## Story: Talking Points in Outlook (Desktop)

**As a**coverage banker preparing for client meetings

**I want to**see auto-generated “Talking Points” based on entitled research, news, and internal notes, with options to tailor for specific personas (e.g., CEO, CFO) and add to my client brief or meeting script

**So that**I can quickly prepare focused, role-relevant talking material without manually combing through multiple content sources.

### Dependencies

* Outlook Desktop add-in framework for panel rendering and actions
* Client resolver/CRM to identify meeting client and attendee roles
* Retrieval layer for entitled research, news, and notes
* Generation service for point creation and persona tailoring
* Entitlement service to filter non-accessible content
* Brief/Script APIs to append selected points

### Acceptance Criteria

1. Section loads automatically in the meeting context with correct client detected
2. Points are tailored based on retrieved content and selected persona
3. Users can add any point to Client Brief or Script
4. Citations are displayed and preserved when points are tailored or regenerated
5. Meets agreed performance targets

### Business Requirements

* Available in Outlook panel UI
* Support tailoring to predefined personas (CEO, CFO, CIO, etc.)
* Handle 5–7 talking points without truncation
* Include citations linked to entitled content

### Performance Requirements

* Visible header ≤ 1.5 s (p95)
* First 3 points ≤ 3 s after expand (p95)
* Persona tailoring/regeneration ≤ 2.5 s (p95)
* Add-to actions complete ≤ 3 s

### Error Handling

* Empty state with refresh/manage sources if no content
* Retain last list if generation fails; allow retry
* Note if points hidden due to entitlements
* Preserve selections if add-to action fails

### Non-Functional Requirements

* Strict entitlement enforcement; no caching of restricted content
* Audit logs for key actions
* p99 failure rate < 0.5%
* Accessibility via ARIA roles
* UI strings externalized for localization

### Definition of Done

* Talking Points render with persona tailoring and citations
* Add-to Brief/Script works reliably
* Regeneration preserves citations and scroll
* Meets latency and accuracy requirements
* Telemetry visible in dashboards

### Quality & Telemetry

* Core UI, retrieval, and generation flows verified via automated tests
* End-to-end test for persona tailoring and add-to actions
* Telemetry tracks usage, performance, and error events with clear KPIs
* Dashboard reports on adoption, latency trends, and failure rates

# **Story: Attendee Overview (with Smart Prompts)**

**As a** coverage banker preparing for a client meeting

**I want to** see a clean list of meeting attendees (name, title, firm, email, LinkedIn) **and** get **smart, context-aware follow-up prompts** per attendee

**So that** I can quickly recall relationship context and generate targeted prep (and add it to my brief or script) without digging through notes.

## Dependencies

* Outlook Desktop add-in shell (Client IQ → *Attendee Overview* section)
* Calendar/Graph for invitee list; CRM/contact directory for roles/titles
* Internal notes/briefs store for past meetings; entitlement service
* Generation service (for smart prompts → answers) with retrieval to entitled notes
* Links/enrichment: LinkedIn URLs; Brief/Script write APIs
* Observability pipeline (events/latency/errors)

## Acceptance Criteria

1. **Section & list**
   * Expanding *Attendee Overview* shows each attendee: avatar/initials, name, title, firm, email link, LinkedIn link.
2. **Smart prompts (chips) per attendee**
   * For each attendee, show **1–2 prompt chips** generated from entitled history (e.g., last 5 meetings, briefs).
   * If no history exists, show **fallback prompts** (e.g., “Draft intro based on role”, “Suggest 3 questions for the CFO”).
3. **Prompt execution & output**
   * Clicking a chip posts a structured request; the **answer appears in the chat area** beneath the sections.
   * Output includes **inline citations** (source + date) and **Add to Client Brief / Add to Script** actions.
4. **Integrity & entitlements**
   * Only entitled content is considered; links open correctly or show a “not entitled” message.
5. **Navigation consistency**
   * Returning to *Attendee Overview* preserves expand/collapse state and last generated result in the chat pane.

## Business Requirements

* Ship with **two default prompt templates**:  
  1. “Summarize strategic themes from the last *N* meetings with {Attendee}.”
  2. “Highlight recent financial topics discussed with {Attendee}.”
* Users can **add outputs** to Client Brief or Script with citations preserved.
* Works in **native Outlook panel**;

## Performance (high-level)

* Section renders promptly after Client IQ loads; prompt answers should be **fast enough to stay in flow** (target a few seconds).
* Adding to Brief/Script returns a quick confirmation.

## Error Handling (high-level)

* If no history: show fallback prompts; never render empty UI.
* If generation fails: show non-blocking retry message; keep prior answers if any.
* If a link isn’t entitled/available: show a small inline notice; allow the user to continue.

## Non-Functional

* **Security/Privacy:** enforce entitlements at retrieval; do not cache non-entitled text client-side.
* **Auditability:** log prompt → sources used → output actions (added to Brief/Script).

## Definition of Done

* Attendee list + working email/LinkedIn links render for any invited meeting.
* Smart prompt chips appear per attendee (or fallbacks where no history).
* Clicking a chip generates an answer in chat **with citations** and **Add to Brief/Script** actions that work.
* Basic telemetry visible for usage and latency.

## Quality & Telemetry (lightweight)

* Smoke tests: attendee list render, chip render, chip click → answer, add-to-brief/script, entitlement filtering.
* Events: attendee\_view\_open, prompt\_chip\_shown, prompt\_chip\_clicked, gen\_success/fail, add\_to\_brief, source\_click, simple latency timers.

**Story:** View & Manage Client Briefs

**As a** coverage banker preparing for multiple client meetings

**I want to** view a consolidated list of all upcoming and past client briefs, with the ability to open, edit, save as templates, or attach them directly to a meeting

**So that** I can quickly locate and prepare the relevant client brief without manually searching across folders or emails

### Dependencies

* Internal database or content repository containing all client briefs
* Meeting calendar integration to match briefs with scheduled meetings
* Document viewer/editor API for Word
* Access control & entitlement checks for each client brief

### Acceptance Criteria

1. **Display Logic:**
   * Show list of briefs sorted by due date
   * Label each brief with client name, date, and type (e.g., Client Insights, Meeting Link)
2. **Actions Available:**
   * Open in native editor (Word/PPT)
   * Save as template
   * Attach to meeting
3. **Performance:**
   * Load list of briefs in < 2 seconds
4. **Access Control:**
   * Only users with appropriate entitlements can open/edit

### Business Requirements

* Available to open in Word formats
* Supports search/filter by client name, date, or brief type
* UI must clearly differentiate between **upcoming** and **past** briefs

### Definition of Done

* Meets latency and entitlement accuracy requirements
* Functional in both native app and web UI
* All actions (Open, Save as Template, Attach to Meeting) tested and verified in staging