Got it 👍 — you want **Talking Points** written up with the same **developer-friendly specificity and structure** I just did for **Key Financial Metrics**. That means: grouped requirements, clear distinction between **First-Time Client** vs **Returning Client**, explicit **data sources**, and **logic** that engineers can easily turn into system prompts.

Here’s the full spec:

# **02.03.xx Client Insights – Talking Points**

### 1. Relationship & Icebreakers

**First-Time Client**

* **Data Sources**: LinkedIn/BoardEx (exec bios), Public Websites (press releases, awards), Crunchbase (founders, funding history).
* **Logic**:  
  + Pull executive/attendee bios (title, tenure, background).
  + Identify personal/professional highlights (awards, recognition, tenure milestones).
  + Generate 2–3 “icebreaker” sentences bankers can open with (e.g., “Congratulations on your expansion into APAC last quarter”).

**Returning Client**

* **Data Sources**: CRM/Call Notes (prior rapport notes), Internal Memos, LinkedIn (new role changes).
* **Logic**:  
  + Pull rapport items or personal references mentioned in last meeting.
  + Highlight attendee role/status changes since last call.
  + Generate continuity phrases (“Last time we discussed your expansion project — how has that progressed?”).

### 2. Strategic Alignment

**First-Time Client**

* **Data Sources**: CapIQ (strategic initiatives, financial disclosures), Broker Reports (industry outlook), Crunchbase (expansions, partnerships).
* **Logic**:  
  + Identify stated corporate objectives (growth, capital raising, acquisitions).
  + Link industry trends to company’s strategy.
  + Frame 2–3 questions that test banker understanding of client goals (“We understand digital transformation is a top priority — how are you approaching this internally?”).

**Returning Client**

* **Data Sources**: CRM (last meeting goals), Deal Logic (active opportunities), Broker Reports (updated industry context).
* **Logic**:  
  + Retrieve strategic themes discussed last time.
  + Flag any change in strategy since last call (new disclosures, new sector push).
  + Generate prompts framed as progress checks (“You mentioned a focus on deleveraging — has that continued to be your priority?”).

### 3. Opportunities & Recommendations

**First-Time Client**

* **Data Sources**: Broker Reports (peer moves, analyst insights), CapIQ (comparable deals), Crunchbase (partnership activity).
* **Logic**:  
  + Scan peers for notable actions (M&A, capital raises).
  + Generate 3–5 **actionable opportunities** relevant to client.
  + Structure recommendations as **conversation openers**, not prescriptive advice (e.g., “We’re seeing consolidation in your sector — have you considered potential acquisition targets?”).

**Returning Client**

* **Data Sources**: CRM/Call Notes (unresolved opportunities), CapIQ (financial deltas), Broker Reports (estimate revisions).
* **Logic**:  
  + Anchor to opportunities raised in last meeting → check if any movement since.
  + If progress observed (deal executed, market moved), surface that as context.
  + Generate 2–3 **new opportunities** informed by recent changes (e.g., “Given your debt reduction last quarter, you may now be better positioned for M&A activity”).

## ✅ Developer Notes

* **First-Time Client Mode** =  
  + Focus on *introducing* the client: bios, strategic objectives, peer context, broad opportunities.
* **Returning Client Mode** =  
  + Focus on *continuity*: recap commitments, check progress, highlight new opportunities since last meeting.
* **System Prompt Requirement**:  
  + Always output Talking Points as **3 grouped sections**:  
    1. Relationship & Icebreakers
    2. Strategic Alignment
    3. Opportunities & Recommendations
  + Each talking point must reference its **data source** and be **framed as a conversation starter**, not raw facts.
* Must **separate facts (Recent Updates)** from **insights (Talking Points)** — devs should never mix raw news with scripted talking prompts.

Would you like me to also **lay this out in a side-by-side table** (rows = the 3 groups, columns = First-Time vs Returning Client) just like your Key Metrics section — so your developers see the scope differences instantly?