Project Management PLan

Fickle Nickel

**A computer with a coin on the screen

Description automatically generated**

**Project Overview:**

The Financial Report Q&A ChatBot project is designed to revolutionize user interactions with financial data by leveraging Natural Language Processing (NLP) techniques. This chatbot will engage users in conversations, addressing queries, and providing suggestions related to financial reports, statements, and market analysis. The project aims to enhance accessibility, facilitate quick decision-making, and improve user engagement within the financial industry.

**Scope of Project:**

The project entails the application of cutting-edge Natural Language Processing (NLP) techniques to construct a Financial Question Answering system. This involves model training using provided datasets, creating a user-friendly interface, and comprehensive testing for reliability. The project scope encompasses addressing diverse financial queries related to reports, statements, and market analysis, accommodating variations in both questions and content.

The system aims to achieve a predetermined accuracy/performance threshold, such as 90%, on a standardized test set, making it comparable to other market solutions in terms of performance metrics. Additionally, the project targets an average response time for queries that fall below a specified threshold.

The user interface is designed to input financial data and questions, display answers, and facilitate follow-up questions. Moreover, the system is geared to handle context and engage in conversations, demonstrating an understanding of domain-specific details in the financial realm effectively.

**Organization**

Project Team

• Delivery:

* Abu Bakar Siddique Al Karim
* Asitkumar Patel
* Liniya sheen
* Jashanpreet Kaur
* Neel Dharmendra Patel

• Client:

* Usman Ahmed
* Stanley Chor

Project Review Committee:

* Usman Ahmed
* Stanley Chor

Project Steering Committee:

* Usman Ahmed
* Stanley Chor

Change Control Committee:

* Usman Ahmed
* Stanley Chor

**Project Schedule:**

1. **Understanding the Project**

* Understanding the project charter and brainstorming ideas
* From Week 3 Day 1 to Week 3 Day 3
* Liniya, Jashan, Abu

1. **Learning about UI**

* Watching video material and taking notes from established UI’s
* From Week 3 Day 1 to Week 3 Day 5
* Neel

1. **Learning about LLM**

* Watching video material and taking notes from similar published papers
* From Week 3 Day 1 to Week 3 Day 5
* Asit, Abu

1. **Data Finalizing**

* To choose which financial path we are choosing based on the data available to us after consulting with PA.
* From Week 3 Day 4 to Week 4 Day 5
* Liniya, Jashan

1. **Model Building**

* Start building the model with a preliminary set of data.
* From Week 4 day 1 to Week 6 day 5
* Asit, Abu

1. **Build UI**

* Start developing the basic structure of the UI.
* From 4 day 1 to Week 7 day 5
* Neel, Jashan, Liniya

1. **Documentation**

* Start with the Scientific paper that to be written.
* From Week 8 day 1 to Week 8 day 5
* Neel, Jashan, Liniya

1. **Testing**

* Start testing our built model with different dataset with ROGUE AND BLEU score.
* From Week 7 day 1 to Week 8 day 5
* Asit, Abu

1. **Debugging**

* Adversities to be expected. This is buffer to keep everybody up to speed.
* From Week 10 day 1 to Week 11 day 5
* Asit, Abu

1. **Compare with other solutions**

* Consulting with the PA to agree on an optimum model.
* From Week 12 day 1 to Week 12 day 5
* Asit, Abu

1. **Beautification of UI and Deployment**

* Try to give final touch-ups to the UI and help deploying the final product.
* From Week 10 day 1 to Week 12 day 5
* Neel, Jashan, Liniya

1. **Project Closing**

* Finish up the paper, prepare for the final presentation.
* From Week 13 day 1 to Week 13 day 5
* Everyone

**Project Control:**

**Internal Team Meeting:** Everybody got together to understand the project specifications and to let everybody know their responsibilities and expectations. Any knowledge gap we have among our team members were addressed. We brainstormed different ideas to approach and explore. Also, different published sources were discussed to get notes on relevant topics.

**Progress Review Meeting:** We are keeping touch with everybody in the team to get a time-to-time update. The basic idea of it is to provide help where needed.

**Project Finance Management (N/A)**

• Budget Code

• Charging and Payment

• Accounting

• Management Reporting

**Risk Management**

• Refer to Risk Management Plan

**Communication Management**

• Refer to Communication Management Plan

**Change Management**

• Refer to Change Management Plan

**Stakeholders Management**

• Refer to Stakeholders Management Plan

**Deliverable Signoff Matrix**

|  |  |  |  |
| --- | --- | --- | --- |
| **Index** | **Deliverable Description** | **Acceptance Criteria** | **Signoff parties** |
| **1** | A report of a Clear understanding of the project with the PA | The report must be concise and ideas are written down | Usman Ahmed |
| **2** | Finalized dataset | Dataset of a specific stream which dictates the specific path to develop | Usman Ahmed |
| **3** | Research on a finalized path to approach | Research results that can be implemented in the model | Usman Ahmed |
| **4** | Understand and build a Basic LLM Model | Prototype model that responses accurately and timely | Usman Ahmed |
| **5** | A generative UI | It will show a structure of how we are designing our UI | Usman Ahmed |
| **6** | Test Results of our model on different Datasets | Good Rouge and BLEU score | Usman Ahmed |
| **7** | A working prototype of our project | It should show the glimpse of the final product | Usman Ahmed |
| **8** | Debugging | Any suggested changes or bugs should be fixed | Usman Ahmed |
| **9** | Beautification of UI and deployment | Presentable UI | Usman Ahmed |
| **10** | Project closing (Documentation) | Scientific paper and slides | Usman Ahmed |