| **Old Title** | **Investment Banker-Friendly Title** | **Rationale** |
| --- | --- | --- |
| **Scenario-Based Exercise** | **Exec Reaction Simulator** | Tells you it simulates how an exec would respond — plain and powerful |
| **Recap of Sources** | **Source Summary Tracker** | Focuses on tracking & surfacing data origin — bankers care about sourcing |
| **AI-Powered Deal Navigator** | **Comparable Deal Finder** | “Comparable” is standard banker lingo; “Deal Finder” is to the point |
| **Industry-Aware Intelligence + Sector News + Sector-Specific Pointers (Merged)** | **Vertical Insights Engine** | Speaks to surfacing insights tailored to a specific sector |
| **Post-Meeting Follow-Up** | **Client Follow-Up Assistant** | Clearly helps with post-meeting actionables — clean and descriptive |
| **Expert Quote & Stat Snippets** | **Quote & Stat Auto-Insert** | Highlights automation and relevance — shows it plugs into pitch content |
| **Cross-Vertical Intelligence Connection** | **Cross-Sector Trends** | Investment bankers love macro insights — short and intuitive |

Great — here's a full set of **investment banker-friendly feature cards**, using the sharp new titles we just created. I’ve grouped them into two categories: **Foundational Infrastructure** and **Pitch & Meeting Support**, following how most bankers think about tooling (infra vs use-case).

## 📊 Pitch & Meeting Support Features

### 3. Exec Reaction Simulator

**What It Does:** Simulates how a typical executive (e.g., FinTech founder, CPG CEO) might respond to your pitch.  
 Helps fine-tune messaging based on exec persona and tone.

**Output:**

* Simulated exec feedback
* Messaging suggestions per persona

**Personas:** MD, VP/Dir, Analyst

### 4. Source Summary Tracker

**What It Does:** Summarizes all new sources used in a pitchbook.  
 Compares against previously used sources to prevent redundancy and ensure freshness.

**Output:**

* Source recap summary
* Highlighted changes vs. past decks

**Personas:** MD, VP/Dir, Analyst

### 5. Comparable Deal Finder

**What It Does:** Helps search for past deals that match your current pitch — by industry, geography, size, or client type.  
 Auto-tags relevant precedents for easy use in pitchbooks.

**Output:**

* Suggested precedent transactions
* Auto-tagged deal references for pitch

**Personas:** MD, VP/Dir, Analyst

### 6. Vertical Insights Engine *(merged)*

**What It Does:** Provides up-to-date sector-specific news, pre-built prompts tailored to that sector, and awareness of industry-specific language nuances.  
 Acts as a structured knowledge base to give teams a head start.

**Output:**

* Sector news brief
* Tailored prompts for each pitch
* Industry-specific tone guidance

**Personas:** MD, VP/Dir, Analyst  
 **Tag:** Foundational

### 7. Client Follow-Up Assistant

**What It Does:** After a client meeting, this tool identifies key discussion points and suggests follow-up articles, insights, and data to send.  
 Helps maintain client engagement.

**Output:**

* Suggested articles or data sets
* Auto-generated follow-up note content

**Personas:** MD, VP/Dir, Analyst

### 8. Quote & Stat Auto-Insert

**What It Does:** Auto-surfaces expert quotes and relevant stats for your pitchbook based on topic and sector.  
 Saves hours of Googling and data mining.

**Output:**

* Curated quote snippets
* Industry benchmarks and stats

**Personas:** VP/Dir, Analyst

### 9. Cross-Sector Trends

**What It Does:** Surfaces insights and patterns that cut across verticals — e.g., how AI adoption in FinTech parallels trends in Healthcare or Industrials.  
 Helps bankers think laterally and pitch more strategically.

**Output:**

* Cross-industry insight cards
* Deal examples from adjacent sectors

**Personas:** MD, VP/Dir, Analyst

Let me know if you want these exported into a formatted doc (Notion, Miro-style board, PowerPoint slide cards) or prioritized by impact vs effort.

Unmerged Features (Re-Titled for Bankers)

| **Original Feature** | **Banker-Friendly Title** | **Rationale** |
| --- | --- | --- |
| **Like/Dislike** | **Feedback to Improve AI** | Emphasizes impact; "Like" alone is vague, but feedback loop is familiar |
| **Undo/Clear** | **One-Click Undo** | Simple, action-oriented — bankers want control without friction |
| **Trust Badge** | **Source Confidence Badge** | “Badge” stays familiar; “Confidence” clarifies what it represents |
| **Personalized AI Settings** (if kept separate) | **AI Settings Panel** | Clear, generic control panel language — like “gear icon” settings |
| **FAQ** | **Help Hub** | Straightforward, speaks to what it is without jargon |
| **Prompt Engineer Training** | **Write Better Prompts** | Action-oriented, practical — matches banker productivity framing |

| **New Feature Title** | **Merged From** | **Notes** |
| --- | --- | --- |
| **Source Controls & Traceability** | Clear Sources, Source Reveal Toggle, Select Preferred Sources, Data Index Catalogue | Combines source transparency, toggling, and source preferences |
| **Explainable AI & Output Clarifications** | Explainable AI, Inline Clarification, Version History, (optionally) Personalized AI Settings | Includes output explanations and transparent change logs |

Great! Below is the **final set of banker-friendly feature cards** for the merged and unmerged trust/transparency/user control features. Each card includes:

* **Feature Title** (banker-friendly)
* **What It Does** (clear explanation in banker language)
* **Output** (what the user gets)
* **Personas** (MD / VP / Analyst)

## 🔧 Infrastructure & Trust Features

### 1. Trusted Source Manager

**What It Does:** Gives users full control over sources used in pitch content.  
 Toggle source visibility on/off, select preferred data sources, and access a searchable catalogue of industry-specific sources.

**Output:**

* Clickable citations
* Customized source list
* Sector-specific source suggestions

**Personas:** MD, VP/Dir, Analyst

### 2. Why This Slide?

**What It Does:** Explains why a particular slide, stat, or recommendation was generated by the AI.  
 Users can ask “Where did this come from?” or “Why was this included?”  
 Also provides a full edit trail and version history for transparency.

**Output:**

* AI rationale summary
* Interactive clarification (chat-like)
* Version log of all AI-generated changes

**Personas:** MD, VP/Dir, Analyst

### 3. Source Confidence Badge

**What It Does:** Displays a badge next to AI output indicating the level of confidence based on source quality.  
 Think of it like a red/yellow/green signal that flags how strong the supporting data is.

**Output:**

* Visual trust indicators on slides
* Confidence % sourced from data

**Personas:** MD, VP/Dir, Analyst

### 4. AI Settings Panel

**What It Does:** Allows users to tweak how the AI operates — like prioritizing certain data types or increasing the weight of particular inputs (e.g., recent deals, market data, expert opinions).

**Output:**

* Tuned AI responses
* Control panel for decision logic

**Personas:** VP/Dir, Analyst

### 5. One-Click Undo

**What It Does:** Enables users to instantly undo any AI-generated change, giving them full control and flexibility without breaking their workflow.

**Output:**

* Undo history
* Immediate rollback of edits

**Personas:** VP/Dir, Analyst

## 👤 User Empowerment & Support Features

### 6. Feedback to Improve AI

**What It Does:** Lets users like or dislike individual AI outputs to help tailor the system over time.  
 Signals that Aiden is learning and adapting to the banker’s preferences.

**Output:**

* AI learns from feedback
* Smarter future suggestions

**Personas:** MD, VP/Dir, Analyst

### 7. Help Hub

**What It Does:** A searchable help center where users can ask how features work, troubleshoot issues, or get examples — possibly powered by GenAI.

**Output:**

* Instant answers to FAQs
* Onboarding and workflow help

**Personas:** VP/Dir, Analyst

### 8. Write Better Prompts

**What It Does:** Helps bankers fine-tune how they talk to Aiden.  
 Uses frameworks like RISEN to improve prompt clarity, accuracy, and relevance.

**Output:**

* Prompt-writing suggestions
* Examples for different pitch types

**Personas:** VP/Dir, Analyst

Let me know if you’d like:

* A **visual version** of this (Notion, slide deck, Miro-style board)
* A **prioritized roadmap** for MVP vs. V1.5
* Mapping to broader themes like **Adoption, Trust, Speed, or Differentiation**

I'm happy to help on next steps.