# **Client prospectus journey planning for UX team**

### Project Overview

* Developing client prospector tool for investment bankers
* Need to balance structured screening approach with Q&A functionality
* Tool must incorporate multiple data sources including patents, trials, funding rounds

### Design Requirements

* Initial view should show:
  + Dynamic news ticker for relevant company events
  + Prompt builder for filtering companies
  + Key metrics (ARR, market cap) alongside company names
* Must demonstrate data source availability to users
* Include relationship mapping capabilities across bank network
* Allow hybrid approach: suggested prospects + user-driven search

### Sector-Specific Considerations

* Tech sector:
  + Focus on ARR, funding rounds, and market cap
  + Include vendor spend relationships
  + Track patent filings and hiring patterns
* Healthcare/Biotech:
  + Include companies pre-revenue with high valuations
  + Track clinical trials and patent approvals
  + Monitor funding rounds
* Need to validate approach for other sectors (energy, real estate)

### Data Integration Points

* Multiple proof points required for prospect identification:
  + Financial metrics (ARR, market cap)
  + Funding rounds
  + Patent/trial data
  + Social sentiment
  + App downloads/usage
  + Web traffic
* Relationship network data crucial for prospect targeting

### Next Steps

* Review existing designs from investor day presentation
* Sal to continue competitor analysis (including Harvey)
* Connect with Steve regarding deal pipeline capabilities
* Need to validate approach with different banking sectors
* Focus on completing note taker workflow first before advancing client prospector