

Financial Meeting Prep

Create pre-meeting insights in seconds



Financial Meeting Prep is a Microsoft product and Microsoft Teams application that features market-leading data, news and analytics from LSEG Workspace.

Financial services professionals with an LSEG Workspace license and Microsoft Teams license with Copilot can use Financial Meeting Prep to prepare for client meetings quickly, easily and conveniently.

Financial Meeting Prep enables users to streamline client communications, improve engagement and save time by creating customised reports, using LSEG's trusted data sources and AI-generated email drafts. It applies LSEG's data, news and analytics to identify insights, reduce manual and labour-intensive processes and help drive value for clients.

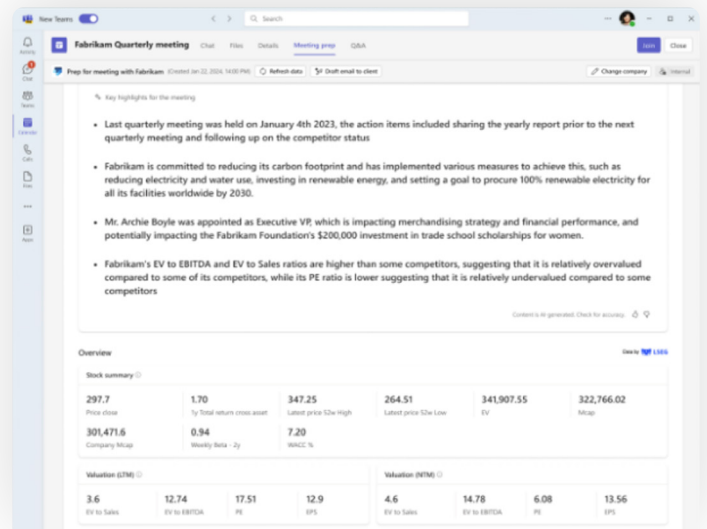
Financial Meeting Prep allows users to provide more accurate client advice and make better-informed decisions with the latest financial and market data from LSEG Workspace — consolidated in a single, easily refreshable report.

LSEG's integration with Microsoft's Financial Meeting Prep offers deep links and interoperability with LSEG Workspace to augment the workflow experience.

Turn days of work into seconds

Preparing for client meetings is typically a time-consuming and complex task. Financial services professionals need to sift through overwhelming volumes of data contained in multiple formats in many locations, such as emails, presentations and customer relationship management (CRM) systems. It can take days to pull together all the information needed for a successful client meeting.

Financial Meeting Prep uses generative AI and consolidates public company data from Microsoft 365 and LSEG Workspace to automatically generate key highlights in the reports and draft emails based on the content of the report. Reports can be accessed by internal team members and refreshed by LSEG Workspace license holders, saving hours of preparation, ensuring the latest content and guaranteeing alignment before a client meeting.



LSEG



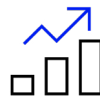
Microsoft

Driving value and insight

Financial Meeting Prep simplifies the process of preparing for a client meeting while providing insights that can be used to drive value for clients – empowering financial professionals to improve collaboration, boost productivity and achieve more.



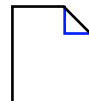
Navigate to a meeting invite in Teams and click the Financial Meeting Prep button to generate a single view of the client's key financial news and data from LSEG Workspace.



Microsoft Graph automatically generates action items from meetings, with insights supplemented by prior work and related files, all neatly consolidated in a single location.



Discover trending topics about your client's organisation, with the most relevant news and information drawn from thousands of LSEG sources.



Financial Meeting Prep reports can be dynamically updated by LSEG Workspace license holders to ensure they always feature the most relevant news and insight. In addition, the application can generate automated draft emails to save time.

Who would find Financial Meeting Prep useful?

- A senior banker preparing for a meeting after an event such as an acquisition or facing a last-minute request for insights on a different company
- Associates, analysts and VPs that support meeting preparations

Essential requirements to access Financial Meeting Prep:

- An LSEG Workspace license
- A Microsoft Teams license with Copilot

Discover more about how Financial Meeting Prep and LSEG Workspace can transform your business:

lseg.com/microsoft-partnership

About LSEG

LSEG (London Stock Exchange Group) is more than a diversified global financial markets infrastructure and data business. We are dedicated, open-access partners with a commitment to excellence in delivering the services our customers expect from us. With extensive experience, deep knowledge and worldwide presence across financial markets, we enable businesses and economies around the world to fund innovation, manage risk and create jobs. It's how we've contributed to supporting the financial stability and growth of communities and economies globally for more than 300 years.

Discover more at lseg.com



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