## 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