| **Product** | **Feature Set** | **Epic Title** | **Classification** | **Model-heavy** | **Data-heavy** | **UX-heavy** | **Why** | **Core Features** | **Success Criteria** | **Dependencies on Platform Epics** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Client Meeting Prep | Meeting Calendar Integration | Outlook-Embedded Client Meeting Prep Activation | Application-Level |  | ✅ | ✅ | Remove context switching | • Event parsing & meeting classification• CRM client match• Embedded panel (Client Insights, Briefs, Script Assistant) | • ≥95% classification accuracy• Context loads ≤2s• ≥75% in-Calendar prep usage | • #9 Data Source Manager & Entitlements• #14 Observability & Telemetry |
| Vertical Insights Recommendation Engine | Meeting Context & Highlights | Application-Level | ✅ | ✅ | ✅ | Quick orientation | • “Recent Updates” feed• Insight chips• Linked research/news | • First useful insight <30s• ≥80% sessions click a chip | • #9 Data Source Manager & Entitlements• #14 Observability & Telemetry |
| Meeting Script or Talking Points Generator | Talking Points Generator | Application-Level | ✅ |  | ✅ | Instant role-specific openers | • Persona tailoring (CEO/CFO)• Section regeneration• Source-linked bullets | • ≤5s generation• ≥60% briefs tailored• ≥90% facts sourced | • #10 Evidence/Citations/Confidence• #13 Model Evals & Quality Gates |
| Vertical Insights Recommendation Engine | Key Metrics & Market Snapshot | Application-Level |  | ✅ | ✅ | Fast, accurate numbers | • Financial tiles• YoY/QoQ changes• Sparklines & metric explainers | • ≥95% data accuracy• Charts load <1.5s• ≥80% satisfaction | • #9 Data Source Manager & Entitlements• #14 Observability & Telemetry |
| TBD | Attendee Intelligence | Application-Level | ✅ | ✅ |  | Relationship context | • Roles & contacts• LinkedIn links• Past meeting themes | • ≥95% role match• Themes for ≥1 attendee in 70% meetings | • #9 Data Source Manager & Entitlements |
| Scenario-based refinement | Deck-Aware Question Anticipation (Script Assistant) | Application-Level | ✅ |  | ✅ | Anticipate client Qs | • File upload & parsing• Slide/topic extraction• Role-specific Q&A• Team share | • ≥70% rate Qs “useful”• ≥50% share rate• ≤5s generation | • #10 Evidence/Citations/Confidence• #13 Model Evals & Quality Gates |
| Meeting Prep Templates | Client Briefs Workspace | Application-Level |  | ✅ | ✅ | Centralize briefs | • Brief list• Templates• Meeting linking• Export | • Time to first brief <15s• ≥60% from templates• ≥99% export success | • #14 Observability & Telemetry |
| Meeting Prep Templates | Client Brief Composer & Export | Application-Level | ✅ |  | ✅ | Produce deliverable | • Edit & regrade sections• Reorder sections• Export to Word/email | • ≥80% briefs sent/exported• Edit+regrade ≤3s/section | • #10 Evidence/Citations/Confidence• #13 Model Evals & Quality Gates |
| N/A | Data Source Manager & Entitlements | Platform-Level |  | ✅ |  | Secure access | • Source selection UI• Entitlement enforcement• Retrieval logging | • 0 entitlement violations• 100% facts have valid source IDs | — |
| N/A | Evidence, Citations & Confidence | Platform-Level | ✅ | ✅ |  | Trust in AI outputs | • Inline citations• “Show sources” toggle• Confidence scores• “I’m not sure” fallback | • ≥95% groundedness• 0 uncited claims• Confidence on all sections | — |
| TBD | Sharing & Distribution Controls | Workflow-Level |  | ✅ | ✅ | Secure collaboration | • One-click send to attendees• Watermarking• Access control | • ≥98% share success• 0 mis-share incidents | • #12 Compliance Checkpoints |
| N/A | Compliance Checkpoints (Pre-Send) | Platform-Level |  | ✅ |  | Prevent restricted content | • Pre-send scanning• Flagging• Compliance routing/review | • 100% flagged items blocked/remediated• <5% false positives | • #9 Data Source Manager & Entitlements |
| N/A | Model Evals & Quality Gates | Platform-Level | ✅ | ✅ |  | Maintain quality | • Golden-set evals• Groundedness & citation tests• Latency/cost benchmarks• Canary framework | • ≥95% groundedness on eval set• P95 latency <5s• Pass safety tests | — |
| N/A | Observability & Telemetry | Platform-Level |  | ✅ |  | Performance visibility | • Prompt/version logging• Retrieval set IDs• Latency, tokens, cost | • 100% requests logged• Latency tracked for all sessions• Prompt versions traceable | — |
| N/A | Instrumentation for Continuous Improvement | Platform-Level | ✅ | ✅ | ✅ | Continuous learning | • Thumbs up/down• Comments capture• Usage heatmaps• Retraining signals | • ≥50% bankers give feedback• Quality scores improve post-updates | • #14 Observability & Telemetry |

Here’s how I’d set **Client Meeting Prep** product-level metrics with a Hamel Dev–style framing—balancing **adoption**, **quality**, and **guardrails**:

## 1. Adoption & Engagement Metrics

**Goal:** Ensure sustained, repeat use in real banker workflows.

* **Trigger-to-Usage Conversion** ≥50% of users who open a meeting invite containing a client meeting click into the embedded prep panel before the meeting starts.
* **Repeat Engagement Rate** ≥40% of unique users who use the panel once return to use it for a different meeting within 2 weeks.
* **In-Context Retention** ≥70% of those who open the panel spend ≥30 seconds in it and interact with ≥2 core features in the same session.

## 2. Quality & Usefulness Metrics

**Goal:** Ensure the prep delivers expert-level value and trustworthiness.

* **Expert Quality Check (Pass Rate)** ≥90% of sampled briefs meet domain expert criteria for accuracy, completeness, actionability, and clarity.
* **Critical Error Rate** ≤1% of briefs contain high-severity factual errors or omissions that could undermine client trust.
* **Feature Utility Score** ≥70% of users rate at least one core feature (e.g., Client Insights, Key Metrics, Talking Points) as “Very Useful” in post-use surveys.

## 3. Guardrail & Risk Metrics

**Goal:** Prevent harm, maintain compliance, and ensure smooth performance.

* **Compliance Violation Rate** 0% of distributed briefs trigger compliance violations post-send.
* **Performance SLAs** Panel loads in ≤2 seconds, key features respond in ≤5 seconds.
* **Data Entitlement Breaches** 0 incidents of users accessing data they’re not entitled to see.

## Why This Structure Works

* **Adoption metrics** track whether the product is getting traction in real workflows.
* **Quality metrics** make sure what’s being delivered is truly valuable and trusted by bankers.
* **Guardrail metrics** protect against reputational, compliance, and technical failures.

If you like, I can now **map these product-level metrics down to epic-level success criteria** so that each epic rolls up into these three pillars. That will give you traceability from product goals → epic metrics → feature metrics.

Do you want me to do that mapping next?