

# Hackathon Project

**Team:** All Your Base Are Belong to Taco Bell

**Version:** 2.0

**Last Updated:** 4/10/17

**Team:** Paul Dix, Matt Koster, Scott Seifert, Patrick Kaufman, Derek Higgins, Jeff Rose

# Event Details

- SharePoint Site:  
[http://community.nml.com/sites/etm/innovation\\_framework/hackathon/SitePages/BotHackathon2017.asp](http://community.nml.com/sites/etm/innovation_framework/hackathon/SitePages/BotHackathon2017.asp)
- Hackathon Dates (April 27<sup>th</sup> and 28<sup>th</sup>)
- Those two days will be 2 work days where we spend the entire day 'hacking' to complete the app.
- Location: Potawatomi
- Detailed Schedule: [http://community.nml.com/sites/etm/innovation\\_framework/hackathon/layouts/15/start.aspx#/SitePages/EventSchedule.aspx](http://community.nml.com/sites/etm/innovation_framework/hackathon/layouts/15/start.aspx#/SitePages/EventSchedule.aspx)

# Idea: FR Virtual Assistant

- FR's are very busy people
- They are often out of the office
- They lack time to spend with their AFR's (Assistant FR's)
- They have a lot of time where they cannot see and interact with traditional devices such as a computer or mobile device
- A voice controlled bot (i.e. Alexa) can act as a AFR and...
  - Communicate important information
  - Take actions on the FR's or AFR's behalf
  - Etc...

# Interviews with CRM Team (April 2017)

- Discussed our teams Hackathon with CRM Bus Analysts
- Ran the initial ideas we have past them
- Endorsed those, refined those, etc...
- Have resources that we can discuss our use cases with further
- May discover a few more deals or new ideas when we speak with them further

Started 4/5 to present and till  
Hackathon date....

# Use Case #1 – Appointment Assistant

- Call Queue
  - Daily status briefing – Read off call queue for an FR for the day
  - Highlight A and A+ clients on this list
- Follow Up Activities (CRM Workflow?)
  - List of follow up activities and due dates
    - What's behind, status, etc....
- It's an NM Mobile App already (Posting Plus)
  - Can get demo of that for the team
  - See that and how to incorporate our bot into Posting Plus

# Use Case #2 – SRC Status / CRM Opportunity Record

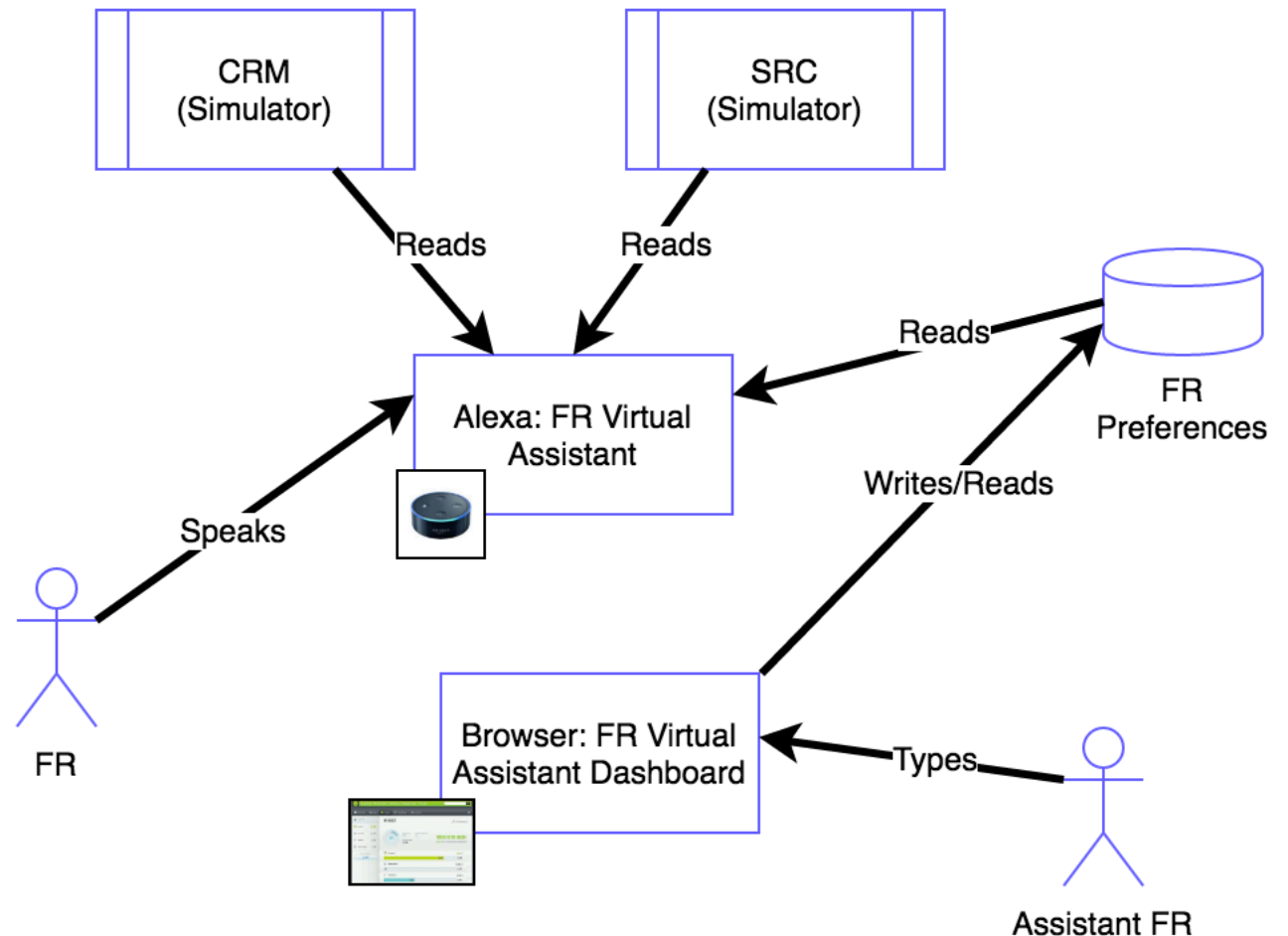
- Status on Service Requests on A+ and A Clients
  - Important enough to be on their daily status briefing
- CRM Opportunities Record
  - Tie SRC request to opportunities record
  - Need to research this integration for this

# Use Case #3 – Book of Business - Goals

- Book of Business is...
  - Tracks Sales to Sales Goals for FR's
- Goals vs. Actuals
  - Idea: Daily status – “Did you know you two DI sales short of your goal for this month?”
  - Idea: Daily status – “Did you know you are in 2<sup>nd</sup> place in your region for top LTC sales this quarter?”
- Discuss with BoB what are our actual use cases
  - Discuss how to expose these ‘Alerts’ to the Daily Status Briefing we do

# High Level Architecture (Full)

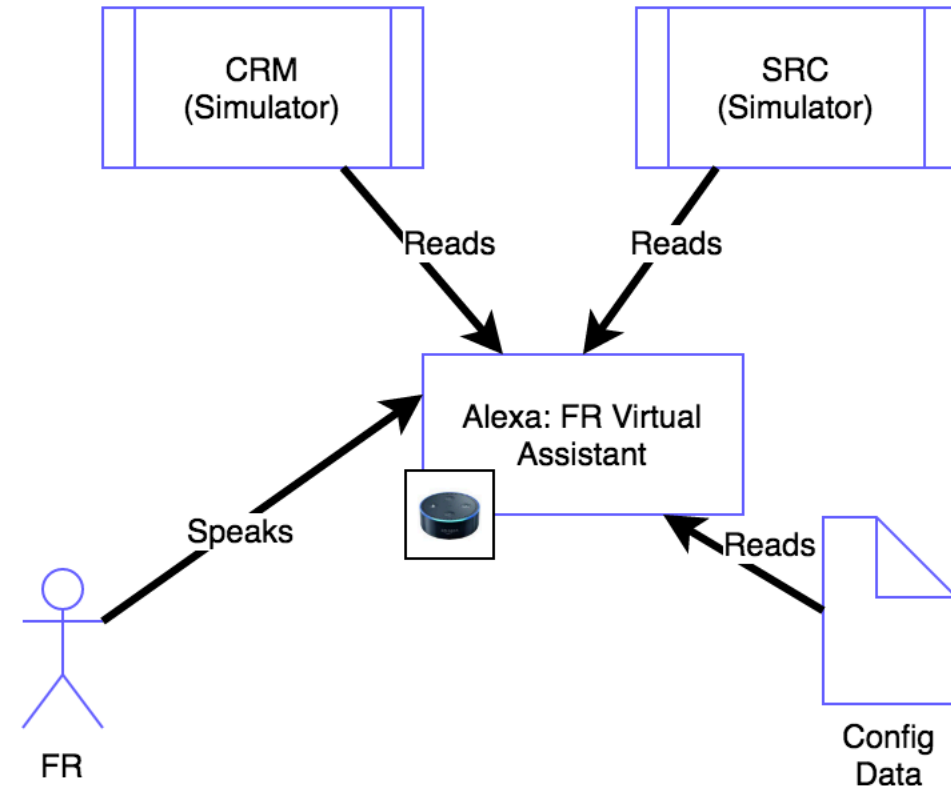
- FR does voice commands with Alexa
- Assistant FR uses Virtual Assistant Dashboard to optimize FR's experience (think preferences, tailoring, etc...)
- FR Preferences DB stores this information for FR Virtual Assistant skill to use when interacting with the FR
- Integrations with CRM, SRC and other NM systems are used to perform various tasks
- Could be Alexa or another technology
- Use from mobile device, car, dedicated device (AWS, Google), etc....





# High Level Architecture (MVP)

- FR does voice commands with Alexa
- IT support team sets up preferences as config data
- Integrations with CRM, SRC and other NM systems are used to perform various tasks



# Tools

- Alexa (actual or Amazon Developer Console tester)
- Python Alexa Skill
  - Python, Flask, Ask Flask packages
- ngrok
  - Reverse proxy for exposing locally running flask server for testing skills
- Atom
  - Editor
- Github
  - Store all code and doc in public github
  - Sample: <https://github.com/PaulJDix/nmhack17-sample-memorygame>
  - Don't need NM network connection or resources
- AWS Lambda function (python)

# CI/CD

- MVP
  - Use tools indicated to do all tests runs locally
  - Use Github to merge code base, single developer machine becomes prod
- Rel v 2.0
  - Use AWS Lamda python support
  - Deploy code to AWS Lamda manually
- Rel v 3.0
  - Pipeline (Frank's CI/CD toolset except with python)
  - Refer to recording of Alexa lunch and learn for more details

# Team Tasks

Number	Task	Assigned/Status
1	Alexa Python Service prototypes	???
2	Database and REST service	???
3	UX Flask Application	???
4	CI/CD Pipeline	???
5	Etc...	???

Trello Board:

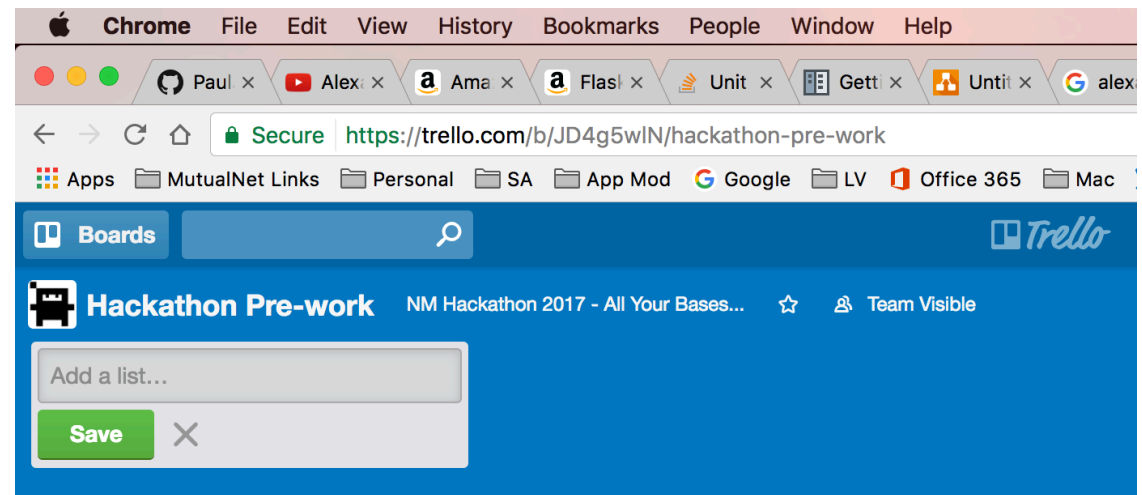
<https://trello.com/nmhackathon2017allyourbases>

Board for pre-work tasks

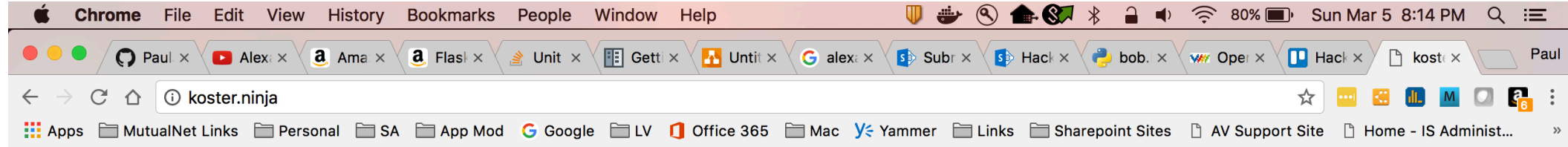
Board for 2 day event

Helps keep team organized

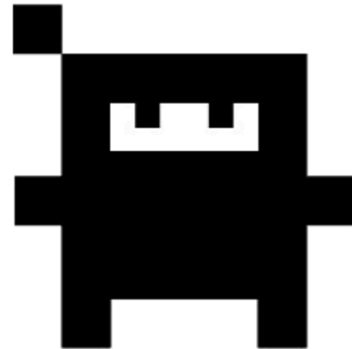
Simple, easy to use



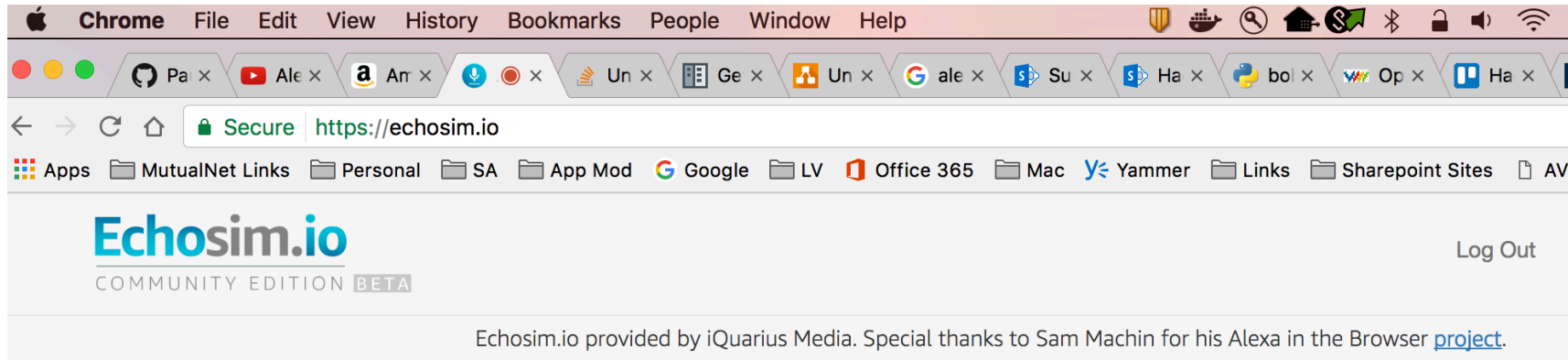
# Team Name



ALL YOUR BASE ARE BELONG TO TACO  
BELL

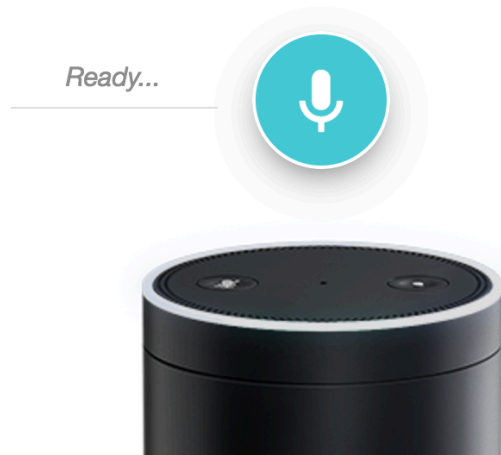


# Another Testing Tool... (<https://echosim.io/>)



## Alexa Skill Testing Tool

Click and **hold** the microphone button  
or hold down the space bar on your keyboard to activate the microphone.



# Appendix

# Use Cases (old list)

- **Calendaring**

- Setting: Early AM, FR coming into work
- Alexa reads all schedule meetings for the day so the FR does not need to open his calendar.

- **Service Requests**

- Setting: Anytime
- Alexa reads all open service requests where the FR is listed as the primary or secondary rep

- **Underwriting**

- Setting: Anytime
- Alexa reads all open UW cases where the FR is listed as the primary or secondary rep.

*Next team meeting: Generate more ideas. What's reasonable and doable?*