

# UpShift Knowledge Bot

## PRD & Technical Spec

Owner: Scott Walker · Status: Live (production) · Last updated: May 14, 2026

Surface: upshiftcollective.com (homepage floating widget)

## 1. Purpose

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The UpShift Knowledge Bot is an on-site AI concierge that answers visitor questions about UpShift Collective — methodology, services, ROI, clients, pricing, partners, and how to engage Scott — without forcing the visitor to read the whole site or wait for a call.

It is a **top-of-funnel qualification and education tool**. It is not a chatbot for existing clients, a support tool, or a sales-automation system.

## 2. Audience

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- Prospective clients: executives, founders, and operating leaders evaluating an AI transformation partner
- YPO peers and event organizers evaluating Scott for keynotes, workshops, and the AI Forum
- Partners and journalists looking for a quick, accurate brief on UpShift

### 3. Goals & Success Criteria

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Goal	Measure
Answer the top 15–20 questions visitors actually ask	Coverage of the curated KB sections
Stay strictly on-message	Zero invented client names, metrics, or claims
Make it trivial to contact Scott	Email, Motion booking link, and phone surface in every off-topic answer
Stay available even if the AI gateway fails	Local keyword-matched fallback always responds
Protect partner positioning	Partners referenced only as “The Collective” — no individual partner staff named

### 4. What's Driving It

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UpShift's website is intentionally narrative and editorial. Visitors who want a fast, specific answer (“what's your pricing model?”, “who do you work with?”, “how do you measure ROI?”) need a way to get one without reading every section. The bot exists to **shorten the path from curiosity to a booked call.**

## 5. Where the Data Comes From

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The bot is **fully static knowledge** — no live CRM, calendar, or runtime data fetching.

### Primary source (when AI gateway is reachable)

- **File:** `supabase/functions/knowledge-bot/index.ts`
- **Mechanism:** A single curated `KB_CONTEXT` string is sent as the system prompt to the Lovable AI Gateway alongside the user's message history.
- **Sections covered:** AI Readiness Assessment · Onboarding · 4-Phase Roadmap · Speaking & Keynotes · ROI / Results · Clients · AI Champions Committee · Workshops & CRAFT framework · YPO AI Forum · Philosophy · Pricing · Scott Walker bio · The Collective (partners) · Tool comparisons · Contact.

### Fallback source (when AI gateway is unreachable, rate-limited, or out of credits)

- **File:** `src/components/site/KnowledgeBot.tsx`
- **Mechanism:** A local `KB[]` array of `{ id, keywords, response }` entries scored against the user's query. The highest-scoring entry's pre-written HTML response is returned.
- **Mirror requirement:** The local KB and the edge-function `KB_CONTEXT` must be edited together — they are the same content in two formats.

### Out of scope for the data layer

- No live CRM lookups
- No calendar availability
- No conversation persistence
- No PII collection
- No authentication

## 6. Functional Spec

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- **Surface:** Floating bot widget on the homepage, mounted by `Index.tsx`.
- **Interaction model:** Single-turn-feel chat with rolling history sent on each request so the model has context.
- **Response format:** HTML only. Allowed tags: `<h4>`, `<p>`, `<ul>`, `<li>`, `<strong>`, `<em>`, `<mark>`. Key numbers and metrics are wrapped in `<mark>` for emphasis. No markdown, no code fences.
- **Tone:** Concise, executive, plain English. Two to five short paragraphs or a bullet list. No fluff.
- **Off-topic handling:** A 1–2 sentence honest answer plus the contact block (email, Motion link, phone).
- **Debug panel:** Internal-only toggle that shows keyword scores, the chosen KB entry, response source ( `ai` vs `local-fallback` ), and latency. For QA — not exposed to end users.

## 7. Technical Spec

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### Frontend

- **Component:** `src/components/site/KnowledgeBot.tsx`
- **Stack:** React 18, TypeScript, Tailwind, Lucide icons
- **Transport:** `supabase.functions.invoke('knowledge-bot', { messages })`
- **Local fallback:** Triggered on any non-2xx response or network error

### Backend

- **Runtime:** Deno edge function
- **File:** `supabase/functions/knowledge-bot/index.ts`
- **Provider:** Lovable AI Gateway ( <https://ai.gateway.lovable.dev/v1/chat/completions> )
- **Model:** `google/gemini-3-flash-preview` (fast, low-latency, sufficient for KB-grounded Q&A)
- **Auth:** `LOVABLE_API_KEY` server-side only — never exposed to the browser
- **CORS:** Open ( \* ) — public read-only endpoint

### Error handling

Status	UI behavior
200	Render the AI HTML answer
429	“Rate limit reached. Please try again in a moment.”
402	“AI credits exhausted. Please add credits in workspace settings.”
5xx / network	Fall back to the local KB entry with the highest keyword score

### Privacy & security

- No chat persistence
- No PII collected or stored
- No authentication required
- API key kept server-side only
- Input is treated as untrusted; output is HTML-restricted to a known tag set

## 8. Governance & Content Ownership

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- **Content owner:** Scott Walker
- **Edit path:** Update both `KB_CONTEXT` (edge function) and the local fallback `KB[]` in lockstep.
- **Review cadence:** Quarterly, plus any time pricing, methodology, partner positioning, or contact info changes.
- **Partner positioning rule:** Partners are referenced only as members of “The Collective.” Do not name individual partner-organization staff in public-facing bot copy.

## 9. Roadmap / Open Items

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- Optional: persist anonymized chat logs for analytics on what visitors ask
- Optional: streaming responses for lower perceived latency
- Optional: page-aware context (e.g., bot knows the visitor is currently on `/diagnostic` )
- Optional: A/B test the entry-point microcopy on the floating widget
- Optional: structured handoff (capture name + email if visitor asks to be contacted)

## 10. Out of Scope

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- Live data integrations (CRM, calendar, billing)
- Authenticated client-portal use cases
- Multi-language support
- Voice interface