## Business Requirements

**Objective** Enable bankers to see *AI-suggested follow-up prompts* in each section of the Meeting Highlights view (Recent Updates, Talking Points, Key Metrics, Attendee Overview) that anticipate their next question or action, improving meeting preparation and in-meeting responsiveness.

**Scope**

* Applies to all Meeting Highlights sections in the Client IQ workspace (Recent Updates, Talking Points, Key Metrics, Attendee Overview).
* Suggestions should be contextually relevant to the content of the section and the specific client/meeting.
* Prompts must be actionable and phrased to drive banker next steps (e.g., deeper analysis, new questions, cross-referencing with past data).

**Functional Requirements**

1. **AI Prompt Generation**
   * For each section, the system should automatically generate 2–3 suggested follow-up prompts.
   * Prompts must be contextually relevant based on:  
     + Data in that section
     + Historical meeting content with the client
     + Broader market or financial context relevant to the client
2. **Prompt Placement**
   * Prompts appear at the bottom of each section in a consistent UI format (e.g., clickable button or expandable chips).
3. **Prompt Actions**
   * Clicking a prompt should:  
     + Trigger the AI to retrieve or generate the requested information.
     + Present the results in-line or in an overlay without leaving the Meeting Highlights page.
4. **User Interaction**
   * Bankers can edit a suggested prompt before executing it.
   * Bankers can dismiss irrelevant prompts.
5. **Performance**
   * Prompts should load in under 2 seconds after section content is visible.

## Dependencies

* **Data Sources**:  
  + Access to underlying meeting notes, past meeting summaries, market data feeds, analyst research, and client profiles.
* **AI Model Contextualization**:  
  + LLM must have access to historical meeting data for that client.
  + Model must be fine-tuned or configured with prompt templates for banker workflows.
* **UI Development**:  
  + Front-end components for prompt display, selection, and execution.
* **Backend Services**:  
  + API to request prompts from AI service per section.
  + API to execute selected prompts and return results.
* **Security & Compliance**:  
  + Ensure no MNPI (Material Non-Public Information) is inadvertently surfaced.
  + Adhere to RBC data handling policies.
* **Testing & QA**:  
  + Scenario coverage for different client types, meeting types, and data completeness.

## Acceptance Criteria

1. **Prompt Relevance**
   * At least 80% of AI-suggested prompts are rated “relevant” or “very relevant” by bankers in pilot testing.
2. **Coverage**
   * Every Meeting Highlights section generates at least 2 suggested prompts when sufficient data exists.
3. **Performance**
   * Prompts render within 2 seconds after the section loads.
4. **Actionability**
   * Clicking a prompt returns an AI-generated answer or analysis in under 5 seconds.
5. **User Control**
   * Users can edit or dismiss prompts without affecting other sections.
6. **Data Safety**
   * No confidential or non-compliant data is surfaced in AI suggestions.
7. **Context Awareness**
   * Prompts are clearly tied to section data (e.g., a metric in Key Metrics or a name in Attendee Overview).
8. **UI Consistency**
   * All prompts follow the same design style and placement across sections.

## Definition of Done

* Backend AI service integrated and tested with real RBC banker workflows.
* Prompt generation tested on multiple meeting types and client profiles.
* All acceptance criteria met in QA and UAT.
* Compliance and security review passed.
* Documentation updated for both end users and support teams.
* Feature flag available for controlled rollout to pilot group (e.g., Canadian Bankers).
* Analytics tracking enabled to measure prompt usage and relevance feedback.