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|  | **AI Advancements** |

Knowledge Hub Chatbot

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| **PROJECT TITLE** | Knowledge Hub Chatbot |
| **COMPANY NAME** | Capital Legal |
| **CLIENT** | Barry Pound |
| **PROJECT MANAGER** | Sean Oldenburger |
| **AUTHOR** | Samuel Cunningham |
| **START DATE** | Not specified |
| **END DATE** | Not specified |
| **PROJECT DESCRIPTION** | Creating an AI chatbot to assist real estate agents in drafting contracts and answering related queries. |

Client Approval and Sign-Off

Name:

Date:

Signature:

Contractor Approval and Sign-Off

Name:

Date:

Signature:

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Change Logs

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| --- | --- | --- | --- |
| **Revision** | **Change Description** | **Approval Date** | **Author** |
| 1.0 | Initial Draft | 03/09/2025 | Samuel Cunningham |
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1.0 Scope

This will be a beta project of the Knowledge Hub chatbot. The chatbot will be available through a standalone website, developed and hosted by AI Advancements. The chatbot will be able to answer questions and retrieve specific information when asked by the user. The chatbot should always reference the document from which the answer was found. The beta will NOT include authentication or analytics.

2.0 Contract Structure

Not specified

3.0 Key Deliverables

* A standalone website for the Knowledge Hub Chatbot accessible to real estate agents.
* An AI chatbot capable of answering user queries and retrieving information from a knowledge base of legal/conveyance documents.
* Implementation of a disclaimer that informs users that all responses are AI-generated.
* A user-friendly interface that includes example questions to guide users on how to interact with the chatbot.
* Integration of a two-factor authentication process for user logins to enhance security.

4.0 Plan

Frontend:

* Develop a standalone website for the Knowledge Hub Chatbot.
* Create a user-friendly interface for real estate agents to log in and interact with the chatbot.
* Implement a disclaimer that informs users that all responses are AI-generated.
* Include example questions on the main page to guide users on how to interact with the chatbot.
* Ensure users can copy AI responses with a single click.

Backend:

* Host the chatbot on Microsoft Azure, ensuring secure and reliable performance.
* Implement AI logic to enable the chatbot to answer user queries based on a knowledge base of legal/conveyance documents.
* Use Retrieval-Augmented Generation (RAG) techniques to improve document search capabilities.
* Ensure the chatbot can reference the documents used for generating responses.

AI Integration:

* Integrate a large language model to power the chatbot's responses.
* Allow the AI to provide detailed responses, even if the information is not explicitly found in the documents.
* Include instructions at the end of each message to guide users on how to use the chatbot effectively.

User Authentication:

* Implement a two-factor authentication process for user logins to enhance security.
* Collect user information during the sign-up process, including name, email, company name, phone number, and purpose of use.

Document Management:

* Establish a process for updating documents over time, ensuring users are informed about how to remove outdated files.
* Initially, the beta version will not include the ability to remove files, focusing on a slimmed-down project scope.

Testing and Feedback:

* Conduct a beta test with 5 real estate agents and 2 conveyancers to gather feedback on usability and functionality.
* Ensure users sign a disclaimer before accessing the chatbot and at the end of their session.

Future Development:

* Plan for future enhancements, including user analytics, the ability for approved users to add/remove files, and integration with Capital Legal servers.
* Consider expanding the chatbot's capabilities to serve all branches of LJ Hooker Settlements in the future.

5.0 Assumptions

* Capital Legal will provide all necessary legal documents for the chatbot's knowledge base.
* Real estate agents and conveyancers will actively participate in the beta testing phase.
* The client will ensure that all users have access to the internet and necessary devices to use the chatbot.
* AI Advancements will have access to Microsoft Azure for hosting the chatbot.
* The client will provide feedback and support during the development and testing phases.
* The project timeline will not be significantly delayed by external factors outside of AI Advancements' control.

6.0 Timeline

|  |  |  |
| --- | --- | --- |
| **Milestone** | **Description** | **Estimated Time (Days)** |
| 1 | Creation of knowledge base | 1 |
| 2 | AI logic (server development and hosting) | 3 |
| 3 | Website development and hosting | 1 |

Total Duration: 5

7.0 Budget

|  |  |  |  |
| --- | --- | --- | --- |
| **Category** | **Time (Days)** | **Day Rate** | **Cost ($)** |
| Developer Effort | 5 | 1600 | 8000 |
|  |  | Total Cost | 8000 |
|  |  | + 10% GST | 8800.0 |

8.0 Delivery Team

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|  | Sam is an experienced AI Engineer and the Director of AI Advancements. He has led numerous AI projects including chatbots, document processing systems, and automated reporting tools. Sam specializes in large language models and conversational AI. |

Samuel Cunningham

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|  | Sean is an AI Engineer with expertise in machine learning and data science. He has developed multiple AI solutions including ECG analysis systems and automated document generation tools. |

Sean Oldenburger

9.0 Past Projects

* Conveyancing Chatbot
* We built a chatbot for Capital Legal to help their employees and clients easily find answers to common questions based on a knowledge base of pdfs, word documents, websites etc. Each response ends with a call to action, redirecting users to the appropriate employee in Capital Legal.
* AI Educational Tutors
* We built personalised AI tutors for all online training courses on the Coursebox AI platform. This included a feature which automatically generates AI instructional videos for all course pages with human avatars and chatbots on each page which understand the course content and assist the learner.
* WADSIH AI Workshop Summariser
* As part of the Curtin Senior Leaders Forum 2024, we were contracted by the WA Data Science Innovation Hub (WADSIH) to develop a live AI workshop tool. The tool took input from 150+ Curtin employees spread across 15 groups. Our tool showed live insights into trending topics, real-time quotes, and generated a Word document report and PowerPoint summary for each group.