefs (Navy/Steel/Orange) and verbal rules.

4. OPERATIONAL DATA MANAGEMENT

To protect client information and ensure high speed, the system is designed to run entirely client-side with zero remote database connections. Use these guidelines to manage onboarding sessions:

HTML5 LOCAL STORAGE COMPLIANCE: The web app automatically saves all text input and client identity fields locally in the user's browser. If the page is accidentally closed, refreshed, or your battery dies during a call, **no progress is lost**. Simply reopen the page on the same browser to resume.

IMPORTANT: Because data is stored in the browser, always click the red 'Clear All Data' button at the top before starting a session for a NEW client. This wipes local storage — including Name, Company, and all four transcripts — protecting client confidentiality and preparing the inputs for a fresh run.

5. INTEGRATING WITH DOWNSTREAM PROMPT ASSEMBLERS

Once the four files are saved to your local drive (formatted as

`[Company]_[Person]_[DocumentType]_[DateRun].txt` — e.g.

`Expert_AI_Prompts_Matthew_Bulat_CustomerPersona_17Aug2026.txt`), you are ready to parse the structured data. Each file carries the interview in two forms: a human-readable transcript for editing, and a machine-readable data block for downstream tools.

1. **Locate the Machine Data Block:** Open the downloaded text file and find the section fenced between two rows of `#` characters, headed `# MACHINE DATA BLOCK`. Copy the JSON object between the fences — this is the parsed, structured version of the interview, ready to use as-is.
2. **Expert AI Prompt Assembler:** Paste the JSON block into your master prompt template context fields. This instantly customizes marketing campaigns, sales emails, and blog strategies with zero generic AI fluff.
3. **CDD Blueprint Builder:** Paste the Customer Persona and Value Proposition JSON blocks directly into the CDD Blueprint Builder to auto-compile tender-ready Capability Statements and CBA compliance reports.
4. **Agency Hand-off:** Share the structured txt files directly with creative agencies. The JSON gives developers immediate data parameters, while the raw voice transcript provides copywriters with authentic verbal styles, saving up to 80% of brand scoping time.

DEVELOPMENT ROADMAP: This V2.0 single-file HTML/JS tool is hosted on expertaiprompts.info/voiceonboardingtool/. A future roadmap stage involves migrating the interface to Google AI Studio, enabling direct API integration that will automatically parse the raw transcript into JSON without requiring the operator to copy/paste results manually. For development inquiries, contact Matthew Bulat.