| **Epic #** | **Epic Title** | **Model-heavy** | **Data-heavy** | **UX-heavy** | **Why** | **Core Features** | **Success Criteria** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **1** | Outlook-Embedded Client Meeting Prep Activation |  | ✅ | ✅ | Remove context switching; start prep instantly inside Outlook | • Calendar event parsing & meeting classification• CRM client match• Embedded panel load with tabs (Client Insights, Briefs, Script Assistant) | • ≥95% correct meeting classification• Context loads ≤2s• ≥75% of bankers use in-Calendar prep features |
| **2** | Meeting Context & Highlights | ✅ | ✅ | ✅ | Quick orientation with high-signal updates | • “Recent Updates” feed• Clickable insight chips• Linked research/news integration | • First useful insight in <30s• ≥80% sessions click an insight chip |
| **3** | Talking Points Generator | ✅ |  | ✅ | Provide role-specific conversation openers instantly | • Persona tailoring (CEO/CFO)• Section regeneration• Source-linked bullets | • ≤5s generation time• ≥60% briefs have tailored points• ≥90% facts sourced |
| **4** | Key Metrics & Market Snapshot |  | ✅ | ✅ | Provide quick, accurate client/market numbers without terminals | • Financial metric tiles• YoY/QoQ change calculations• Sparkline charts & metric explainer chips | • ≥95% data accuracy• Chart loads <1.5s• ≥80% banker satisfaction |
| **5** | Attendee Intelligence | ✅ | ✅ |  | Provide relationship context for meeting participants | • Attendee roles & contact info• LinkedIn links• Past meeting theme summaries | • ≥95% correct role match• Themes shown for ≥1 attendee in 70% of meetings |
| **6** | Deck-Aware Question Anticipation (Script Assistant) | ✅ |  | ✅ | Anticipate client questions from shared decks | • File upload & parsing• Slide/topic extraction• Role-specific Q&A generation• Share to team function | • ≥70% bankers rate Qs “useful”• ≥50% share rate• ≤5s generation time |
| **7** | Client Briefs Workspace |  | ✅ | ✅ | Centralize briefs & templates for easy reuse | • Brief list view• Template creation• Meeting linking• Export options | • Time to first brief <15s• ≥60% briefs from templates• Export success ≥99% |
| **8** | Client Brief Composer & Export | ✅ |  | ✅ | Produce the banker’s prep deliverable | • Section editing & regrading• Section reordering• Export to Word/email | • ≥80% briefs sent/exported• Edit+regrade ≤3s per section |
| **9** | Data Source Manager & Entitlements |  | ✅ |  | Ensure secure, entitled data access | • Source selection UI• Entitlement enforcement• Retrieval logging | • 0 entitlement violations• 100% facts have valid source IDs |
| **10** | Evidence, Citations & Confidence | ✅ | ✅ |  | Build banker trust in AI outputs | • Inline citations• “Show sources” toggle• Confidence scores• “I’m not sure” fallback | • ≥95% groundedness• 0 uncited factual claims• Confidence shown for all sections |
| **11** | Sharing & Distribution Controls |  | ✅ | ✅ | Securely share outputs with relevant stakeholders | • One-click send to attendees• Watermarking• Access control management | • ≥98% share success• 0 mis-share incidents |
| **12** | Compliance Checkpoints (Pre-Send) |  | ✅ |  | Prevent restricted content from leaving the system | • Pre-send scanning for restricted content• Flagging mechanism• Compliance routing & review | • 100% flagged items blocked/remediated• <5% false positive rate |
| **13** | Model Evals & Quality Gates | ✅ | ✅ |  | Maintain quality before releasing AI outputs | • Golden set evaluation• Groundedness & citation tests• Latency & cost benchmarks• Canary release framework | • ≥95% groundedness on eval set• P95 latency <5s• Pass all safety tests pre-release |
| **14** | Observability & Telemetry |  | ✅ |  | Gain visibility into performance and usage | • Prompt/version logging• Retrieval set IDs• Latency, token usage, and cost tracking | • 100% requests logged• Latency tracked for all sessions• Prompt versions traceable |
| **15** | Instrumentation for Continuous Improvement | ✅ | ✅ | ✅ | Continuously improve via banker feedback and usage data | • Inline thumbs up/down• Banker comment capture• Usage heatmaps• Model retraining signals | • ≥50% bankers give feedback• Model updates improve quality scores |

#### User Stories

1. **Calendar Event Parsing & Meeting Classification**
   * Parse event details (subject, attendees, metadata) when user opens a meeting and classify it as client or non-client.
2. **CRM Client Match Integration**
   * Match detected client names/domains to CRM records for confirmation and enrichment.
3. **Desktop Task Pane: Embedded Panel Load in Outlook (Windows)**
   * Load Aiden Banker task pane inside Outlook Desktop’s meeting view.
4. **Tab Navigation Setup (Client Insights, Briefs, Script Assistant)**
   * Implement tabbed navigation inside task pane to switch between core modules.
5. **Manual Override for Non-Matched Meetings**
   * Allow banker to manually mark a meeting as client-related if classification fails or no CRM match is found.
6. **Error Handling & Fallback States (incl. offline/weak network)**
   * Gracefully handle classification or CRM service failures with clear user messaging.
7. **Performance Optimization (≤2s panel load on desktop)**
   * Ensure parsing, classification, and task pane load happens within target latency.
8. **Telemetry & Logging for Usage**
   * Capture metrics on classification decisions, overrides, panel opens, and feature clicks.
9. **SSO/Auth for Desktop (Graph + CRM)**
   * Authenticate securely via SSO for both Outlook and CRM data access.
10. **Admin Consent & Centralized Deployment (Desktop)**
    * Enable deployment through centralized IT policies, ensuring required permissions are pre-approved.
11. **Office.js/Graph Compatibility & Policy Configuration (Desktop)**
    * Ensure add-in operates within Office.js constraints on Outlook Desktop and complies with org-level policy configurations.

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### User Story 1 – Calendar Event Parsing & Meeting Classification

**As a** coverage banker preparing for a client meeting in Outlook Desktop

**I want** the Aiden Banker add-in to automatically parse the details of my currently opened calendar event (title, attendees, organizer, body text, location) and classify it as a client meeting or not

**So that** I can instantly access relevant prep materials without manually entering the client name or meeting type.

#### Acceptance Criteria

1. **Trigger Behavior**
   * Classification runs automatically when the banker double-clicks and opens a meeting in Outlook Desktop.
   * Parsing must happen without requiring the banker to press any extra buttons.
2. **Parsing Rules**
   * Extract meeting subject, attendee list (names + email domains), organizer, and meeting body text.
   * Normalize extracted data (case, whitespace, special characters).
3. **Classification Logic**
   * Compare extracted attendee domains and meeting subject keywords against the approved CRM client list.
   * Apply rules:  
     + If ≥1 external client domain matches CRM → mark as *Client Meeting*.
     + If no match → mark as *Non-Client Meeting*.
   * If inconclusive, default to “Not Classified” and show option for manual override.
4. **Performance Requirements**
   * Classification decision displayed within **1.5 seconds** of opening the meeting.
   * Must function offline with cached CRM data (≤24h old).
5. **User Feedback**
   * Show visual indicator in meeting view header:  
     + ✅ "Client Meeting" in green if matched
     + ⚪ "Not a Client Meeting" in gray if no match
     + 🟡 "Needs Review" if uncertain
   * Provide manual override option in UI.
6. **Error Handling**
   * If parsing fails, show “Classification unavailable” message and allow retry.
   * Log all failures to telemetry with reason codes.
7. **Security & Privacy**
   * Parsing happens locally; external data calls only for CRM matching.
   * Must comply with org data policies and Outlook add-in permissions.

#### Dependencies

* Outlook Desktop API (Office.js) access for event metadata.
* Graph API for attendee list retrieval.
* CRM API for client domain lookup.
* Internal classification rules engine.

#### Non-Functional Requirements

* Works only in Outlook Desktop (Windows) in this phase.
* Must handle meetings up to **200 attendees** without degradation.
* Logging must include: meeting classification result, time taken, CRM lookup result.

#### Definition of Done

* Banker opens any meeting → classification runs automatically.
* UI indicator correctly reflects classification result.
* Decision and metadata logged for ≥95% of meeting opens without error.
* Meets latency, accuracy, and offline fallback requirements.

Hi [Recipient],

As requested, I’ve put together the initial framework for our first engineering conversation, including:

* Wireframes for key user flows.
* A complete list of epics tied to those wireframes.
* The user stories for **Epic 1**.
* A fully fleshed-out example story to show the detail level engineering will receive.

This gives us a strong foundation to begin, but if we proceed, we’ll need to address a few **key gaps** to ensure successful delivery:

1. **Roadmap & Prioritisation** – Sequence epics into MVP and subsequent phases with clear timeframes.
2. **Release Planning & Milestones** – Define alpha, beta, and GA targets with acceptance criteria.
3. **Stakeholders & Dependencies** – Identify cross-functional teams and technical/data dependencies early.
4. **Global KPIs** – Set adoption, performance, and satisfaction metrics beyond epic-level criteria.
5. **Risk Register** – Capture technical, compliance, and adoption risks with mitigation strategies.
6. **Testing & QA Strategy** – Define unit, integration, UAT, and compliance testing plans.
7. **Post-Release Maintenance & Support** – Outline bug triage, incident response, and model retraining processes.
8. **Integration Readiness** – Validate API access, data quality, and environment provisioning.
9. **Governance** – Define ownership, decision-making authority, and escalation paths.
10. **Model Deployment & Evaluation Plan** – Detail datasets, evaluation, and drift-monitoring processes.

Once we align on these, we’ll have a complete execution plan to guide engineering through delivery and beyond.