**Dependencies**

* Outlook calendar integration to surface past meetings in AidenBanker
* NoteTaker application integration for deep-link access to full meeting notes
* Client IQ module to display detailed meeting breakdown and AI-generated follow-ups
* Email drafting service integrated with Outlook and RBC security policies
* User permissions model for accessing client meeting data and sending communications

**Acceptance Criteria**

1. **Trigger Behavior** – Opening a past meeting invite in Outlook launches the AidenBanker meeting summary pane with links to NoteTaker
2. **Navigation** – Clicking “Client IQ” expands to show detailed meeting sections, including action items and AI-generated follow-ups
3. **Email Draft Generation** – Selecting “Draft follow-up email” creates a structured message with greeting, recap, action items, and closing
4. **Edit & Send Options** – Ability to edit the draft in-app, send to Outlook inbox, or route to internal review
5. **Formatting & Branding** – Email uses RBC-approved structure, style, and tone

**Business Requirements**

* Flow must work in both Outlook desktop and web add-in
* All generated text must be editable before sending
* Links to NoteTaker and Client IQ must open in a new secure window or tab
* Support for multiple recipients (internal and external)
* Latency for loading summaries and generating emails must meet SLA

**Definition of Done**

* End-to-end workflow tested: Outlook → Summary view → Client IQ → Email draft → Send/export
* Meets accuracy and formatting requirements for generated summaries and emails
* Passes QA for security, permissions, and brand compliance
* No broken links between meeting summary, NoteTaker, and Client IQ