



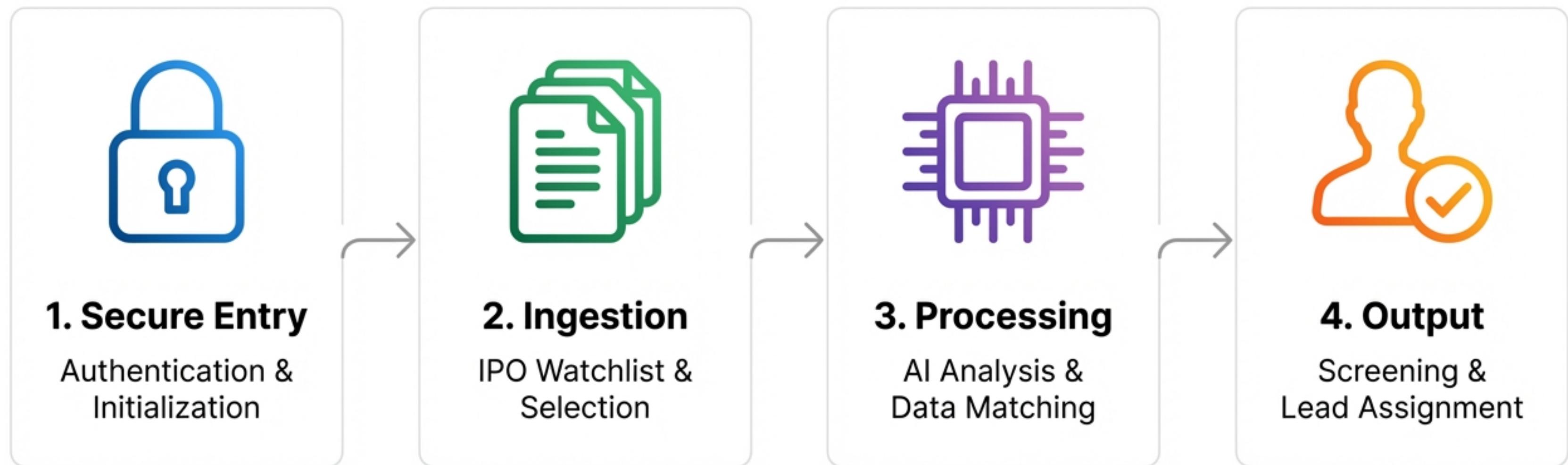
IPO Lead Generation & Screening Tool

Automated Identification, Qualification,
and Assignment Workflow

A functional walkthrough of the end-to-end application logic, from secure ingestion of IPO filings to the algorithmic identification of New-to-Bank (NTB) opportunities.

The Intelligent Workflow Architecture

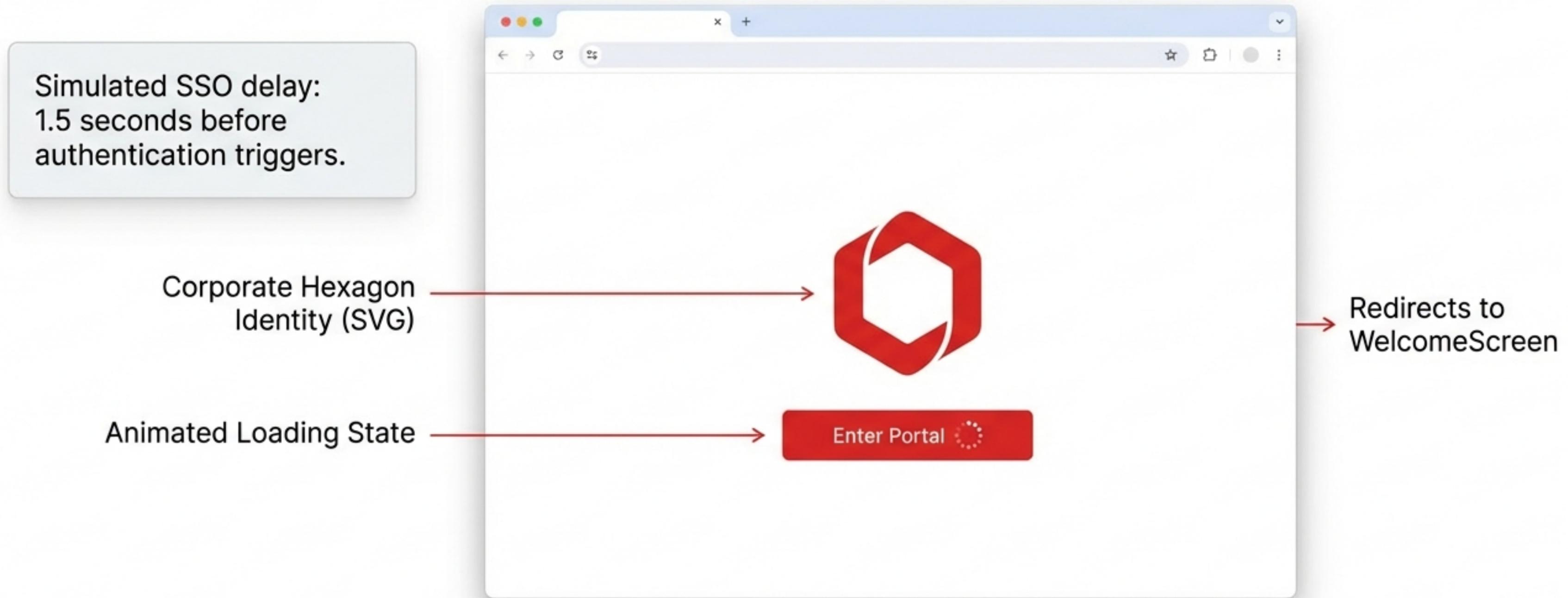
End-to-End System Logic



Target User: Investment Product Owners & Business Analysts

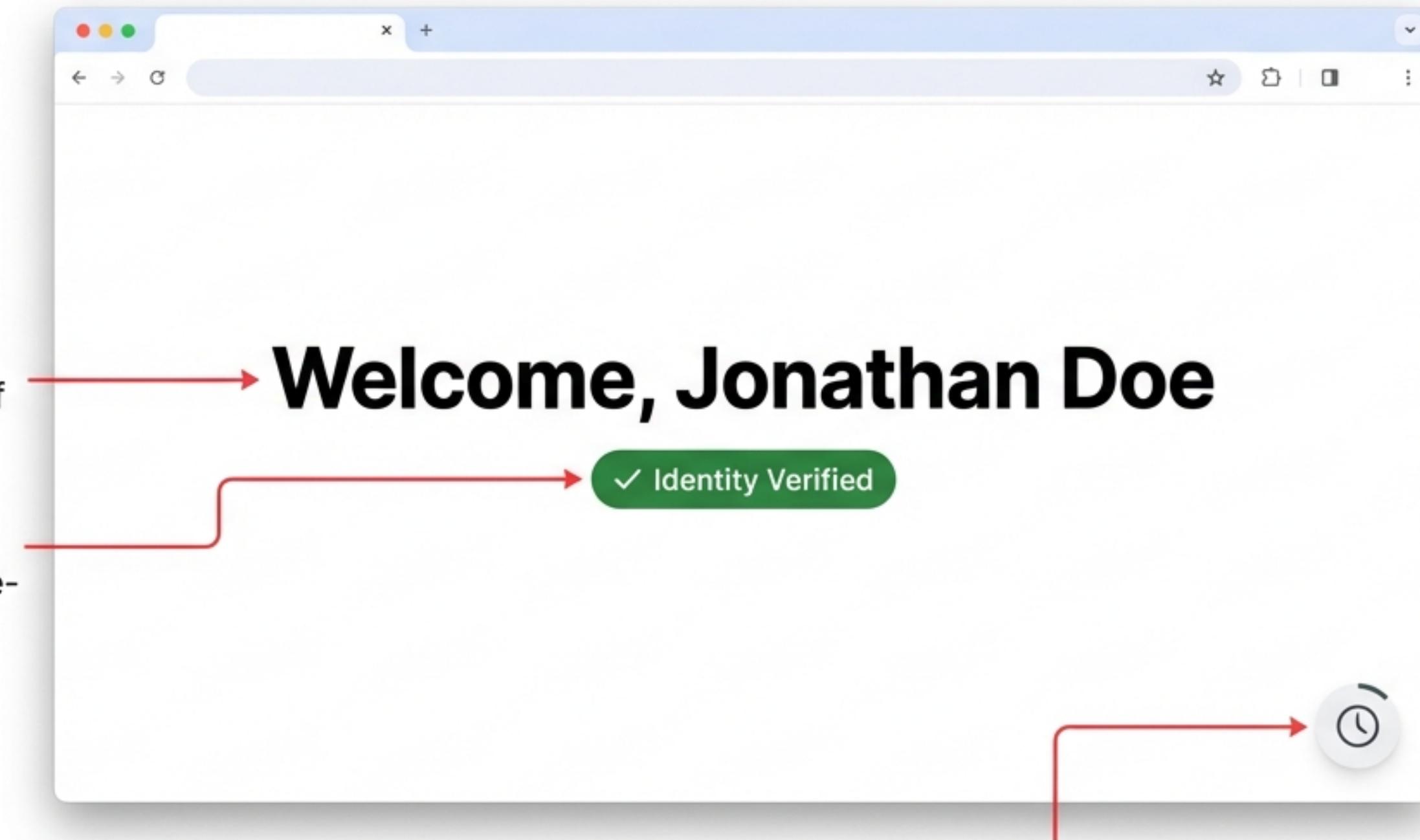
Phase 1: Secure Entry & Branding

Component: LandingPage.tsx



System Initialization & Personalization

Component: WelcomeScreen.tsx



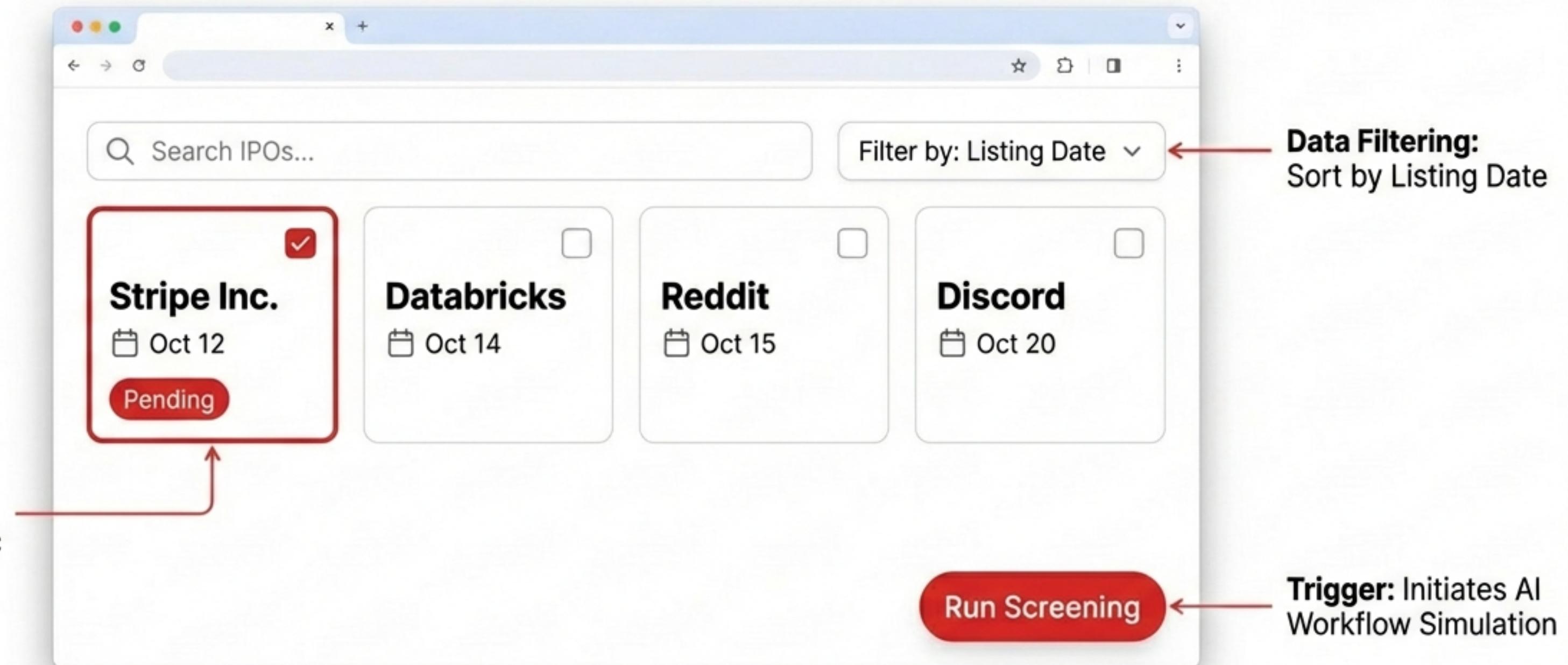
Verification Badge:
Visual confirmation of
SSO success.

Motion: Staggered
CSS animations (slide-
up 0.4s ease-out).

Auto-advance Logic: System holds for exactly 2.5
seconds before transitioning to IPO Watchlist.

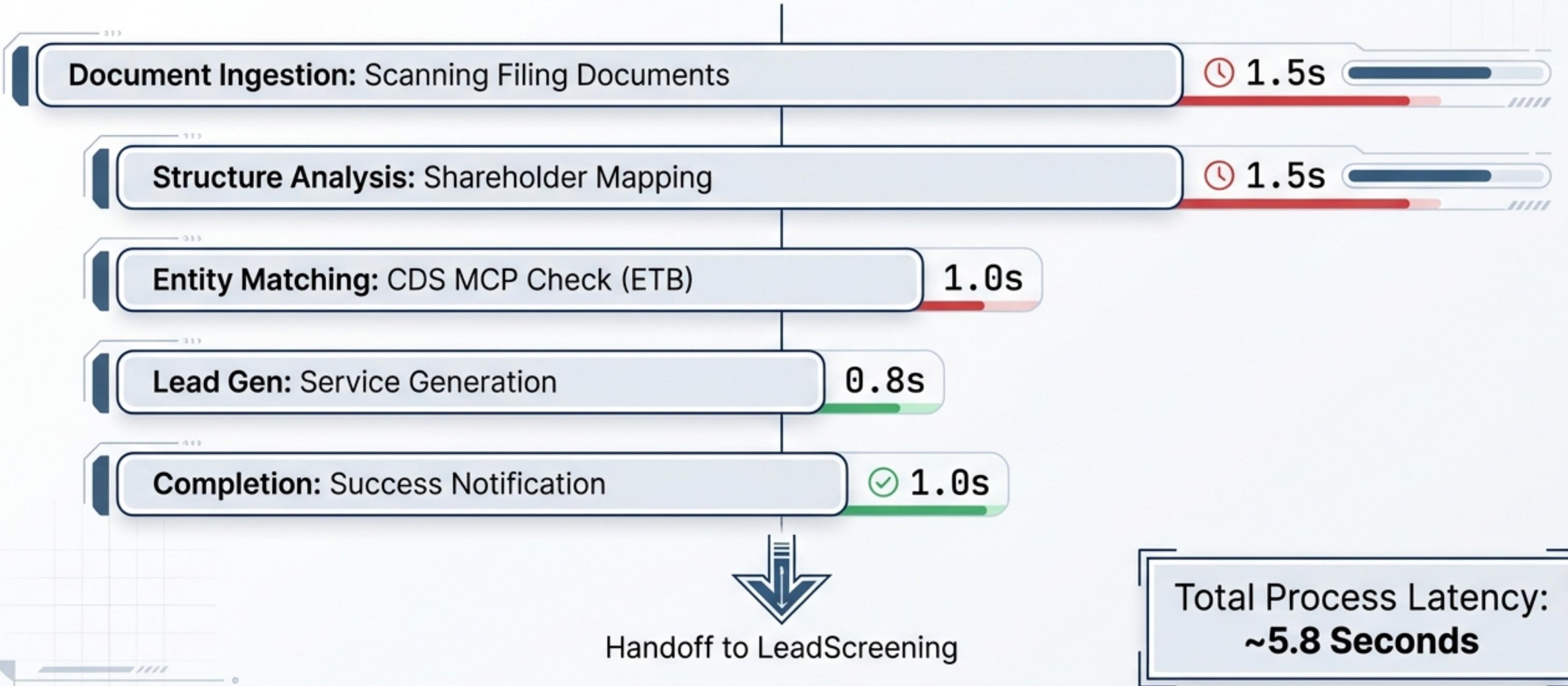
Phase 2: The IPO Watchlist & Selection

Component: IPOList.tsx



The AI Processing Simulation

Backend Simulation Logic & Latency

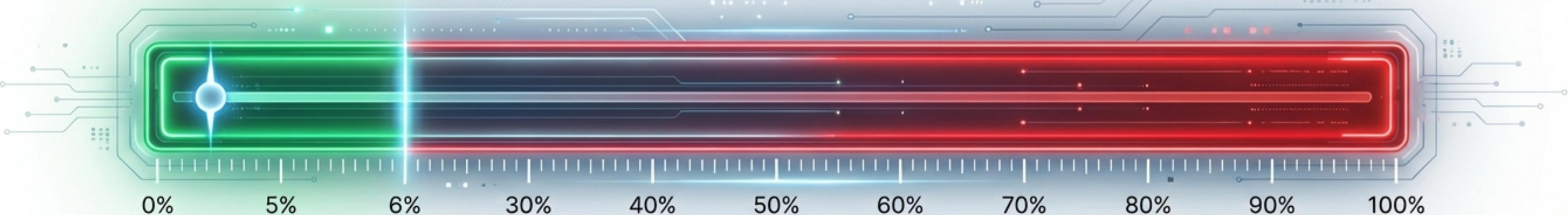


Logic Core: Interpreting the Match Score

The Match Score represents the AI's confidence that a prospect already exists in the bank's database. Lower scores indicate cleaner leads.

Zone A: Clean Lead

High Opportunity.
NTB (New-to-Bank).



Zone B: Potential Conflict

High Probability of Existing Relationship (ETB).

Rules of Actionability (NTB vs. ETB)

Decision Matrix

 ACTIONABLE (New-to-Bank)	 NON-ACTIONABLE (Conflict)
 Match Score: <= 5% (Low Confidence of Match)	 Match Score: > 5% (High Confidence of Match)
Client Key: Undefined / Null	Client Key: Exists (e.g., C-129384)
Status: Opportunity / Assignable	Status: Locked / Restricted

Phase 3: The Screening Interface

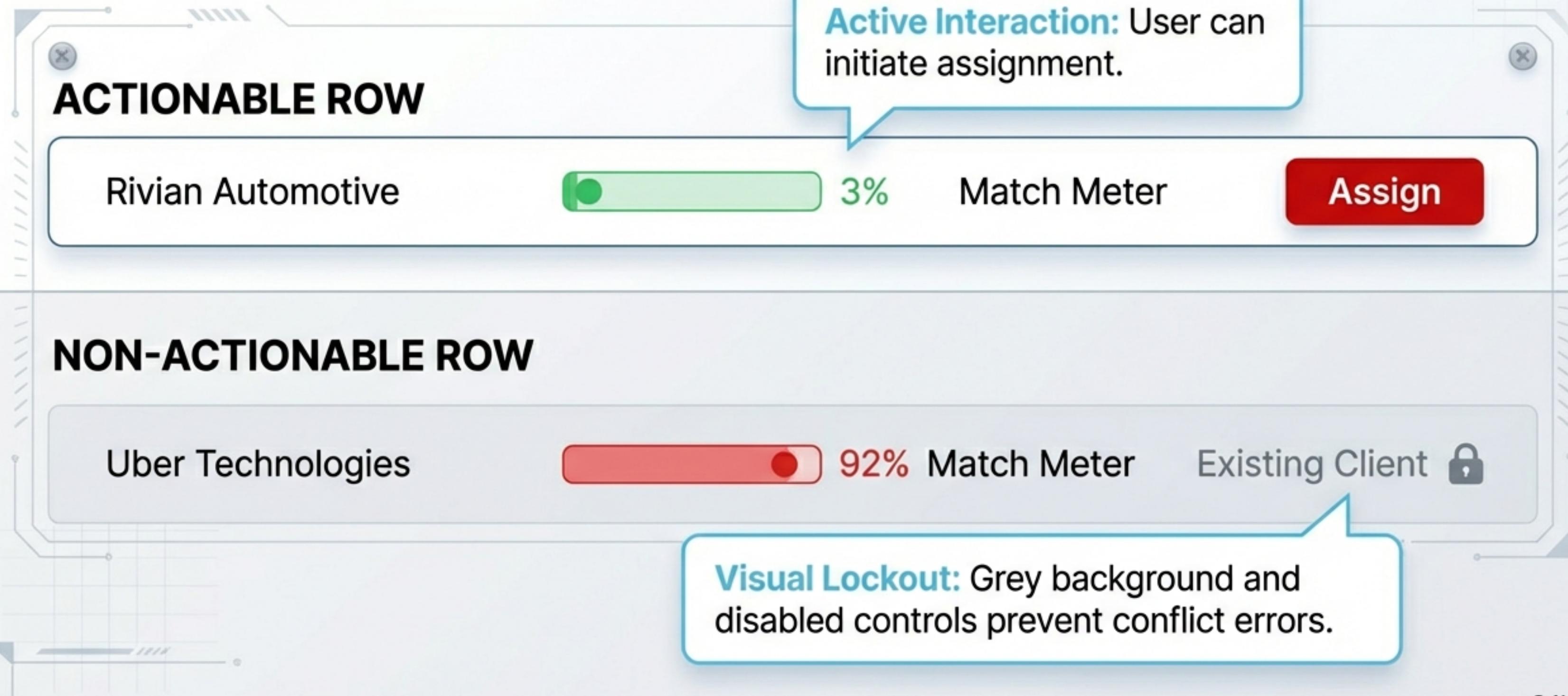
Component: LeadScreening.tsx

Default Sort: Ascending. The “cleanest” leads automatically appear at the top.

Name	Match Score	Client Key	Status	Action
Airbnb Inc.	● 2%	--	New Opportunity	Assign
Stripe Inc.	● 4%	--	New Opportunity	Assign
SpaceX	● 88%	CK-99201	Existing Client	Locked

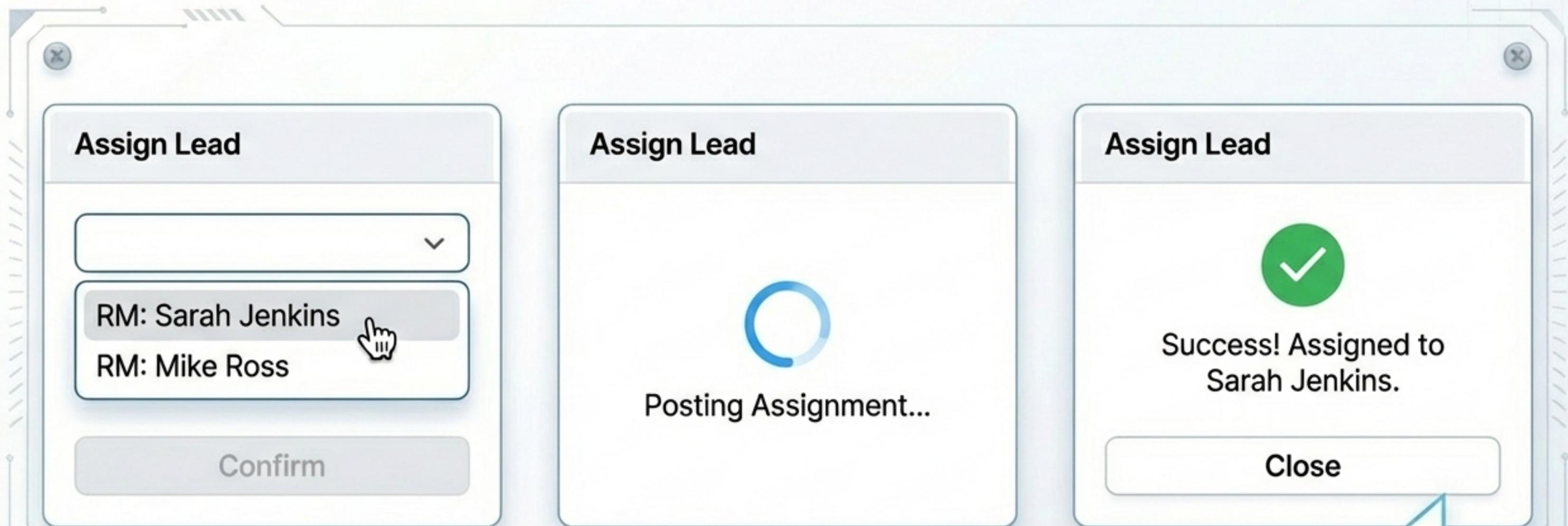
Visual Differentiation & Feedback

UI State Comparison



Phase 4: Lead Assignment Workflow

Modal Interaction Steps



State Update: Upon closure, the background row updates status to "Assigned".

Integration & Business Value

Downstream Impact



Screening Tool



JSON Data Push



PB MSD - RM Workbench

- **The Handoff:** Once assigned, data is securely pushed to the Private Bank (PB) MSD environment.
- **The Action:** Relationship Managers receive the clean lead in their workbench for immediate follow-up.
- **Value Prop:** Eliminates manual conflict checking, allowing RMs to focus purely on conversion.

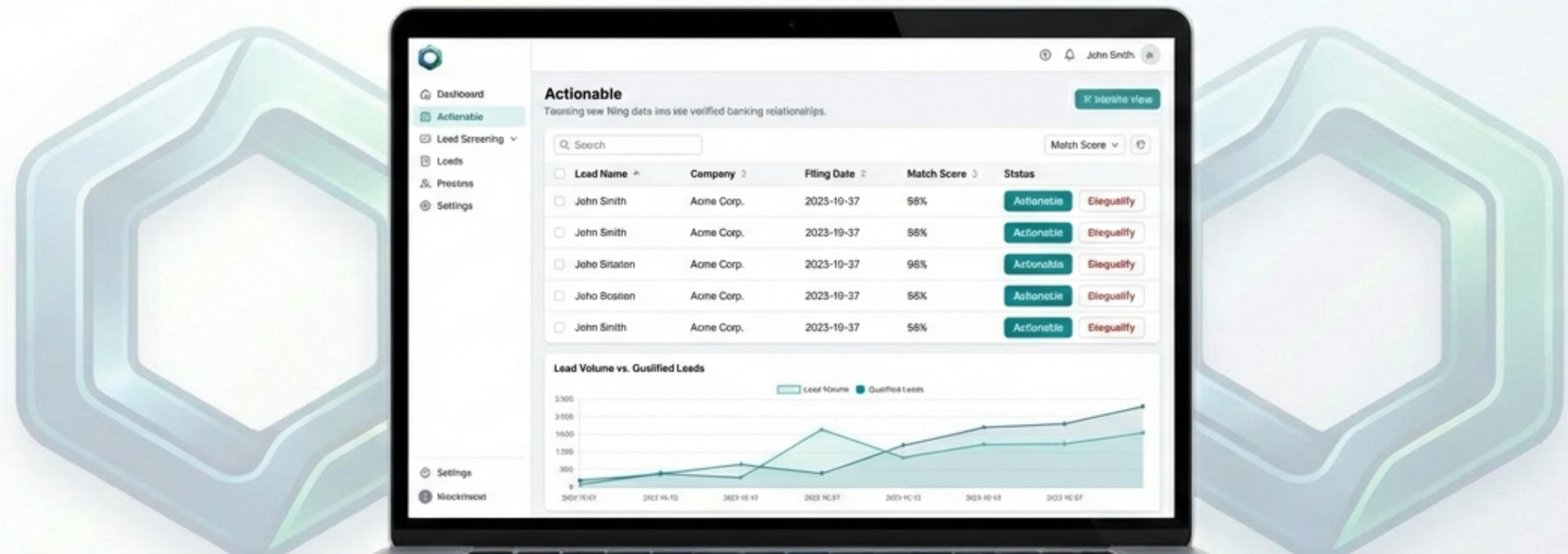
Technical Specifications Recap

Development Constraints & Constants

Component/Variable	Specification
LandingPage.tsx	Simulated SSO Delay: 1.5s
WelcomeScreen.tsx	Auto-advance Timer: 2.5s
IPOList.tsx	Interaction: Multi-select enabled
Process Simulation	Total Latency: ~ 5.8s (Sum of step functions)
LeadScreening.tsx	Default Sort: Ascending by Match Score
Business Logic	Threshold: > 5% = Conflict

Intelligent Lead Qualification

Turning raw filing data into verified banking relationships.



End of Functional Walkthrough