Hi [Manager's Name],

I’ve been revisiting the design of our **agent-specific UIs**, starting with the *Meeting Prep Agent*, and wanted to share both the thinking behind the changes and where we’re heading.

### 🧠 What’s Broken with the Old UX

Looking at the current screen (see attached), we’re still in the **“Old World”** — traditional enterprise UI built on fixed layouts, buttons, and static copy. It’s helpful, but passive. Users are expected to figure out what the AI can do and initiate all actions.

To move toward a **GenAI-native experience**, we need to invert that model — shifting from user-led form filling to **assistant-led orchestration**.

### 🔁 Old World vs. GenAI World

| **Old Webapp World** | **GenAI-native World** |
| --- | --- |
| User picks tools manually | AI suggests next best action based on context |
| Static dashboard and empty canvas | Dynamic, personalized conversation on page load |
| One action per click | Multi-step suggestions that chain into workflows |
| Text fields, filters, dropdowns | Conversational input and smart prompt buttons |
| AI waits for instructions | AI acts as a proactive teammate |
| Siloed UI per use case | Seamless cross-agent orchestration |

### 🔧 What’s Changing in the Agent UX

When the user clicks into *Meeting Prep Agent*, we now detect:

* Who the meeting is with (e.g., ServiceNow)
* When it's happening (e.g., Friday at 3:00 PM)
* Who's attending (e.g., Jane Doe, CFO)
* Past relationship context (e.g., CRM notes, previous calls)
* Document packages and filings linked to the meeting

Then, instead of showing an empty canvas, we display a contextual message like:

*“Want help prepping for your call with ServiceNow this Friday at 3:00 PM?”*

Under that, we surface **smart, high-leverage prompts** — and this is where I’ve gone beyond just utility.

### 💡 Example “Aha” Prompts for the Meeting Prep Agent

| **Smart Prompt** | **Why it’s an "Aha"** |
| --- | --- |
| “Based on Jane Doe’s last Q&A, draft a tailored objection-handling slide” | Feels hyper-personalized — like a real assistant read the past |
| “Summarize ServiceNow’s most recent cost-cutting initiatives and how they’ve impacted margins” | Shows the model understands not just filings, but *strategy* |
| “Identify signals from the last 2 analyst calls that could shape Friday’s discussion” | Integrates external voice-of-market with internal prep |
| “Draft 3 client concerns RBC has heard from peers in this sector recently” | Leverages institutional knowledge |
| “Compare ServiceNow’s LTM revenue mix vs. our last 3 AI-infrastructure deals” | Cross-agent: pulls in deal history + market data in one shot |

The goal is to move from **“Here’s what you asked for”** to **“Here’s what you *should* be thinking about.”**

### 🌐 Behind the Scenes: Data + System Integrations

These intelligent prompts rely on integrations that enable real-time context:

* 📆 **Calendar API** — to detect meeting time, attendees, duration
* 🧾 **CRM (e.g., DealCloud, Salesforce)** — for prior touchpoints, ownership, call notes
* 📂 **Document Storage (e.g., Box, VDR)** — to summarize linked materials (term sheets, diligence docs)
* 🧠 **Market Intel (e.g., FactSet, AlphaSense, EDGAR)** — for filings, earnings, comps
* 📧 **Email (opt-in)** — to flag pre-meeting threads or attachable content

### 🛣️ What’s Next

* Integrating these changes into all primary agent types (e.g., Deal Drafters, Pitchbook Creators)
* Enabling agent chaining (e.g., prep → pitchbook → follow-up email)
* Adding a memory layer to recognize user behavior across sessions

Let me know if you'd like a walkthrough — happy to demo the new interaction model in context.

Best,  
 [Your Name]