# **Pitchbook changes and prototype review**

### Demo Overview

* Team presented two major features:
  + Pitchbook Creator with enhanced UI/UX
  + Client Meeting Prep Agent with dynamic briefing capabilities
* Demos prepared for broader presentation tomorrow

### Pitchbook Creator Updates

* Added data source selection capability within prompt bar
  + New icon allows selection of specific data sources (SEC, CRM)
  + Enables targeted querying against selected data
* Enhanced new slide creation functionality
  + Added prompt builder interface
  + Allows selection of audience, purpose, and specific elements
* Maintained core capabilities:
  + Content draft generation and replacement
  + Chart editing functionality
  + Team slide updates
  + Transaction tile management

### Client Meeting Prep Agent Features

* Dynamic morning brief with:
  + Top 5-10 key points about company
  + Last updated timestamp
  + Source attribution for each insight
* Expandable sections with detailed company information:
  + Company snapshot
  + Financial performance
  + Public sentiment
  + Internal coverage relationships
* Interactive capabilities:
  + Users can elaborate on talking points
  + Generate printable briefs
  + Track editing history
* Planned collaboration features for team editing

### Key Feedback Points

* Need to make Pitchbook Creator more Gen AI-centric in user experience
* Reduce morning brief points from 10 to 5 most relevant items
* Add historical pitch access for similar companies in sector
* Include underlying source attribution at bottom of slides
* Improve connection between brief highlights and detailed sections
* Consider dynamic content based on:
  + Meeting timing
  + User seniority
  + Recent events (earnings, news)

### Implementation Considerations

* Must balance Gen AI capabilities with banker comfort level
* Need to standardize brief sections across all meeting types
* Consider integration with Note Taker for meeting history
* Ensure CRM data flows into relationship insights
* Plan for workspace collaboration requirements

### Next Steps

* Clean up prototypes for tomorrow’s presentation
* Update Aiden Banking naming to Aiden Banker
* Add earnings example to data source demonstration
* Implement source attribution on slides
* Review brief content generation approach for real-world accuracy