Daily Briefing edge cases logic and instructions - May 31, 2023

First draft wireframe. Reviewed with Louise, Danny and Denis on May 31. Approved to move to DEV on June 1.

1. What to do if there's more than 1 company in the meeting, what company do we profile?

- Keeping in mind that M360 + Copilot Teams app, is targeted towards Procurement personnel, Sales Reps, and Credit Professionals. They regularly meet with a lot of potential counterparties. But they do not often meet with several potential counterparties in a single meeting. So more than 1 counterparty in a single meeting would be an edge-case.

- That said, there are few ways to address this situation, should it arise:

  a) Use the domain of the meeting organizer (other than our user, of course).

  b) Use the domain of the counterparty that is most represented in the particular meeting. Example: I am Yelena Dobric, I am meeting with HumanFirst, and in this meeting, there's me and 4 representatives from HumanFirst. So we'll profile HumanFirst.

2. What if there are no prompts from the Copilot?

Yelena added to Jira #11, on June 20: https://moodysanalytics.atlassian.net/browse/OR-11

- Please note that Prompts are the row underneath M360, ESG and Copilot News cards.

- If there are no prompts, the "Copilot Insights" row should not show.

- In the Adaptive Card, in the Use Case #1, when there are no prompts, we show "Meet the Copilot" button, that takes users to a Copilot page on Moodys.com (that does not exist yet but it will). Please note that this approach does NOT really work with the Daily Briefing, because we take up a whole row, a lot of real estate, to show 1 button.

3. What is there are no Copilot news about the profiled company?

- Yelena added to Jira #81, on June 20: https://moodysanalytics.atlassian.net/browse/OR-81

- We are talking about the "Copilot News" card. This card should return a summary of news about the profiled company.

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- If there are no news about the company, we do have information from M360, of what industry the company belongs to. “Industry” is displayed in the additional information from M360. So we return news from that industry. In this wireframe, we show that. With the 3rd company, Aligne Tech, there were no news. And Aligne Tech is in IT Consulting industry. So the news portrayed, is trends from the IT Consulting in general.

4. Why is there so much empty space in the Meeting Information card?

- Because we leave space for long meeting names. See example #2, Gramener. 10am appointment.

5. What if there is someone with a Gmail email in the meeting?

Yelena added to Jira #81, on June 20: https://moodysanalytics.atlassian.net/browse/OR-88

- Instructions for DEV: please program the Daily Briefing, to ignore the following domains: Gmail, Yahoo, Hotmail, Earthlink.net, AOL, iCloud, GMX, Outlook, Mail.com, Email.com, USA.com, Post.com, Comcast.net, Verizon.net and ATT.net. Other types of common domains are .org (non-profits), .gov (government), and .edu (educational institutions).

6. **What if there are no meetings with external companies detected in the user’s calendar?**

Add a message that says “You don’t have any meetings including external companies. When you do, we will show relevant details here.”

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