## Dependencies

* Client IQ insights store with sectioned content + metadata (source, timestamp, author/LLM).
* Output services: **Client Briefs** and **Script Assistant** with template libraries.
* Export services (Send as Email, Open in Word).
* Permissions/sharing via RBC directory (Owner/Editor/Viewer) and audit logging.
* Data integrations (e.g., Bloomberg, FactSet, PitchBook) for citations/provenance.
* Versioning for outputs and sections.

## Acceptance Criteria

### 1) Insight Selection (Client IQ)

* User can multi-select cards/paragraphs from sections (Recent Updates, Talking Points, Key Metrics, etc.).
* Each selection shows provenance (source link + last refreshed time).
* **Save to →** user chooses **Client Brief** or **Meeting Script**; select existing item or **Create new**; pick a template.

### 2) Save → Client Brief (Target: Briefs)

* Selected insights map to the correct brief sections (Business Overview, Recent Developments, Strategic Initiatives, Key Metrics, charts).
* Charts/metrics render with formatting; show **Last updated** and **Data Refresh** status.
* De-dup prompt: **Replace / Keep both / Skip** when similar content exists.
* After save, user can edit inline and see citations with “View Source.”
* Brief supports **Send as Email** and **Open in Word** preserving layout and citations.
* Management actions on the brief or its sections: **Duplicate, Save as Template, Favorite, Archive, Delete** (with confirmation).

### 3) Save → Meeting Script (Target: Script Assistant)

* Selected insights map to script blocks (e.g., Openers, Business Overview, Recent Developments, Initiatives).
* Blocks support speaker/persona tags and drag-to-reorder.
* Management actions available via context menu: **Duplicate, Save as Template, Open in Word, Favorite, Archive, Delete**.
* Export of the full script or selected blocks to Word; **Send as Email** option available.

### 4) Common Behavior (Briefs & Scripts)

* **Permissions:** Only Editors can modify/duplicate/archive/delete; Viewers are read-only; access honors meeting sharing settings.
* **Traceability:** Saved blocks retain citations and link back to Client IQ or external sources.
* **Updates:** If a source changes, show **Refresh** indicator and offer **Update / Compare / Dismiss**.
* **Persistence:** Templates and favorites persist across sessions; users can apply templates on create.
* **Telemetry:** Capture selection rate, save success, refresh events, export usage.

### 5) Performance & Reliability

* Select→Save completes ≤2s for text and ≤4s for charted sections.
* Export to Word/Email completes ≤5s with brand-correct formatting.
* All actions are auditable (who/what/when; before/after versions).

## Business Requirements

* Works in Outlook desktop and web add-in.
* Consistent RBC branding (fonts, headings, spacing, logos) across outputs and exports.
* Admin-curated template libraries; users can save personal templates.
* Keyboard shortcuts for select/save; accessible for screen readers.
* Offline-tolerant draft state (auto-save and resume when reconnected).

## Definition of Done

* E2E tests pass: **Select in Client IQ → Save to Brief** (edit, dedupe, refresh, export) **and** **Save to Script** (reorder, template, export).
* Permissions validated across Owner/Editor/Viewer; sharing reflects meeting access.
* Version history and audit logs present for saves, refreshes, archives, deletes.
* Formatting/citations remain intact in Email and Word exports.
* Bankers validate usability in pilot; performance meets SLAs.