[Skip to content](https://chatgpt.com/c/68b1904f-15b4-8331-ad09-7fad04971c02#main)

## Chat history

##### You said:

Hey, I'm building a, um, so I'm building a client meeting prep, uh, agentic workflow for investment bankers. And one of the things that I'm struggling with to figure out is, um, one of the things on that platform is the ability to connect to various data sources, both external and internal, and then it's deeply invested in the investment banking workflow. So a banker can look at all his future meetings and, um, in his Outlook and he could, and he could basically be launched into a client meeting prep by double-clicking on the Outlook. And that takes him into an application where, uh, he can see everything about, uh, uh, meeting with the client. Now, what I'm struggling to figure out is what is the experience for a new client? So imagine that, uh, I've never spoken to that client. What would that experience look like? And imagine I'm coming to a client for which I have had repeated calls. And for that, I think the task is more like what has all, what has been all the updates since the last time we actually met. And so I'm trying to figure out like what should be in that client meeting prep. Um, and so let's nail it down to two sections. One is all the recent updates that have happened. One is talking points. The other is key financial metrics. So these are the three sections. Let's go with these three key sections. What should I be looking at when I'm, when I'm, when I'm doing this?

###### ChatGPT said:

Thanks for the context—this sounds like a powerful tool. To tailor the research, could you clarify a few things:

1. For "recent updates," should the system pull from internal CRM data, public news sources, filings, or a mix?
2. For "talking points," are you looking for deal-relevant talking points (e.g., sector activity, peer movements), or personalized ones (e.g., exec background, strategic initiatives)?
3. For "key financial metrics," are you thinking about a specific set (e.g., revenue, EBITDA, debt ratios), or do you want guidance on which to show based on context (sector, deal type, etc.)?
4. Should we also consider regulatory context or legal sensitivity in what's shown to the banker?

Let me know so I can dig into the most relevant strategies and tools for each section.

##### You said:

1. All, 2. All, 3All 4 No

###### ChatGPT said:

Got it. I’ll explore how to build a comprehensive client meeting prep experience for investment bankers, focusing on three key sections: recent updates, talking points, and key financial metrics—drawing from all internal and external data sources.

I’ll be back shortly with detailed recommendations and best practices for each section.

Client Meeting Prep Workflow for Investment Bankers

# **Key Sections of Client Meeting Prep for Investment Bankers**

When preparing for a client meeting as an investment banker, you should organize information into three key sections: Recent Updates, Talking Points, and Key Financial Metrics. The focus of each section may differ slightly for a new client (where you need a comprehensive overview) versus a returning client (where the emphasis is on changes since the last meeting). Below is what to include in each section and what to look for:

## All Recent Updates 📈

This section compiles the latest developments related to the client’s company, industry, and any prior engagements. For a first-time meeting, gather a broad overview of recent events; for a repeat meeting, concentrate on what has changed since your last interaction. Key areas to research include:

* Company News and Announcements: Check the company’s website and press releases for any new product launches, leadership changes, mergers/acquisitions, partnerships or other major announcements
* [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=What%20direction%20is%20the%20company,announcements%20like%20mergers%20or%20acquisitions)
* [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=Resources%20that%20identify%20overall%20company,after%20the%20leadership%E2%80%99s%20prepared%20statements)
* . For example, note if they’ve undergone a management shakeup, launched a new initiative, or made a big strategic move recently. These events provide context and potential talking points.
* Industry and Market Developments: Scan news sources and industry reports for recent trends or events that could affect the client. This includes regulatory changes, market shifts, or competitor actions. Be aware of any new competitors or disruptive technologies in their space, as well as any competitor news (e.g. a rival’s merger or product launch)
* [reddit.com](https://www.reddit.com/r/PublicRelations/comments/1ldj3zb/tips_to_prep_for_a_client_meeting/#:~:text=Know%20the%20company%E2%80%99s%20general%20history%2C,just%20have%20a%20general%20awareness)
* . This ensures you understand the broader landscape in which the client operates. Also, do a quick media scan on the morning of the meeting to catch any last-minute news about the company or industry
* [reddit.com](https://www.reddit.com/r/PublicRelations/comments/1ldj3zb/tips_to_prep_for_a_client_meeting/#:~:text=and%20DO%20NOT%20forget%20to,you%20know%20the%20absolute%20latest)
* .
* Internal/CRM Updates: If your firm has prior interactions with the client, review your CRM or internal notes for updates. For a returning client, look at what’s happened since the last meeting – for instance, any follow-up emails, new materials the client requested, or progress on action items. If you promised analysis or the client was awaiting some outcome, make sure to have those updates.
* Financial Disclosures: Review the client’s latest earnings reports or investor calls for new information. Read recent quarterly or annual results and earnings call transcripts to identify any updated forecasts, guidance, or notable statements from management
* [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=Resources%20that%20identify%20overall%20company,after%20the%20leadership%E2%80%99s%20prepared%20statements)
* . If it’s a public company, also note if they issued any 8-Ks or interim updates since your last meeting.
* Executive Moves or Biographical Info: Especially for a new client, note any changes in key personnel. If they have a new CEO/CFO or other executives, that’s a critical update. Also, understand *who* you’re meeting: how long the contacts have been in their positions and their backgrounds
* [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=)
* . A promotion or new hire since you last spoke could change the client’s priorities or decision-making process.

By gathering these recent updates, you ensure you won’t be caught off-guard by something the client expects you to know. It allows you to walk into the meeting fully aware of the client’s current situation and the context in which they’re operating.

## Talking Points 💬

This section outlines the agenda and key discussion topics for the meeting. Talking points should be tailored to the client’s situation, demonstrating that you understand their needs and have valuable insights or solutions to offer. The content will differ for new versus ongoing relationships, but in general you should prepare to cover:

* Follow-Ups from Last Meeting (if applicable): For an existing client, begin with any unfinished business. Address questions raised previously and report on promised deliverables. For example, if you agreed to draft a valuation or explore a deal opportunity, summarize what you found. This shows reliability and continuity.
* Client’s Objectives and Strategy: Be clear on what the client is trying to achieve in their business currently. Research the client’s current business objectives, initiatives, and strategy
* [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=)
* . For a first-time meeting, you might ask open-ended questions to confirm their goals (“We understand from public statements that expanding in Asia is a priority — is that a key focus for you right now?”). For a returning client, reference their stated goals and discuss any progress or changes (“Last time you mentioned streamlining operations; how has that been progressing?”). Aligning the conversation with the client’s strategy shows that you “get” their business.
* Key Challenges or Pain Points: Identify the challenges the client or their industry is facing so you can bring them up proactively. This might include market headwinds, a new competitor in their space, regulatory hurdles, or internal issues like high debt or succession planning
* [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=With%20economies%20and%20technologies%20ever,been%20a%20recent%20management%20shakeup)
* . Acknowledge these pain points and be prepared to discuss how they might be addressed. For example, “I know your sector is seeing increased regulation – we have some thoughts on how companies are adapting that I’d like to share.” This demonstrates foresight and that you’re thinking about their problems.
* Market/Industry Insights: Plan to discuss relevant market trends or recent industry deals and how they impact the client. This could be mentioning a recent industry trend (e.g. rising interest rates, supply chain issues, M&A surge in their sector) and offering your insight on it. By doing so, you position yourself as a knowledgeable advisor. You might say, for instance, “Given the recent uptick in consolidation in your industry, have you considered how a merger might strengthen your market position?” – tailored insights can prompt valuable discussion.
* Opportunities and Recommendations: Perhaps the most important talking points are those that deliver value to the client. Based on your research, prepare a few actionable ideas or recommendations. These could be opportunities for the client (e.g. potential acquisition targets, financing strategies, or new markets to explore) or solutions to their challenges. Showing that you have thought through ways to help them achieve their goals or solve problems will set you apart. *For example:* if you know the client’s goal is to grow via acquisitions, you might come with a short list of target ideas; if they face a high leverage challenge, you might suggest refinancing options. The goal is to “deliver some thoughtful recommendations that address [the client’s] issues”
* [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=Taking%20the%20time%E2%80%94and%20it%20is,business%20partner%20they%E2%80%99ve%20been%20seeking)
* , demonstrating that you’re a partner in their success.
* Relationship and Rapport Items: Don’t forget personal touches. Especially with a new client, prepare to introduce yourself/your team and highlight relevant experience. Also leverage any *personal or professional affinity* you discovered: for instance, congratulating them on a recent award or new product launch, or mentioning a common school or connection (if appropriate). Knowing the biographical background and personal interests of the individuals
* [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=)
* [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=Now%2C%20you%E2%80%99re%20digging%20even%20deeper,mentoring%20women%20or%20young%20people)
* can help here. A simple “Congratulations on your successful product launch last quarter – I saw the coverage in the press” or referencing something you have in common can break the ice and build trust.

Crafting your talking points with the above in mind ensures the meeting is engaging and relevant. You’ll be addressing what the client cares about and demonstrating value. Remember to remain flexible – the client might steer the conversation to certain issues, so be ready to adjust and cover the most important items in depth.

## Key Financial Metrics 💹

In any client meeting prep, it’s crucial to have the client’s key numbers at your fingertips. This section is a financial snapshot of the client’s company, which provides a factual basis for discussion and informs any strategic advice. Depending on whether the client is new or existing, you may include a broader historical overview or focus on recent changes. Key financial metrics and data to gather include:

* Recent Financial Performance: Compile the latest financial results of the company. Look at their revenue and profit figures from recent quarters or years, and note the growth rates or trends. Reviewing the annual report and recent earnings call transcripts is a good way to get these details
* [reddit.com](https://www.reddit.com/r/PublicRelations/comments/1ldj3zb/tips_to_prep_for_a_client_meeting/#:~:text=Know%20the%20company%E2%80%99s%20general%20history%2C,just%20have%20a%20general%20awareness)
* . Note whether revenue is growing or declining, how their profit margins are trending, and any guidance the management has given for upcoming periods. For a returning client, highlight what has changed since the last meeting (e.g. “Q2 revenue was up 10% year-over-year, whereas when we met in Q1 it was flat”).
* Stock Market Metrics (for Public Companies): If the client’s company is publicly traded, be aware of their current stock price and recent stock price history
* [reddit.com](https://www.reddit.com/r/PublicRelations/comments/1ldj3zb/tips_to_prep_for_a_client_meeting/#:~:text=Know%20the%20company%E2%80%99s%20general%20history%2C,just%20have%20a%20general%20awareness)
* . Know the approximate market capitalization and how the stock has performed year-to-date or since the last meeting. For example, has their share price jumped or dipped on any news? Knowing the 52-week high/low can signal how the market sentiment is. This is important not only for context but also if you’re advising on equity financing or shareholder issues.
* Valuation and Market Ratios: Prepare key valuation metrics such as the price-to-earnings (P/E) ratio and enterprise value to EBITDA if available, and how those compare to industry peers. This indicates how the market values the client relative to competitors. If the P/E is much higher or lower than peers, be ready to discuss why (e.g. higher growth expectations or perhaps undervaluation). Also note the earnings per share (EPS) and whether it’s growing
* [netsuite.com](https://www.netsuite.com/portal/resource/articles/accounting/financial-kpis-metrics.shtml#:~:text=The%20five%20primary%20types%20of,equity%20ratio)
* , as investors and bankers often track EPS closely. These figures help in conversations about raising capital or pursuing acquisitions (for instance, using stock as currency in a deal).
* Financial Health & Leverage: Assemble data on the company’s financial strength. This includes their debt levels and leverage ratios – for example, the debt-to-equity ratio and any debt/EBITDA metrics
* [netsuite.com](https://www.netsuite.com/portal/resource/articles/accounting/financial-kpis-metrics.shtml#:~:text=The%20five%20primary%20types%20of,equity%20ratio)
* . A high leverage ratio might suggest limited debt capacity, which is crucial if you’re pitching a debt financing or need to address balance sheet risk. Also check their liquidity metrics (like current ratio or cash on hand) and interest coverage (EBIT/interest expense) to gauge how comfortably they can meet obligations. If the company has a credit rating, know it. These metrics indicate the company’s ability to take on new projects or debt, and they might shape your advice (e.g. recommending equity financing if debt capacity is low).
* Return Metrics and Efficiency: If relevant, note metrics like Return on Equity (ROE) or Return on Assets (ROA), and efficiency ratios (for example, asset turnover or profit per employee). While not always discussed in a client meeting unless it pertains to a specific issue, having them in your back pocket can be useful. They can highlight strengths or weaknesses in the company’s operations. For instance, if ROE is declining, the client might be concerned about shareholder return, which could lead into a discussion of improving performance or strategic shifts.
* Comparison to Benchmarks: To add color to the numbers, compare the client’s key metrics to those of peer companies or industry averages. Knowing that, say, the client’s EBITDA margin is 25% versus an industry average of 20% (or vice versa) is insightful. It can lead to talking points like “Your margins are above industry – perhaps there’s room to invest in growth,” or “Margins are below peers – maybe there’s an efficiency opportunity.” Likewise, tracking how metrics have changed since the last meeting (improved or worsened) shows you’re monitoring their progress.

In summary, the Key Financial Metrics section should equip you with a concise financial profile of the client. It combines historical performance and current financial status, enabling you to confidently discuss any aspect of their business health. Being armed with these numbers – revenue, profit, growth rates, margins, debt, valuation ratios, etc. – will allow you to answer questions on the spot and lend credibility to your suggestions. As one guide notes, companies often track metrics across profitability, leverage, valuation, liquidity, and efficiency to monitor their financial well-being

[netsuite.com](https://www.netsuite.com/portal/resource/articles/accounting/financial-kpis-metrics.shtml#:~:text=The%20five%20primary%20types%20of,equity%20ratio)

. You should do the same in preparation for the meeting, tailoring the metrics to what matters for that particular client (for example, a highly leveraged company vs. a high-growth tech firm will focus on different figures).References:

1. Reddit – Tips on prepping for a client meeting (researching company history, news, financials, competitors)
2. [reddit.com](https://www.reddit.com/r/PublicRelations/comments/1ldj3zb/tips_to_prep_for_a_client_meeting/#:~:text=Know%20the%20company%E2%80%99s%20general%20history%2C,just%20have%20a%20general%20awareness)
3. .
4. BoardEx – *Client Meeting Prep: Five Things to Research Before a Customer Meeting* (advice on researching company strategy, exec changes, objectives, challenges, etc.)
5. [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=What%20direction%20is%20the%20company,announcements%20like%20mergers%20or%20acquisitions)
6. [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=Resources%20that%20identify%20overall%20company,after%20the%20leadership%E2%80%99s%20prepared%20statements)
7. [boardex.com](https://boardex.com/articles/client-meeting-prep-five-things-to-research-before-a-customer-meeting#:~:text=Taking%20the%20time%E2%80%94and%20it%20is,business%20partner%20they%E2%80%99ve%20been%20seeking)
8. .
9. NetSuite – Discussion of common financial KPIs that companies track (profitability, leverage, liquidity, etc.)
10. [netsuite.com](https://www.netsuite.com/portal/resource/articles/accounting/financial-kpis-metrics.shtml#:~:text=The%20five%20primary%20types%20of,equity%20ratio)
11. .







Sources

##### You said:

Can you convert them into business requirement that I can hand off to the engineering team. Just business requirement broken down by first time and returning client interaction for each of the three sections of client meeting prep

###### ChatGPT said:

Perfect — here’s a business requirements breakdown you can hand off to your engineering team. It separates the flows for first-time client vs. returning client across each of the three prep sections.

# **Business Requirements for Client Meeting Prep**

### 1. Recent Updates

First-Time Client

* Data Sources: Aggregate from external news feeds (Bloomberg, FactSet, Reuters), regulatory filings (EDGAR, SEDAR), press releases, industry reports, competitor press/news, and internal research memos.
* Content Requirements:
  + Company overview (business model, history, leadership bios).
  + Last 12 months of company news (M&A, partnerships, product launches, management changes).
  + Industry/sector context (major trends, regulations, competitor moves).
  + Internal firm notes, prior pitches, or coverage from other teams.
* Presentation: One unified “Company & Industry Digest” card, chronologically ordered.

Returning Client

* Data Sources: Internal CRM (DealCloud, Salesforce), banker email/calendar history, deal activity logs, plus external feeds as above.
* Content Requirements:
  + Changes since last recorded meeting (flagged by date filter).
  + Internal memos or CRM entries updated since last interaction.
  + New filings, analyst notes, or press releases since last meeting date.
  + Highlight competitor news in same timeframe.
* Presentation: “What’s Changed Since Last Meeting” card, time-bounded to the last interaction date.

### 2. Talking Points

First-Time Client

* Data Sources: Analyst reports, market intelligence databases, internal strategy docs, management bios, LinkedIn/BoardEx.
* Content Requirements:
  + Introductory context: client’s stated strategic goals (expansion, acquisitions, capital raise, etc.).
  + Industry insights (comparable deals, peer performance).
  + Potential opportunities (M&A candidates, financing options, strategic partnerships).
  + Personal context: background of attendees (career history, education, interests if available).
* Presentation: Generate a “Suggested Discussion Guide” structured as:
  + Icebreaker & relationship building.
  + Strategic alignment (“we understand your objectives are…”).
  + Opportunity prompts.

Returning Client

* Data Sources: Notes from prior meetings, CRM follow-ups, internal deal tracking.
* Content Requirements:
  + Outstanding items or questions from last meeting.
  + Updates on previously discussed opportunities.
  + Industry changes relevant to their strategy since last call.
  + Suggested recommendations tailored to those changes.
* Presentation: “Follow-Up & Opportunities” card, structured as:
  + Recap of prior commitments.
  + Updates.
  + New/next talking points.

### 3. Key Financial Metrics

First-Time Client

* Data Sources: Public filings (10-K, 10-Q, MD&A, SEDAR), financial terminals (Bloomberg, FactSet, CapitalIQ), internal research notes.
* Content Requirements:
  + Last 3 years financials (Revenue, EBITDA, Net Income, Cash Flow).
  + Valuation ratios (EV/EBITDA, P/E, P/B) vs. peer averages.
  + Balance sheet overview: leverage (Debt/Equity, Debt/EBITDA), liquidity (cash, current ratio).
  + Market performance (stock price trends, 52-week high/low, market cap).
* Presentation: Compact “Financial Snapshot” with peer benchmarks.

Returning Client

* Data Sources: Same as above, filtered by “since last meeting” for disclosures and market performance.
* Content Requirements:
  + Quarter-over-quarter changes since last interaction.
  + Analyst estimate revisions since last meeting.
  + Any major balance sheet changes (refinancing, debt raise).
  + Shareholder/market sentiment shifts (ratings changes, large stock movements).
* Presentation: “Updated Financials Since Last Meeting” card with highlights of deltas (↑/↓ indicators).

✅ Engineering Hand-Off Guidance:

* Build two distinct data retrieval flows: First-Time Client Mode and Returning Client Mode.
* Implement a date-based filter anchored on the last recorded meeting to distinguish updates for repeat clients.
* Standardize presentation into modular cards (Digest, Talking Points, Financials) so the UI adapts smoothly across client types.
* Ensure APIs for CRM, calendar, news, filings, and market data are pluggable and can be swapped/extended.

Would you like me to also map this into a table format (First-time vs Returning x 3 sections) so engineers can see it visually and directly in Jira or Confluence?

##### You said:

Can you give a one liner of what the difference is between recent updates and talking points. Seems like the same

###### ChatGPT said:

Here’s a crisp one-liner that separates the two:

* Recent Updates = *What has happened* → factual aggregation of news, filings, CRM notes, and market events.
* Talking Points = *What to say* → curated insights, recommendations, and prompts you should bring into the conversation.

So updates = raw context, while talking points = actionable conversation starters derived from that context.

Do you want me to also frame this distinction in the requirements doc itself so engineers don’t confuse the two when building?

##### You said:

Yes

###### ChatGPT said:

Got it. Here’s a refined business requirements doc with the explicit distinction baked into the hand-off, so engineers don’t conflate the two.

# **Business Requirements for Client Meeting Prep**

### Key Distinction

* Recent Updates = *What has happened* → factual aggregation of events (news, filings, CRM notes, deal logs).
* Talking Points = *What to say* → curated insights, recommendations, and prompts distilled from those updates.

## 1. Recent Updates (What Happened)

First-Time Client

* Data Sources: External (news, Bloomberg, FactSet, EDGAR/SEDAR, press releases, competitor announcements), internal memos, CRM history.
* Content:
  + Company overview and last 12 months of major events.
  + Industry trends and competitor activities.
  + Leadership bios and background.
* Presentation: “Company & Industry Digest” card showing a chronological factual timeline.

Returning Client

* Data Sources: Same as above + CRM and deal activity logs since last meeting date.
* Content:
  + Time-filtered events since last recorded interaction.
  + Updates on competitors during the same window.
* Presentation: “What’s Changed Since Last Meeting” card showing only deltas.

## 2. Talking Points (What to Say)

First-Time Client

* Data Sources: Analyst reports, industry databases, management bios, LinkedIn/BoardEx, internal strategy docs.
* Content:
  + Strategic alignment (goals, growth plans, market positioning).
  + Industry insights (comparable deals, peer performance).
  + Opportunities or recommendations derived from updates (e.g., financing options, M&A targets).
  + Personal context for attendees (career history, notable achievements).
* Presentation: “Suggested Discussion Guide” with sections for: Icebreaker → Strategic Fit → Opportunities.

Returning Client

* Data Sources: Prior meeting notes, CRM follow-ups, deal tracking, analyst revisions.
* Content:
  + Unfinished action items from last meeting.
  + Updates on previously discussed opportunities.
  + New recommendations based on changes since last call.
* Presentation: “Follow-Up & Opportunities” card with: Recap → Progress → Next Steps.

## 3. Key Financial Metrics

First-Time Client

* Data Sources: Public filings, financial terminals (Bloomberg, FactSet, CapIQ), internal research.
* Content:
  + 3-year history of Revenue, EBITDA, Net Income, Cash Flow.
  + Valuation ratios (P/E, EV/EBITDA) vs. peers.
  + Leverage (Debt/Equity, Debt/EBITDA) and liquidity.
  + Market performance (stock trends, 52-week high/low, market cap).
* Presentation: “Financial Snapshot” card with peer benchmark comparisons.

Returning Client

* Data Sources: Same as above, date-filtered since last meeting.
* Content:
  + Quarter-over-quarter financial changes since last interaction.
  + Analyst estimate revisions.
  + Significant balance sheet or market cap changes.
* Presentation: “Updated Financials Since Last Meeting” card with delta indicators (↑/↓).

✅ Engineering Notes

* Implement two interaction modes: First-Time and Returning.
* Anchor “Returning Client” flows to last meeting date via Outlook/CRM integration.
* Present insights in modular cards (Digest, Talking Points, Financials).
* Ensure updates are raw facts and talking points are synthesized actions — this separation must be preserved in design and data processing.

Would you like me to also turn this into a tabular version (rows = sections, columns = first-time vs returning) so engineers can instantly see scope differences?

##### You said:

**Uploaded image**

Okay, so this is how I'm putting my business requirement together. I'm showing a wireframe and then I'm talking about what should be included in that. So given this, could you do this? And looking at my data sources as well, could you see if any of these data sources are representative in the data sources that you are saying? And yeah.

###### ChatGPT said:

Thanks for sharing the screenshot — this makes it much clearer how you’re structuring the business requirements with wireframes + data sources + logic. Let’s align your setup with what I outlined earlier.

## ✅ Your Data Sources in the Screenshot

* CapIQ (most important)
* Crunchbase
* Deal Logic
* Call Notes
* Public Websites
* Broker Reports

## 🔄 Mapping to My Suggested Sources

Here’s how your current list maps to what I proposed:

* CapIQ → ✔︎ Matches my *financial terminals (Bloomberg, FactSet, CapIQ)*.
* Crunchbase → ✔︎ Matches my *company overview + competitor/market intel*.
* Deal Logic → ✔︎ Covers *internal deal activity logs / deal tracking*.
* Call Notes → ✔︎ Matches *internal CRM notes, memos, prior meeting insights*.
* Public Websites → ✔︎ Matches *company website, press releases, regulatory filings (EDGAR/SEDAR)*.
* Broker Reports → ✔︎ Matches *analyst reports, equity research, market commentary*.

What’s missing compared to my earlier requirements:

* CRM systems (Salesforce, DealCloud): for pipeline, prior interactions, ownership history.
* Regulatory filings (EDGAR, SEDAR) explicitly — though some of this might be bundled into CapIQ/public websites.
* News feeds (Bloomberg, Reuters, FactSet news) — you may already capture this partially via CapIQ/Broker Reports, but worth checking if you want a dedicated news integration.
* Internal strategy docs / proprietary notes — optional, but useful for richer *Talking Points*.

## 🧩 Business Requirement Format Aligned to Your Style

Following your screenshot style (UI/UX, Data Sources, Logic):

### 02.03.02 Client Insights: Recent Updates

* UI/UX:
  + Show *Recent Updates* card with chronological digest.
  + Highlight new since last meeting (for returning clients).
* Data Sources:
  + CapIQ (financial + filings)
  + Crunchbase (company profile, funding, competitors)
  + Deal Logic (deal activity)
  + Call Notes (internal CRM/meeting notes)
  + Public Websites (press releases, regulatory filings)
  + Broker Reports (analyst research, market context)
* Logic:
  + First Client Meeting: Surface all key content from past 6–12 months.
  + Follow-Up Client Meeting: Surface only content since last recorded meeting.

### 02.03.03 Client Insights: Talking Points

* UI/UX:
  + Display *Talking Points* card with three sections:
    - Relationship/Icebreakers (bios, shared history).
    - Strategic Fit (objectives, challenges).
    - Opportunities/Recommendations (derived from updates).
* Data Sources:
  + CapIQ (financial context)
  + Crunchbase (strategic initiatives, competitors)
  + Broker Reports (analyst insights, industry context)
  + Call Notes (prior client goals, open questions)
  + Internal Strategy Docs (optional, if available)
* Logic:
  + First Client Meeting: Generate talking points from company profile, strategy, peer comparisons.
  + Follow-Up Client Meeting: Generate talking points tied to open items + new updates since last meeting.

### 02.03.04 Client Insights: Key Metrics

* UI/UX:
  + Show *Key Metrics* card with peer benchmark comparisons and ↑/↓ delta highlights.
* Data Sources:
  + CapIQ (financials, valuation ratios, leverage, liquidity).
  + Broker Reports (earnings summaries, estimate revisions).
  + Public Websites (latest press releases/filings).
* Logic:
  + First Client Meeting: Show 3-year financial history, valuation ratios, leverage/liquidity metrics.
  + Follow-Up Client Meeting: Show quarter-over-quarter deltas since last meeting (earnings, estimates, balance sheet changes).

👉 So essentially: your listed data sources are already covering ~80% of what I outlined. The main things you might want to explicitly add are CRM integration (for internal history) and dedicated regulatory/news feeds for completeness.

Do you want me to redraw this into a requirements table (like the one in your screenshot, with UI/UX | Data Sources | Logic columns for each section) so you can paste it directly into your doc?

##### You said:

Yeah, I like this, but make it more extensive. So I think the first response that you gave me, you even divided the data sources by if it was the first-time client or if it was a returning client with which I've had like multiple meetings. And then I think you also had more details in the logic itself. So can you provide a more extensive logic for this?

###### ChatGPT said:

Perfect — let’s expand this into the more extensive, first-time vs. returning client format with detailed logic. This way your engineers get crystal-clear requirements per section, per client type. I’ll keep the UI/UX | Data Sources | Logic structure you like, but expand each part so it’s rich enough for hand-off.

# **Business Requirements — Client Meeting Prep**

## 02.03.02 Client Insights: Recent Updates (What Happened)

### UI/UX

* Present a “Recent Updates” card with a chronological feed.
* Clear visual cue for First-Time vs Returning (e.g., toggle or auto-detect based on CRM/Outlook history).
* Updates should be tagged with source type (news, CRM, filings, analyst note).
* Provide a highlight strip for “critical updates” (M&A, earnings, executive changes).

### First-Time Client

Data Sources

* External:
  + CapIQ: company profile, financial filings, market activity.
  + Crunchbase: company overview, funding rounds, competitive landscape.
  + Public Websites/Press Releases: corporate announcements, leadership changes.
  + Regulatory Filings: EDGAR/SEDAR for annual, quarterly, and event-driven filings.
  + Broker/Analyst Reports: market perception, analyst commentary.
  + Industry News Feeds (Bloomberg/FactSet/Reuters): broader sector context.
* Internal:
  + Call Notes (if available from colleagues).
  + Internal Memos/Strategy Notes.

Logic

* Retrieve 12 months of company updates with priority ordering:
  + Hard events (M&A, new product launches, CEO changes).
  + Financial disclosures (earnings releases, guidance changes).
  + Sector shifts (competitor launches, regulatory changes).
* Surface executive bios for meeting attendees.
* Enrich updates with context tags (e.g., “Competitor Activity,” “Regulation,” “Financial Disclosure”).
* Present as Company & Industry Digest.

### Returning Client

Data Sources

* External: Same as above.
* Internal:
  + CRM/Deal Logic/Call Notes → action items, deal status.
  + Prior meeting record (date anchor).

Logic

* Filter only updates since last recorded meeting date.
* Highlight changes across four categories:
  + Company announcements.
  + Competitor movements.
  + Analyst/broker revisions.
  + Internal CRM entries.
* Provide deltas vs last interaction (e.g., “Stock price ↑ 12% since May 10 meeting”).
* Present as “What’s Changed Since Last Meeting” card.

## 02.03.03 Client Insights: Talking Points (What to Say)

### UI/UX

* Talking Points card divided into:
  1. Icebreakers/Relationship.
  2. Strategic Fit.
  3. Opportunities & Recommendations.
* Each talking point linked to its supporting update (traceability).
* Allow banker to edit/curate before meeting.

### First-Time Client

Data Sources

* CapIQ: financial/valuation context.
* Crunchbase: funding, partnerships, competitive signals.
* Broker Reports: industry dynamics, peer performance.
* Internal Strategy Docs: thematic/sector insights.
* Public Data: LinkedIn/BoardEx for attendee bios.

Logic

* Generate introductory context (who they are, what they’ve been doing recently).
* Extract strategic objectives (growth, M&A, capital raising) from reports, press releases.
* Map peer moves (comparable deals, sector benchmarks) as talking points.
* Generate 2–3 advisor-style recommendations tailored to sector position.
* Create personalized icebreakers (congratulate on product launch, leadership recognition, etc).

### Returning Client

Data Sources

* CRM/Call Notes: previous action items, outstanding requests.
* CapIQ: updated metrics and filings.
* Broker Reports: estimate revisions, market commentary.
* Deal Logic: ongoing transactions.

Logic

* Start with Recap: last meeting’s commitments, unresolved items.
* Update opportunity areas discussed previously (progress, new data points).
* Suggest new recommendations aligned with what changed since last meeting.
* Cross-link to Recent Updates section for context (e.g., “Given their Q2 earnings surprise, reframe financing strategy”).
* Organize into Follow-Up & Opportunities card with Recap → Progress → New Directions.

## 02.03.04 Client Insights: Key Metrics

### UI/UX

* Key Metrics card with compact table and peer benchmarks.
* Use delta indicators (↑/↓) for returning clients.
* Support export to banker’s notes or pitchbook.

### First-Time Client

Data Sources

* CapIQ: historical financials, valuation, balance sheet.
* Broker Reports: summary earnings, consensus estimates.
* Public Filings (EDGAR/SEDAR): raw quarterly/annual data.

Logic

* Show 3-year historical data: Revenue, EBITDA, Net Income, Cash Flow.
* Display valuation multiples: EV/EBITDA, P/E, P/B vs peers.
* Add leverage and liquidity ratios (Debt/Equity, Debt/EBITDA, current ratio).
* Show stock performance: market cap, 52-week high/low, YTD change.
* Benchmark all against industry averages.

### Returning Client

Data Sources

* CapIQ: new filings, updated estimates.
* Broker Reports: analyst estimate revisions.
* Internal Notes: deal-related valuation assumptions.

Logic

* Anchor to last meeting date.
* Show only deltas:
  + Q/Q financial results vs prior quarter.
  + Analyst estimate changes since last call.
  + Market sentiment (ratings upgrades/downgrades, price target changes).
  + Balance sheet changes (new debt issuance, refinancing).
* Summarize with highlighted shifts (e.g., “Net Debt ↓ $500M since April meeting”).

✅ Engineering Notes

* Each section requires two logic flows (first-time vs returning).
* Build date anchor logic using CRM/Outlook integration for returning client mode.
* Maintain strict separation between:
  + Recent Updates = Raw facts.
  + Talking Points = Curated insights derived from those facts.
* Output must be card-based, modular, and traceable (banker can click into sources).

Would you like me to now render all three sections in a tabular format (columns = first-time vs returning, rows = data sources + logic) so your engineers can consume it directly in Jira/Confluence?

ChatGPT can make mistakes. Check important info. See .