| **Step** | **Element** | **Description** |
| --- | --- | --- |
| **Entry Point** | **Client Meeting Prep → “Launch Note” Button** | Banker is reviewing the prep brief for an upcoming client call (e.g., ServiceNow M&A). They click **“Launch Note”**, which opens the contextual note-taking view in the split screen. |
| **1** | **Auto-Load Pre-Context** | Prep brief details (company profile, last note, deal status, prior valuation signals) are loaded in a **read-only left pane**. The **right pane** is a fresh note canvas. |
| **2** | **Live Note Capture** | User begins taking notes:• Typed manually• Drag-and-drop transcript• Pull from meeting platform (Zoom, Teams) |
| **3** | **Context-Aware Enhancements** | As banker types, smart prompts emerge:• “Tag valuation anchor?”• “Track sentiment shift?”• “Flag buyer constraint?”Banker controls AI suggestions. |
| **4** | **Smart Summary + Timeline Anchor** | After call ends, the app auto-generates:• Key Points• Sentiment Tracker• Timeline updates• Context tags (e.g., “Valuation moved from 2.2x → 1.9x”) |
| **5** | **Threaded Integration** | Note links back to:• Client’s deal timeline• CRM record• Prior meetings |
| **6** | **Next Action Prompt** | “Prep next meeting?” → Brings forward relevant threads and suggests new objectives. |

### Step 1: AutoLoad Pre-context – Detailed Scenarios

#### Scenario A: User launches the note *before* the call starts

* **Use Case**: The banker opens the note canvas 5–10 minutes before the meeting begins.
* **Behavior**:  
  + The system loads the **prep context** and applies a **template** based on the meeting type (e.g., “Origination”).
  + Note canvas is in **edit mode**, with no live transcription.
  + A passive indicator appears: *“Meeting starts in 7 minutes. Transcription will activate when call begins.”*
  + User can pre-fill: agenda items, talking points, expectations.

✅ This mode supports proactive bankers who plan ahead and want to sketch talking points before the discussion starts.

#### Scenario B: User launches the note *after* the call has started

* **Use Case**: The call is already in progress; user clicks "Launch Note."
* **Behavior**:  
  + System detects the active Zoom/Teams/Webex meeting.
  + Loads meeting prep context + current call metadata.
  + **Live transcription begins immediately**, timestamped to call start.
  + The note canvas shows a visual indicator: *“Capturing from 2:07 PM — synced with transcript.”*

✅ This is for users who delay opening notes but still want full capture and context alignment.

#### Scenario C: Call begins, but user hasn’t launched notes yet

* **Use Case**: User forgets to launch note manually.
* **Behavior Options** (depending on product decision):  
  + **(a) Passive Transcription Mode**: System auto-captures the transcript silently in the background.  
    - Later prompts: *“Missed the note? Click here to reconstruct from today’s call.”*
    - Gives option to retro-tag conversation flow into the appropriate structure.
  + **(b) No auto-capture**: Warns user post-call: *“No note was launched. Would you like to generate one from meeting transcript?”*

🔄 Trade-off between compliance/privacy defaults vs. usability — we recommend (a) for trusted enterprise clients with secure integrations.

### 🔄 Optional Enhancements

* “🧠 **Pre-fill Mode**”: Lets users jot thoughts pre-call. Becomes read-only once call starts and switches to live mode.
* “📡 **Live Sync Mode**”: Follows transcript in real-time and nudges user with tag suggestions mid-call.
* “🕒 **Missed Call Catch-up**”: If no note was launched, it still reconstructs from transcript afterward.





