

# Discovery call converted into a delivery-ready project report.

This PDF shows how Meet-to-Spec turns a discovery call, brief, and supporting documents into requirements, PRD sections, a delivery task plan, proposal economics, and a human approval queue. It is formatted as a client-ready sample report, not a raw transcript export.

## SOURCE PACKAGE

**47-minute discovery call + client brief + migration notes**

## CONTROL MODEL

**Human approval required before client export**

## GENERATED ARTIFACTS

**Requirements, PRD, Jira-ready tasks, proposal summary, review queue**

## REPORT STATUS

**Sample output for evaluation**

# Modern billing platform migration

The client wants to migrate a legacy billing system into a modern multi-tenant platform. The new system must support real-time billing visibility, self-service invoice history, and an API-first architecture that can scale to 50,000 concurrent users by Q3.

14 wks

Suggested delivery timeline

\$168k

Estimated implementation investment

50k

Concurrent user target

5

Artifacts routed for approval

WORKFLOW TRACE

## How the input became delivery artifacts

01

Ingest

Transcript, brief, budget notes, and constraints.

02

Extract

Requirements, priorities, risks, and assumptions.

03

Draft

PRD sections, task plan, and proposal package.

04

Review

Human reviewers approve, edit, or block outputs.

05

Export

Approved artifacts move to client workspace and PM tools.

REQUIREMENTS MATRIX

## Confirmed and inferred requirements

| ID      | REQUIREMENT                                                      | PRIORITY | STATUS    | REVIEWER ACTION                                     |
|---------|------------------------------------------------------------------|----------|-----------|-----------------------------------------------------|
| REQ-001 | Multi-tenant billing architecture with tenant-level isolation.   | Critical | Confirmed | Use as core architecture constraint.                |
| REQ-002 | Real-time invoice status dashboard for operations and customers. | High     | Confirmed | Convert to product and analytics requirements.      |
| REQ-003 | Self-service invoice history, including prior billing periods.   | High     | Inferred  | Ask whether downloadable PDFs are required.         |
| REQ-004 | End-of-month processing must complete in under 4 hours.          | Critical | Confirmed | Convert to load test acceptance criteria.           |
| REQ-005 | System must support 50,000 concurrent users by Q3.               | Critical | Confirmed | Validate concurrency assumptions and usage model.   |
| REQ-006 | API-first architecture for integrations and downstream systems.  | High     | Inferred  | Confirm API consumers, auth model, and rate limits. |

PRD PACKAGE

Sections generated

- Executive summary and problem statement
- Target user personas and usage scenarios
- Functional requirements grouped by capability
- Non-functional requirements for performance, security, and availability
- Technical architecture assumptions and integration points
- Risk assessment, dependencies, and open questions

HUMAN GATE

Approval rule

Meet-to-Spec does not blindly push requirements, tasks, or proposal language into a client workspace. Inferred requirements, pricing assumptions, and milestone language remain blocked until the assigned reviewer approves them.

NON-FUNCTIONAL REQUIREMENTS

Performance, security, and operational constraints

| AREA             | REQUIREMENT                                                        | ACCEPTANCE SIGNAL                                  | RISK LEVEL |
|------------------|--------------------------------------------------------------------|----------------------------------------------------|------------|
| Performance      | Support 50,000 concurrent users during peak billing windows.       | Load test profile approved before build phase.     | High       |
| Batch processing | End-of-month processing completes in under 4 hours.                | Benchmark run with representative billing dataset. | Critical   |
| Security         | Tenant isolation, role-based access, and audit history.            | Architecture review plus security test plan.       | High       |
| Reliability      | Billing visibility must remain available during migration windows. | Rollback plan and monitoring dashboards approved.  | Medium     |
| Integration      | API-first model for finance, CRM, and customer-facing systems.     | OpenAPI draft and integration acceptance suite.    | Medium     |

DELIVERY PLAN

Suggested task structure

| EPIC                       | TASKS | POINTS | PRIMARY OUTPUT                                                       |
|----------------------------|-------|--------|----------------------------------------------------------------------|
| Billing Engine Migration   | 12    | 34     | Migration plan, service boundaries, data migration checklist.        |
| Multi-tenant Architecture  | 8     | 21     | Tenant model, isolation rules, permissions, and data model.          |
| Dashboard and Self-Service | 10    | 18     | Invoice status dashboard and customer invoice history UX.            |
| API Layer and Integration  | 7     | 15     | API contract, auth model, integration tests, and rate limit plan.    |
| Testing and QA             | 6     | 13     | Load testing, regression coverage, UAT script, and launch checklist. |

PROPOSAL DRAFT

Commercial summary

|                                   |                                          |
|-----------------------------------|------------------------------------------|
| Estimated investment              | \$168,000                                |
| Approved budget mentioned in call | \$180,000                                |
| Suggested timeline                | 14 weeks                                 |
| Payment structure                 | 30% upfront, 40% milestone, 30% delivery |

DRAFT POSITIONING

Client-facing proposal angle

The recommended proposal frames the work as a phased modernization of a revenue-critical billing platform, with early focus on migration safety, tenant isolation, real-time visibility, and measurable processing performance.

APPROVAL QUEUE

Human review status before export

| ARTIFACT                | REVIEWER | STATUS   | EXPORT BEHAVIOR                                        |
|-------------------------|----------|----------|--------------------------------------------------------|
| PRD Document            | CTO      | Approved | Ready for client workspace export.                     |
| Requirements List       | PM       | Approved | Ready for project management import.                   |
| Task Structure          | PM       | Pending  | Blocked until story sizing and ownership are reviewed. |
| Proposal Draft          | CEO      | Pending  | Blocked until commercial language is approved.         |
| Timeline and Milestones | CTO      | Approved | Ready for proposal package.                            |

REVIEWER CHECKLIST

Open questions before client delivery

|                                                                      |                                                                     |
|----------------------------------------------------------------------|---------------------------------------------------------------------|
| Confirm the exact concurrency pattern behind the 50,000 user target. | Confirm whether invoice history requires downloadable PDF invoices. |
| Validate milestone payment language before proposal delivery.        | Review inferred API-first requirement with the client stakeholder.  |
| Confirm data migration source systems and retention requirements.    | Approve final risk language before exporting the proposal package.  |

# What the team receives after approval

**Client delivery report**

Polished PDF summary for stakeholders, including scope, requirements, timeline, and risks.

**PRD workspace draft**

Structured PRD sections that can be copied into Notion, Confluence, Google Docs, or a client portal.

**PM import sheet**

Epic and task structure prepared for Jira, Linear, ClickUp, or another delivery system.

**Important quality control note**

This sample is intentionally formatted as a production-style report. In a live implementation, every inferred requirement, commercial assumption, and export destination remains reviewable before it is sent to a client or pushed into downstream tools.

RECOMMENDED NEXT ACTION

**Confirm assumptions, then export**

The current package is ready for internal review. Once the pending task structure and proposal language are approved, Meet-to-Spec can export the report, PRD, and task plan into the team's preferred delivery workflow.

IKHORA CONTROL PRINCIPLE

**AI drafts. Humans approve. Systems execute.**

The value is not just faster documentation. The value is a repeatable workflow that turns messy client context into reviewed, measurable, execution-ready artifacts.