

Sell-Side Analyst Reports Document Summarization - William Holbrook

This is a questionnaire to help me gather what the requirements of the tool/software I am developing would be

Please answer as may questions as you can but not all may be applicable so leave as many blank as you would like

General Topic

My project spans 3 main topics: Data Extraction, Natural Language Processing and Web Development. My project aims to develop and deploy a web app that allows users to upload sell-side analyst reports about companies and quickly provide high level insights into what the report is saying. The information provided should support the user manage the relationship with the company.

Currently there are products like Factiva and Bloomberg Terminal that provides users lots of frequent reports on different companies. Extracting and Analysing relevant information from these reports can take several hours. The aim of my solution is to be able to process reports quickly as soon as they are available to better manage client relationships with the company the report is written for, for more clients than would be possible if the reports are manually processed.

My full project proposal can be found

here: <https://1drv.ms/b/s!AmwKyWgDe8gag9UQ6UTBI0nYn7vzAQ?e=VI5QUf>

1. Currently how do you/would you **manually** use Sell-Side Analyst reports to gain insights on a specific company?

2. What tools do you currently use to gain insights on a specific company using Sell-Side Analyst reports?

3. Currently, on average, how much time does it take you to extract information from Sell-Side Analyst reports to gain insights on a specific company?

4. If you wanted a summary from a sell-side analyst report what information would you be interested in having?

5. Ideally how long should a summary from a sell-side analyst report be?

6. How do you use insights gained from Sell-Side Analyst reports in your work and what is the business value?

7. If it took less time to gain insights from Sell-Side Analyst reports what would this allow you to do? (e.g. provide insights on more companies; allow conversations to happen earlier etc.)

8. How long would you be willing to wait for a report to be processed before gaining automated insights?

9. How would you like to interface with a tool/program that allowed you to summarize analyst reports? e.g. would you like a website, a local app, a REST API to allow programmatic use of the tool (i.e. to be able to build it into another solution)?

10. What external data would be useful to be available alongside extracted insights from reports? (e.g stock prices over time)

11. What insights would you be interested in having from multiple reports on the same company or industry?

12. What would your user story for using my tool/program be? If you can give your problem how you would ideally use the software and how the tool would solve your problem that would be great

This content is neither created nor endorsed by Google.

Google Forms