| **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.