



EAAI Team Summary

<Xiugou King>

23 – March 2022

Executive Summary

1. **Problems:** We found that banking industries often have to process a huge amount of information or data statistics. In recent years, most enterprise systems do not have the function of intelligent batch processing, and it often takes a lot of manpower and time to extract the target information in the file. These are very tedious and boring repetitive tasks.
2. **Solutions:** Therefore, we thought of using RPA+chatbot technology to develop an intelligent document processing and intelligent data analysis results. Use this technology to recognize complex textual information and customer needs.
3. **The value we create:** For enterprises, reduce labor and time costs and improve work efficiency; for customers, increase customer satisfaction during the use of the system.

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Team Name & Members

Our Team Number is: 28

Our Team Name is: Xiugou King

Our Team members are:

1. Tianhao Xu 2740825
2. Zeyang Zhang 2726114
3. Ruijia Lei 2733510
4. Han Lin 2724786
5. Yunan Lyu 2701217
6. Yiyang Qi 2721018

Problem statement

The working process in the bank requires lots of human resources and paperwork. However, working hard has no longer been the most dominant part of business success. Instead, people need to work smart. Redundant and formative works were squeezing dry the creativity of work and were a waste of human resources. People sit and type, fill and shred forms, come and go like walking dead. What spurred the business towards success was never the unreasonable resource management that transformed humans into machines. The tedious hard work should require only hard-working machines, not humans anymore.

To conclude, the main challenges are to improve the efficiency of the working process and to spare the limited human resource from redundant work.

Our team aims to improve the working process in the banks like opening and closing the account, whilst cutting waste of human resources and removing redundant workload.

Solution goal

The long term goal offers digital and intelligent transformation for our enterprise business customers like banks and financial institutions, by solving the applied combination of RPA and AI technology to form a wider range of services such as our main project the interactive intelligent customer service system about financial consulting and banking, it can handle simple and repetitive tasks for assisting stuff like core intent selection, splicing intelligent query from a self-developed knowledge base and automated process handling, whilst maximize the efficiency, increase employee engagement and productivity meanwhile improve customer satisfaction.

Quick persona



Lily Matthews

Hobbies & Interests:

- *Reading*
- *Dancing*
- *Participate in team projects*

Background:

- *Bank counter, 3 years ago*
- *lobby manager at Finance Enterprise, 1 year ago*

Challenges:

- *Communicate with customers*
- *Handle complex business relationships*

Demographics:

- *Female*
- *Age 28*
- *Annual Income \$ 200000*

Common Objections:

- *Stressful office environment.*

Goals:

- *Have more vacation*
- *Promotion to higher paying positions*

Biggest Fears:

- *Company layoffs*
- *Inability to build good relationships with colleagues*

Quick persona



Dylan Liu

Hobbies & Interests:

- Karaoke
- Watching movies
- Rock climbing

Background:

- Web front-end development programmer, 5 years ago
- Project managers at Internet-based companies. 2 years ago

Challenges:

- Coordinate between different teams
- Develop and maintain the company's online systems

Demographics:

- Male
- Age 29
- Annual Income \$ 50000

Common Objections:

- The company's overtime system
- Low-quality code for employees

Goals:

- Lead a larger team
- Have a Retirement Plan
- Add Text Here

Biggest Fears:

- Endless overtime due to company needs
- Lack of room for advancement

Quick persona



Jack Pearson

Hobbies & Interests:

- Playing Golf
- Playing soccer
- Photography
- Self-driving tour

Background:

- Working in marketing more than 10 years

Challenges:

- Attract more customers with reputation
- Learn digital knowledge for business transformation

Demographics:

- Male
- Age 48
- Annual Income \$ 100000

Common Objections:

- Employees are not united

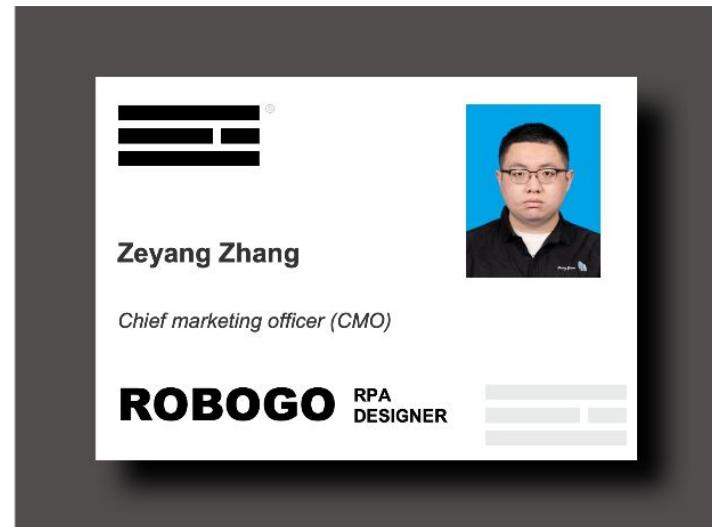
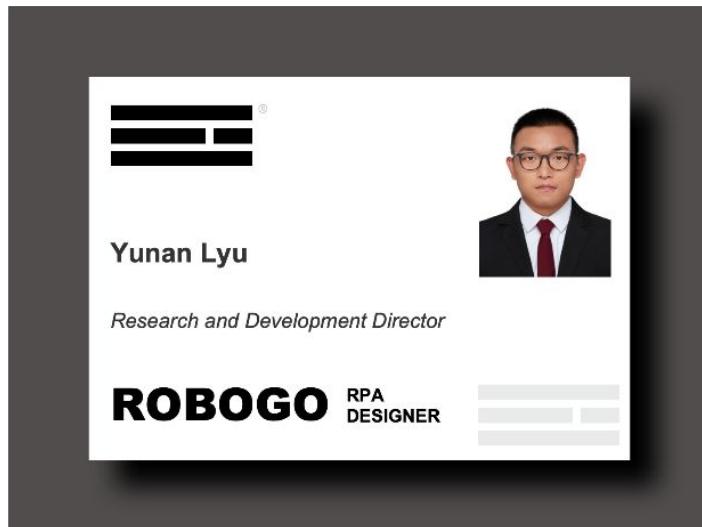
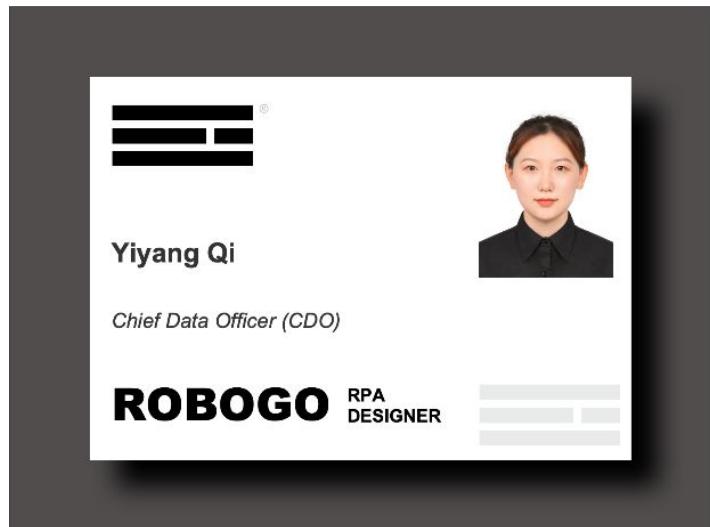
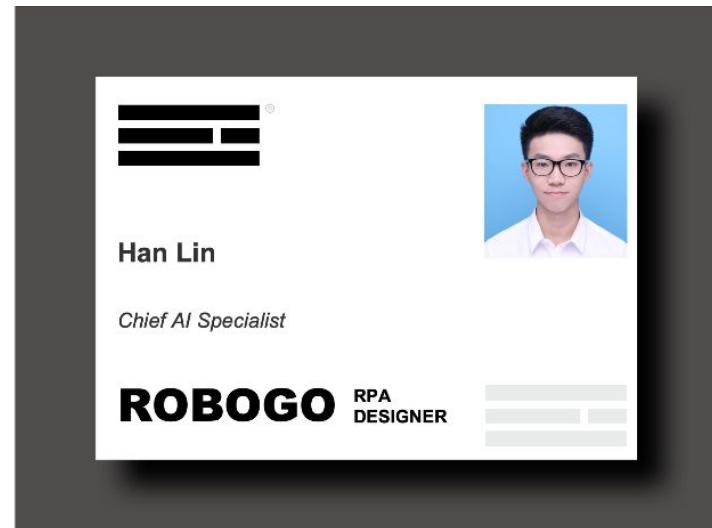
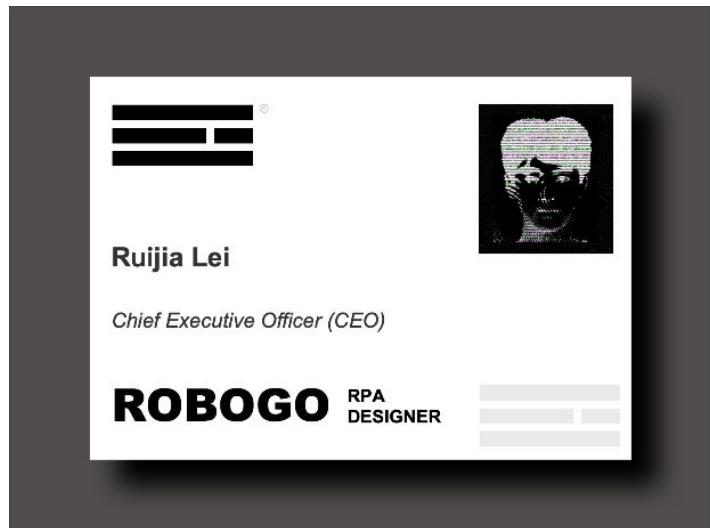
Goals:

- Have fewer working time per week
- Have a Retirement Plan

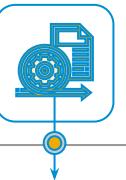
Biggest Fears:

- Business losses after retirement
- Difficult to keep up with the digital transformation of enterprises

Main personnel constitutes structure

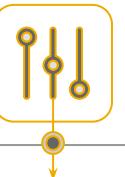
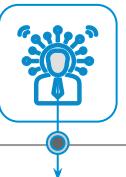
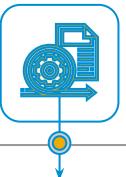


Stakeholder Matrix - Please duplicate the slide, if you have multiple matrices



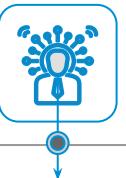
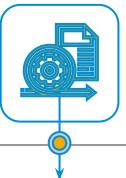
Stakeholder	Role / Position	Role in the project	Aware?	Interested?	Power
Tianhao Xu	Chief Product and Solutions Specialist	Product landing	✓	✓	High
Yunan Lyu	R&D Director	Research and Development	✓	Somehow	Medium
Zeyang Zhang	CMO	Market Manager	Somehow	Somehow	Medium
Han Lin	Chief AI Specialist	Provide AI Technical Support	✓	✓	Medium
Ruijia Lei	CEO	Business Decision Maker	✗	✓	High
Yiyang Qi	CDO	Management of information and data	✓	✓	Medium

Stakeholder Matrix - Please duplicate the slide, if you have multiple matrices



Stakeholder	Role / Position	Role in the project	Aware?	Interested?	Power
Robert Swaak	CEO of ABN	Project Sponsor	✓	somewhat	High
Linda Mayer	Leader of HR department	Customer	✓	✓	Medium
Sigrid Kaag	Minister of Finance	Government	Somehow	Somehow	Low
Daniel He	Employee	Product Developer	✓	✓	Medium

Stakeholder Action Plan for top 6 stakeholders



Stakeholder	Role / Position	Role in the project	Power	How to involve?	Actions
Tianhao Xu	Chief Product and Solutions Specialist	Product landing	High	Responsible for the product lifecycle	Make the product solutions
Robert Swaak	CEO of bank	Project Sponsor	High	Debit	Receive principal and interest
Ruijia Lei	CEO	Business Decision Maker	High	Management of the innovation process	Capital input
Zeyang Zhang	CMO	Market Manager	Medium	Explore the Market	Pricing and market search
Han Lin	Chief AI Specialist	Provide AI Technical Support	Medium	Participate in product research	Decide short-term and long-term technology direction
Linda Mayer	Header of HR department	Customer	Medium	Participate in product testing	Participate directly in the implementation process and continuously provide comments and suggestions.

Relevant experts

Expert	Role / Position	Attitude	Email	Phone	Actions
Yichuan Hu	CTO	 ☺	hu5731@gmail.com	+86 13380075230	Responsible for expanding the company, driving profitability
Wei Li	CEO	☺	wl4856995@163.com	+86 13281213050	Make decisions for the overarching technology infrastructure
Chao Luo	CSO	☺	h1436268171@qq.com	+86 15229296338	Position at the head of scientific research operations at organizations or companies performing significant scientific research projects

Relevant initiatives

Initiative	Contact / Role	Attitude	Email	Phone	Actions
RPA Labs	Brendan McKittrick /CEO	😊	/	/	Applied in automatic logistics systems
Blue Prism	Ian Horobin /Chief Product Officer	😊	/	/	Build a new operating model for financial services with intelligent automation
UiPath	Daniel Dines	😊	/	/	Automation for banking and financial services

List of candidates for Customer testing

Contact info



Zheng Liu

Financial Product Manager

billy07345@sina.com

The Industrial and Commercial Bank of China, Head Office

<http://www.icbc.com.cn/icbc/>

Beijing, China

Confirmations letter

Customer Testing Invitation



Dear Zheng Liu,

My name is Tianhao Xu, and I am a product and solutions specialist from ROBODO.

We are a company that specializes in RPA design. Our company is currently in the start-up phase and is working on the prototyping of the company website and a new interactive RPA product with cognitive intelligence. The prototype is expected to be ready by late March.

I know that your work is a product manager in the Industrial and Commercial Bank of China, Head Office. We would like to invite you to help us with an online user test of the prototype and provide some feedback. It would be great if you could give us some advice from your work experience.

I will inform you by email when the test will take place.

If you have any questions, please contact me.

Thank you.

Kind regards,



Tianhao Xu

ROBODO

Product & Solutions Specialist

+31(0)644214208 | t4.xu@student.vu.nl

Zheng Liu

List of candidates for Customer testing

Contact info



Yasong He
Project Development Director
+86 13505281008 | 825967716@qq.com

China Nuclear Industry Huaxin Capital Management Co., Ltd.
<http://www.cneccapital.com/>
Nanjing, China

Confirmations letter

Customer Testing Invitation



Dear Yasong He,

My name is Tianhao Xu, and I am a product and solutions specialist from ROBOGO.

We are a company that specializes in RPA design. Our company is currently in the start-up phase and is working on the prototyping of the company website and a new interactive RPA product with cognitive intelligence. The prototype is expected to be ready by late March.

I know that your work is project development in China Nuclear Industry Huaxin Capital Management Co., Ltd. We would like to invite you to help us with an online user test of the prototype and provide some feedback. It would be great if you could give us some advice from your work experience.

I will inform you by email when the test will take place.

If you have any questions, please contact me.

Thank you.

Kind regards,

A handwritten signature in black ink, appearing to read "Tianhao Xu".

Tianhao Xu
ROBOGO
Product & Solutions Specialist
+31(0)644214208 | t4.xu@student.vu.nl

Expert Interview Notes

Yichuan Hu

CTO



Question 1 Can you give some of the great benefits you think RPA can bring based on using a combination of RPA and AI to make a profit?

Hu: Our technology platform is easy to start with because it offers out-of-the-box models, drag-and-drop AI. And our products come with AI embedded, so deployment can be as easy as drag and drop. We combine Robotic Process Automation, Intelligent Document Processing, and Chatbots to help businesses increase efficiency and productivity across the entire life cycle of a business process.

Like in the Retail business, after deploy our order delivery service and customer service, Orders processing, tags generation and delivery management can be automated by RPA robots, RPA will ensure the accuracy of data inputting and most importantly, delivery and consulting is a boring work, and RPA will release staff from these repeat jobs.

Offering out-of-the-box models and easy drag-and-drop AI operations

Deploying the system with Simple mouse operation

Reducing the staffs out of the repetitive customer service and data manual operations

Expert Interview Notes

Yichuan Hu

CTO



Question 2 How did you discover that you were passionate about AI and RPA?

Hu: Just before I graduated from college, I wrote an infinite loop of code in C. Every second, I would click the mouse at a coordinate position. The procedure is simple, but it could replace tedious manual operation. However, it had a very fatal problem - it couldn't cope with business changes, the coordinates change.

It was not flexible enough, so we developed a program call "Wizard Button" to perform a series of mouse and keyboard actions in place of the user's hands. After few years to updating this program, we got experience on automatic technology. At about 2015 RPA ushered in "storm growth" and we followed the trend. And I paid more attention to the industry on the breakthrough of underlying technology and use RPA combined with AI, it is interesting to explore its landing application scenarios.

Being passionate about writing code that automates execution during college

Discovering the inflexibility of the code I write

Focus on underlying technology and use RPA combined with AI

Expert Interview Notes

Yichuan Hu

CTO



Question 3 What do you think are the pain points in the banking industry, and what can RPA help?

Hu:

We can see that traditional banks have the following PAIN points, like customer contact service pressure, service quality bottleneck, staff capacity can not be improved; high customer acquisition costs, lack of customer operation capabilities, sales funnel conversion rate can not be improved; traditional model data processing efficiency is low, etc..

RPA can do a lot, for example, intelligent financial robot, based on natural language understanding, knowledge mapping, intelligent search and intelligent recommendations and other technologies, to empower the whole business process of customer contact, provide personalized financial marketing, help banks to reduce costs and increase efficiency, improve the marketing turnover rate.

Traditional banks have many pain points. These are problems that ordinary human resources cannot solve.

The functions that RPA can do are more comprehensive and efficient than traditional manpower.

Combined with artificial intelligence technology, our goal is to reduce costs and increase efficiency for banks.

Expert Interview Notes

Chao Luo

CSO



Question 4 What are the benefits of combining RPA with AI?

Luo: Part of the aims of RPA are that it is utilized for organizations to achieve the seemingly incompatible goals of increasing customer satisfaction and employee morale while reducing operational costs. There are various gorgeous applications of AI that can be beneficial for RPA. For instance, we can apply natural language processing technology which contains neural network model with optical character recognition to accelerate the processing of documents.

AI helps it make RPA's basic tasks faster and more accurate, and AI can be understood as an expert in providing state-of-the-art technology. Rpa provides the solutions and ability for tasks that are automatically executed and AI plays the role of efficiency enabler and accuracy guarantor.

Part of RPA's goal is to improve customer satisfaction and employee morale.

AI technology can provide many gains in RPA production capacity.

We need to master the most advanced AI technology to ensure the efficiency and accuracy of the company.

Expert Interview Notes



Chao Luo

CSO

Question 5 Based on the previous question, can you give some specific business or framework designs for RPA products in combination with banking companies?

Luo: For customers: RPA procedure can improve or replace the traditional reception like counters. Procedures like registering or deregistering bank accounts with RPA only require physical documents(ID, financial related), and the rest of them could be all taken care of by automatic processes.

For employees: RPA can perform as the introducer to train newcomers to get them familiar with working procedures or some fundamental skills. For the more advanced purposes, RPA can analyze the data from previous sales and automatically adjust responding techniques like increasing the deposit in the bank or modifying interest.

We could aim at providing users with convenient operation.

Businesses that can develop bank data analysis in the future.

Expert Interview Notes

Guanchun Wang

CEO



Question 6 By the way, if the product is for medical industry, how does that apply?

Wang: First, intelligent guidance robot can be put into use. It provides guidance services for patients before making an appointment. Under the guidance of the robot, it helps patients choose the registration department and doctor, providing convenience for patients and reducing hospital manpower investment.

In addition to this, RPA can also be used as a medical assistant. It uses NLP to understand user intentions and extracts retrieval conditions. At the same time, robots are used to achieve pre-job training and assessment of medical representatives, and to quickly improve sales capabilities.

Also, relying on the knowledge map, a detailed data system of diseases, patients and medical treatment is established, which is convenient for doctors to query and analyze, and provides a reference for scientific research and diagnosis of diseases.

We can extend to the medical field as well in the future.

RPA works as an assistant to recognize the basic disease.

RPA recommends and verifies the doctor's diagnosis.

Expert Interview Notes

Guanchun Wang

CEO



Question 7 Do you have some insight of future trends and innovations in the RPA industry?

Wang: I have seen some predictions. Gartner predicts that by 2022, 90% of the world's large organizations will apply RPA in some form; through 2024, the RPA market will continue to experience high double-digit growth. Therefore, in the future, the RPA market will grow at an ultra-high-speed, and in order to adapt to this market, there will be many innovative breakthroughs.

First, AI will be deeply integrated with RPA, such as strengthening NLP, OCR, deep learning and other fields, and automatically make predictions based on structured and unstructured data. The second is it would realize Hyperautomation, which automates discovery, analysis, design, measurement, monitoring, and reassessment. In the future, RPA will also be applied with a variety of non-IT systems (such as HR systems and financial systems), helping to minimize human errors and ensure data accuracy and visibility.

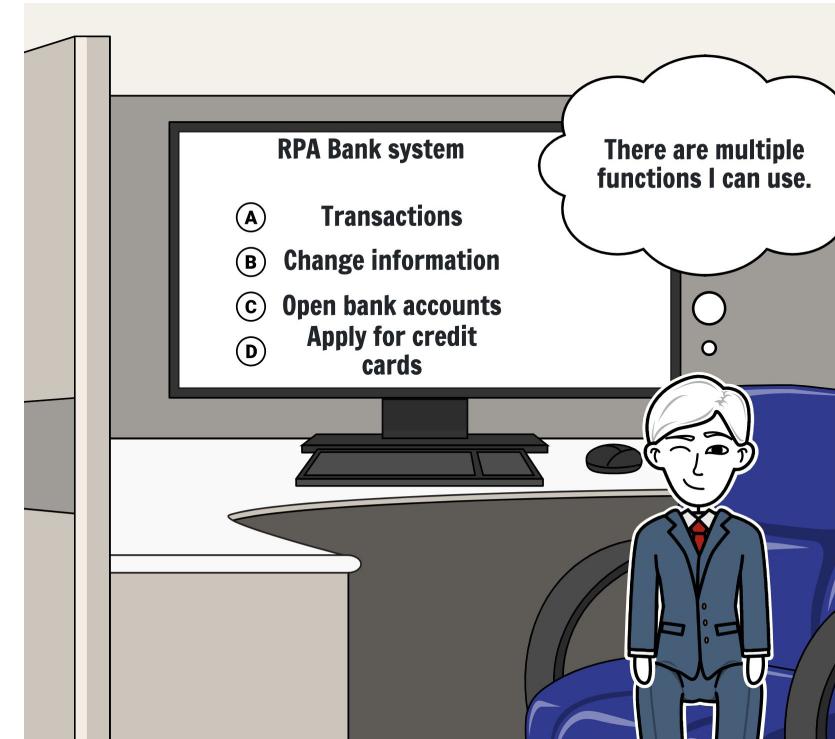
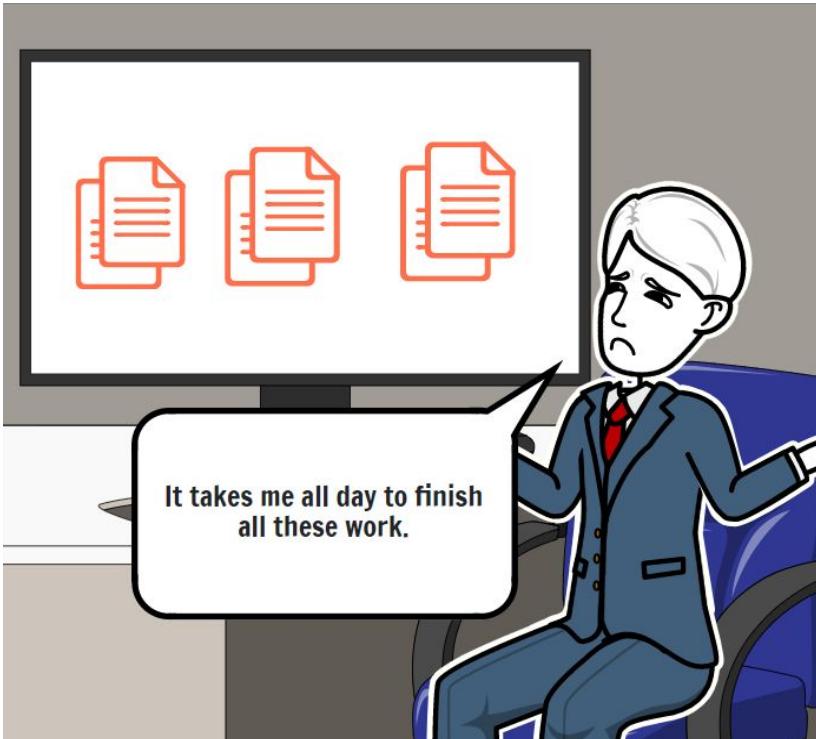
The combined application of RPA and AI is inevitable.

Our project may work on NLP and other factors to enhance recognition accuracy and match user expectations.

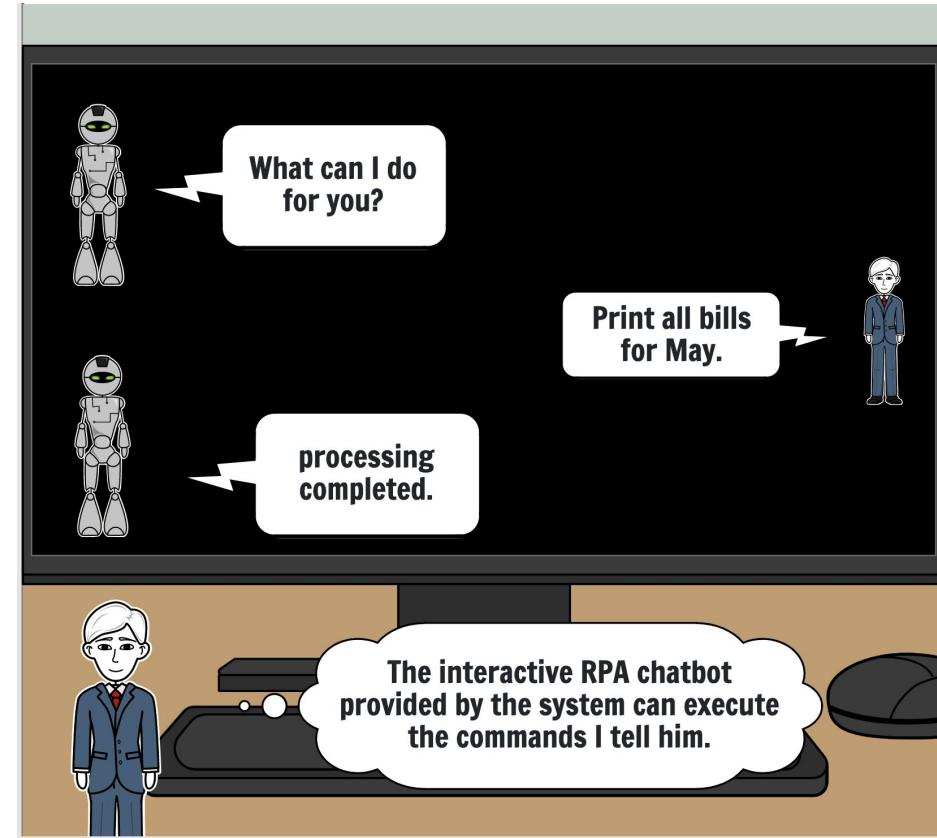
RPA has a variety of application scenarios and a large market space.

Storyboard

Storyboard



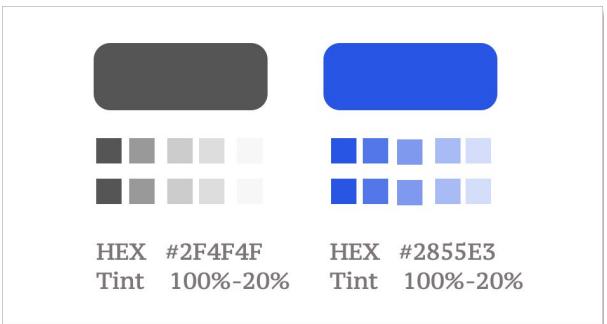
Storyboard



Product analysis

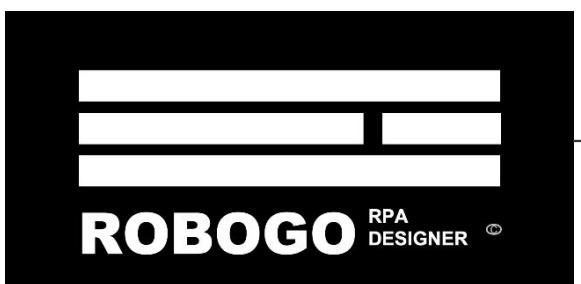
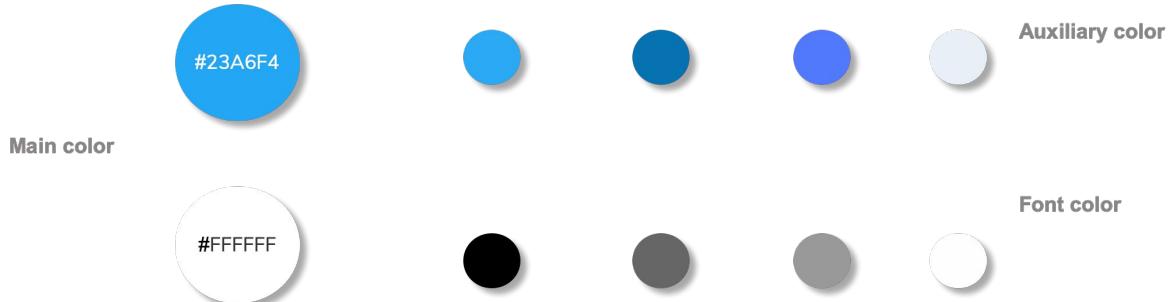
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Software main color



COLOR

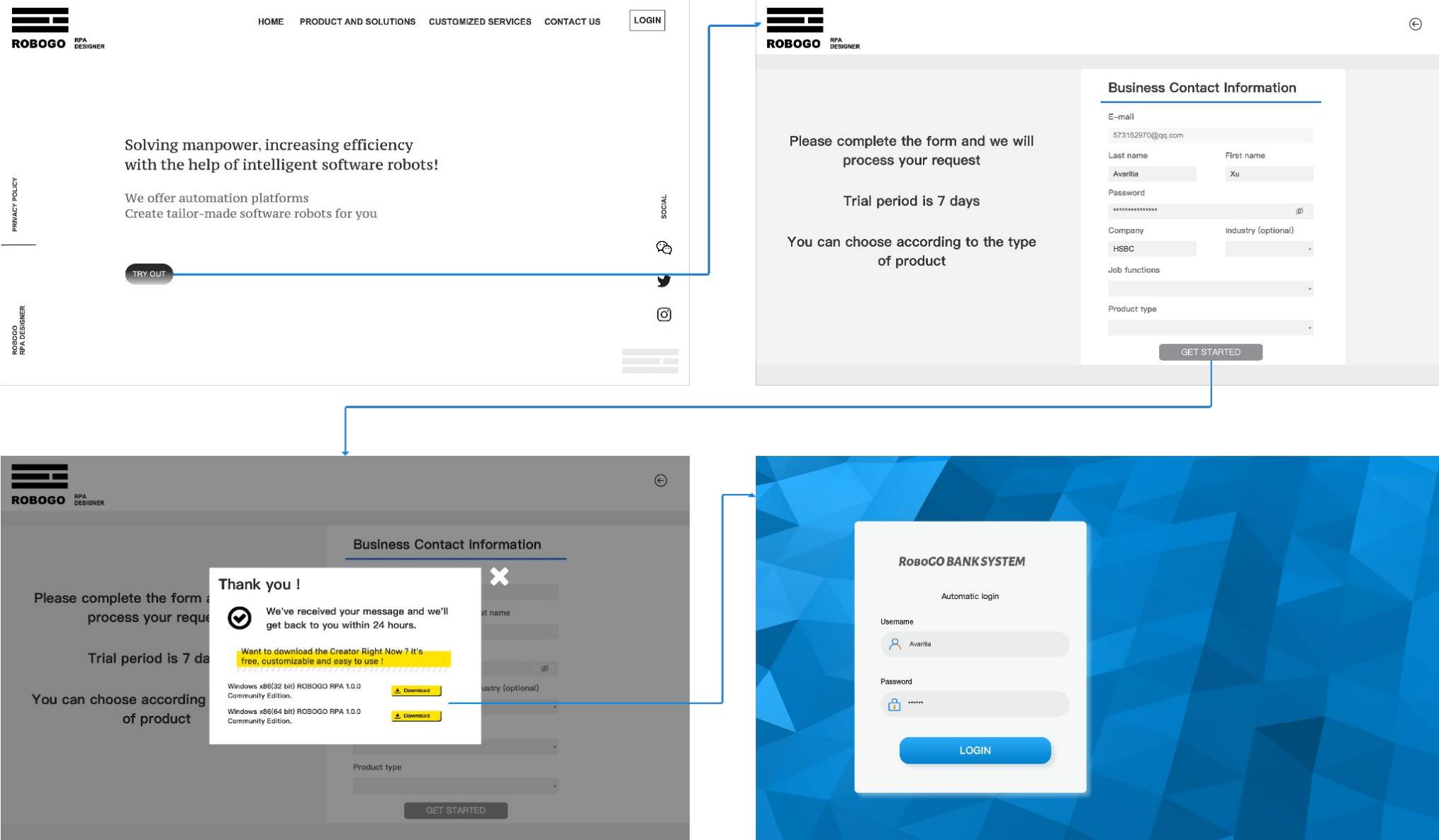
Logo



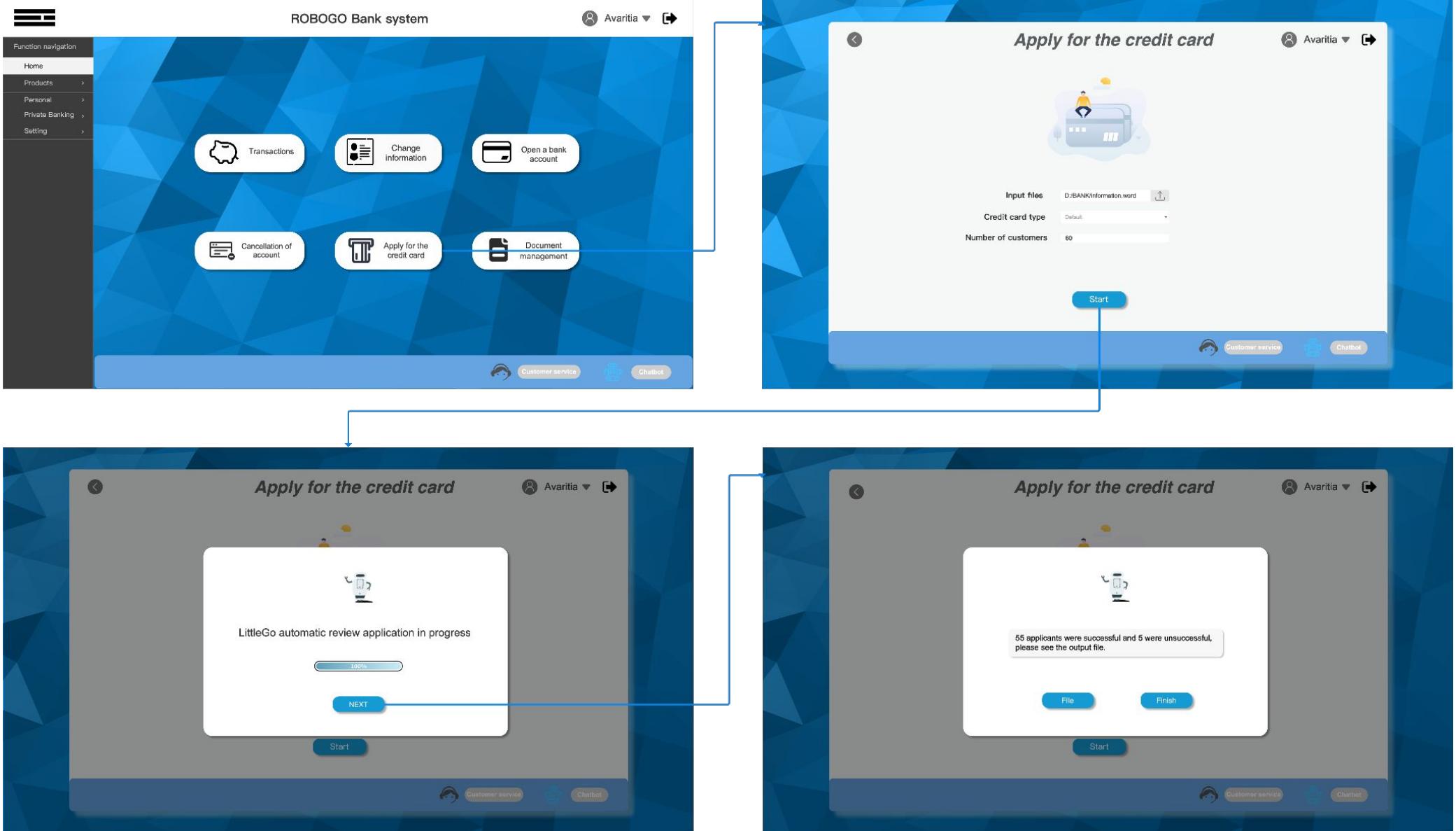
- Linear
- Colorful
- Regular font with concise bars
- Simple and clear visual effect, full of design sense

At the top of the logo, there are three horizontal bars that represent the content of the document that the customer want us to analysis, while a black vertical bar in the middle of the bar means that our automated robot is reading and processing the files. This logo can clearly describe what our project are working on. And at the bottom of the logo, it shows the project name and the technology that the project mainly uses.

Prototype



Prototype



Prototype

The image displays three screenshots of a Document Management system interface, illustrating the process flow from file input to output and the integration with a LittleGo AI service.

Screenshot 1: Document Management - File Input

This screenshot shows the initial state of the document management system. It features two tables: one for existing files and one for new files. The "File Input" button is highlighted, indicating the current step. The "File Output" button is also present. The interface includes a "Customer service" and "Chatbot" section at the bottom.

File name	Modified date	Type	File size
Asset certificate	2022/03	PDF	1.3MB
ID card	2022/03	JPG	50KB
Application form	2022/04	WORD	90KB

File name	Modified date	Type	File size
Asset certificate_new	2022/05	PDF	1.3MB
ID card_new	2022/06	JPG	50KB
Application form	2022/08	WORD	80KB

Screenshot 2: Document Management - File Output

This screenshot shows the system after the files have been processed. The "File Output" button is now highlighted. The "File Input" button is still present. The interface includes a "Customer service" and "Chatbot" section at the bottom.

File name	Modified date	Type	File size
Asset certificate	2022/03	PDF	1.3MB
ID card	2022/03	JPG	50KB
Information	2022/04	WORD	80KB

File name	Modified date	Type	File size
Asset certificate_new	2022/05	PDF	1.3MB
ID card_new	2022/06	JPG	50KB
Application form	2022/08	WORD	80KB

Screenshot 3: Document Management - LittleGo Integration

This screenshot shows the system integrated with LittleGo. A LittleGo AI window is overlaid on the main interface, displaying various messages and progress bars. The "File Input" button is highlighted. The "File Output" button is also present. The interface includes a "Customer service" and "Chatbot" section at the bottom.

LittleGo messages:

- LittleGo: Hello, my name is LittleGo. What can I do for you?
- LittleGo: Please add profile file in acceptable formats: pdf, word, txt.
- LittleGo: Please wait, I'm working on it.
- LittleGo: Application form.pdf (100%)
- LittleGo: 05 applicants were successful and 5 were unsuccessful. Please see the application log.

Customer service message:

Please send customers details of application results.

Chatbot message:

Please wait, I'm working on it.

Customer service message:

OK, Finish.

Chatbot message:

Thank you for using LittleGo.

Prototype

The image displays three screenshots of a "Document Management" application interface, connected by blue arrows indicating a flow or relationship between them.

Screenshot 1: Main Document Management View

This screen shows two tables of documents:

File name	Modified date	Type	Size
Asset certificate	2022/05	PDF	1.3MB
ID card	2022/05	JPG	500KB
Application form	2022/05	WORD	890KB

File name	Modified date	Type	Size
Asset certificate_new	2022/05	PDF	1.3MB
ID card_new	2022/05	JPG	502KB
Application form	2022/05	WORD	890KB

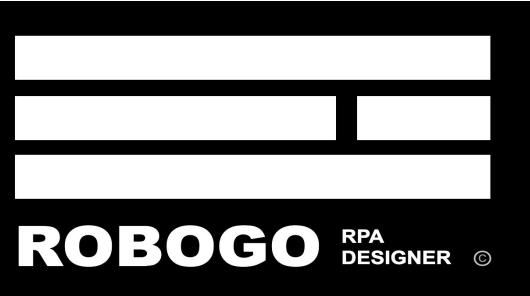
Buttons for "File Input" (with an upload icon) and "File Output" (with a download icon) are visible on the left. A sidebar on the right lists categories like "Assets", "Applications", and "Services".

Screenshot 2: File Selection Dialog

A modal dialog titled "File Input" shows a file selection tree and a list of files:

- My Computer > Desktop
 - 1.pdf
 - 2.pdf
 - 3.pdf
 - 4.pdf
 - 5.pdf
 - 6.pdf
 - 7.pdf
 - 8.pdf
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Pitch demo



Pain & Gain

**Lots & Lots of
REDUNDANT
and
TEDIOUS WORK**

Let robots do it!

Our Product RPA

- **Focus on Bank business**
- **help bank officers.**

Unique

- **Combine RPA and Chatbot.**
- **Interact with people.**



Function navigation
Home
Products >
Personal >
Private Banking >
Setting >

Traditional RPA Vs. RPA Chatbot

File name	Modified date	Type	File size
Asset certificate	2022/3/5	PDF	1.3MB
ID card	2022/3/6	JPG	502KB
Application form	2022/3/6	WORD	985KB

File name	Modified date	Type	File size
Asset certificate_new	2022/3/5	PDF	1.3MB
ID card_new	2022/3/6	JPG	502KB
Application form	2022/3/6	WORD	985KB

File name	Modified date
Asset certificate	2022/3/5
ID card	2022/3/6
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Pain and Gain

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Our Product - RPA

Foucs on Bank
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Unique:
Combine RPA and
Chatbot.
Interact with
people.

Live Demo!

Let's Go!

Summary of learnings

Summary of learnings <Xiugou King> - Final

How well did your team work together? Think of 'opposing perspectives'; are there any? Which ones and how do you deal with them? And, as a team?

Our group has worked flawlessly over the past two months. There are regular 2-3 video conferences via zoom every week. Each time is chaired by the team leader, Tianhao Xu, and each team member has a friendly exchange of opinions or brainstorming. On weekdays, each team member also communicates through WeChat to keep the project updated and report on their progress.

We have encountered "opposing perspectives" in the choice of business objectives. Some team members want our plan to focus on RPA in medical institutions, while others think that RPA in financial enterprises is more suitable. Finally, background information on these two industries was searched through our interviews with professionals and various members of the group. We have a preliminary understanding of the development of RPA in various industries. Since RPA in healthcare institutions involves many specialized system requirements, we unanimously decided to plan RPA for financial enterprises.

Summary of learnings <Xiugou King> - Final

What role(s) did you take as a leader? How did it work out?

Tianhao Xu:

At the first stage, I gathered all ideas and innovations from team members, led the team to do further research on these topics, and finalized the idea about RPA.

During the sprint, I, as a coordinator, examined outcomes and the process of each team member to make the whole teamwork on the right track and keep our consistency.

Han Lin:

During the sprint, we change our roles to make everyone get familiar with the product and our business process. Mainly I was in charge of describing and introducing our product in detail. And I was trying to beautify and organize the product as our elaborately decorated art.

Ruijia Lei:

During the sprint, I brought quite a lot of insights and brilliant ideas.

My role most is the critic of our team. I thought over and over about the outcomes and results. Also, I made all team members re-think what they have done and what can be improved.

Summary of learnings <Xiugou King> - Final

What role(s) did you take as a leader? How did it work out?

Yiyang Qi:

During the sprint, I broadened our team's version by sharing others' ideas and suggestions from my network. I functioned as the bridge connecting the team and outside worlds. Using my network made the discussion and innovation process no longer an insides talk. Instead, it became the conversation of our team and other opinions around the world.

Zeyang Zhang:

During the sprint, My role changed after each section since I am capable to fix problems and patch the vulnerability of our team and project. I was in charge of inspecting what we missing and what we still needed to work on. And handle the surprises and incidents during our product building process.

Yunan Lyu:

During the sprint, I took notes of everyone's idea and their plans to merge them into our blueprint. After each discussion and work session, I made team members take a break from our forward process to look backward at what we have done and how we have done it. I summarize the main points of each version of the product and meetings to make us a self-reflection and hopefully an improvement.

Summary of learnings <Xiugou King> - Final

What are your take-aways as you resume your professional life?

Throughout the career life we think there are several important lessons that we have learned:

- 1.**It is very important to conduct the necessary tests before the official launch of the product. This allows us to fully understand user needs, gather informative data, and provide the necessary user data to support R&D. With this approach, we can truly focus on the users and develop and optimize the features they really need and care about.
- 2.**When the decision is made is much more important than what the decision is made. Before starting each decision process, consider how much time and effort the decision is worth.
- 3.**Make it a habit to speed up execution process. If a plan can be executed immediately and strongly, even if the plan is not perfect, this is better than a perfect plan that will come out next week. Because the efficiency gains from plan execution will be better than pointless time wasting, and imperfections can continue to be optimized in the process of execution.

Summary of learnings <Xiugou King> - Final

What are your take-aways as you resume your professional life?

- 4.**The competencies of each individual on the team need to be kept up at all times so that strong execution can be built. The team needs to develop high-impact and impactful projects to do, while ensuring that they are in line with their respective interests, desired value creation and desired growth path. If this is done, everyone on the team will be motivated and passionate in their work.
- 5.**Determining a company's "purpose", "position" and "personality", referred to as the 3P, is a key step in building a well-known brand.
- 6.**Concentrate on developing products that really work for the user population and solve their real needs with a simple, easy-to-use product. As a startup, you can't help but develop as many features for your product as possible, but often the cost and development effort is wasted and the focus is distracted, so instead focus on certain real pain points.

Annexes

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- 1 Customer journey
 - 2 Lightning demos
 - 3 Expert interviews
 - 4 Customer interviews

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Customer journey

- Customer Journey for Enterprise Custom Service
- Customer Journey for Online Store

Lightning Demos

- Emotibot
- LAIYE

Expert interviews

- Yichuan Hu
- Chao Luo
- Guanchun Wang

Customer interviews

- Zheng Liu
- Yasong He

Customer Journey

Customer Journey for Enterprise Custom Service



Ideas to Improve

Buying Cycle



Acquire Days

Customer Goals

- Find customers for experiencing the product

Touchpoints

- Online research
- Site visit
- Social media

- What is the RPA chatbot?
- Is it necessary on enterprise?
- What is the price of this product?
- Are there any other competitors offering cheaper price and better usage?

Customer Thoughts



Overall Customer Experience

Recommendations

- Encourage more customer engagement on social media
- Make our the user's trial process is smoother
- Make UI more simple & user-friendly

- Provide the most useful personality dialogue mechanism, omit useless functions
- Streamline the buying process

- Give discount for long-term customers
- Stay in contact with the customer & request a review
- Provide free maintenance service to improve customer satisfaction
- Offer the technical advice and tutorial to encourage multiple purchases



Nurture Days

- Make sure the system fit the company business
- Find the best price and suitable services bundle

- Click on promotional email
- Visits product page
- Experience the trial process on the RPA chatbot with sample data
- See the analysis graphs and AI responses

- Do they have safety policy for the enterprise?
- Am I paying too much?
- Is it convenient for all the staff to use?
- What functions can this RPA chatbot do?
- What is the difference between the normal management assistant?



Convert Days

- Decide on custom services & place order

- Add custom services order to cart
- Estimate business value
- Calculate the cost and benefit of the usage

- What is the payment process?
- Do they have system maintenance services?
- If the system is not suitable, can you refund or change the service



Retain Days

- Have a continuous service that suit different situation of the business in company

- Order processed email
- technical consulting desk
- customer service for the product

- Does the bug or failure getting fixed efficiently?
- Is there any discount for the long-term cooperation enterprise?
- How to change the service bundle?
- Who can we ask for the technical problems?



Customer Journey for Online Store



Ideas to Improve

Buying Cycle



Acquire Days

Customer Goals

- Find customers for experiencing the product

- Online research
- Site visit
- Social media

- What is the RPA chatbot?
- Is it necessary on online shopping?
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- Are there any other competitors offering cheaper price and better usage?



Touchpoints

Customer Thoughts

Overall Customer Experience

Recommendations

- Encourage more customer engagement on social media
- Make our the user's trial process is smoother
- Make UI more simple & user-friendly

- Provide customize design for each enterprise
- Streamline the buying process
- Offer the technical advice and tutorial to encourage multiple purchases and cooperate

- Give discount for long-term customers
- Stay in contact with the customer & request a review
- Provide free maintenance service to improve customer satisfaction



Nurture Days

- Make sure the system can give the effective responses for customer
- Find the best price and usage

- Click on promotional email
- Visits product page
- Experience the trial process on the RPA chatbot with sample data
- See the commodity recommendation and AI responses

- Do they have safety policy for the customer information?
- Are we paying too much?
- Is it convenient for the customer to know how to use the AI chat?
- What can this service do to reduce mutual operation?
- What is the difference between the normal customer service?



Convert Days

- Decide on purchase & place order

- Add service order to cart
- Estimate business value
- Calculate the cost and benefit of the usage

- What is the payment process?
- Do they have system maintenance services?
- If the system is not suitable, can you refund or change the service?



Retain Days

- Have a continuous and updating service that suit different situation of the customer operation

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- Does the bug or failure getting fixed efficiently?
- Is there any discount for the long-term cooperation enterprise?
- Who can we ask for the technical problems?



Lightning Demos

Emotibot

Emotibot Technologies is committed to the research and development of cutting-edge artificial intelligence technology, natural language understanding, image recognition, and speech emotion recognition.



EMOTIBOT

Key elements

- 1. VCA Smart Customer Service : An intelligent human-machine collaboration system that helps enterprises realize online services.**
- 2. Zhujian Elf: It can give users warm and interesting responses in open-domain chat scenarios, and can quickly access various channels.**
- 3. Voice platform: Provide intelligent voice services based on speech recognition, speech synthesis, intelligent interruption and speech emotion detection**
- 4. Multimodal Emotional Digital Human: Help avatars become able to read, have memory, self-learning, and truly understand human language and expressions.**

LAIYE

Laiye Technology combines RPA and AI to achieve intelligent automation as they have built an intelligent automation platform to build, manage and cloud top software bots.

Key elements

1. Deep learning dialogue engine with outstanding performance
2. Graphic building experience without coding, making business people masters of robot creation
3. Support multi-language, rich media interaction, and personalized responses, and make dialogues colorful and individualized
4. Provide rich, open APIs, platform access and upgraded expansion capabilities



Expert Interviews

Expert interview

Yichuan Hu

CTO

1. Ph.D., Department of Electrical and Systems Engineering,
University of Pennsylvania
2. Co-founder and CTO of Laiye Technology, mainly responsible for
technical implementation and target management
3. To build an integrated intelligent automation platform



Expert interview

Chao Luo

CSO

1. Co-founder and CSO of "Lai Ye", responsible for investment and financing, strategy and corporate marketing.
2. He has worked in Tencent Investment and Bain Consulting and participated in numerous investment, M&A and strategic projects.
3. Holds a bachelor's degree in electrical engineering from Shanghai Jiaotong University and an MBA degree from MIT.



Expert interview

Guanchun Wang

CEO

1. PhD of Princeton University, Internet entrepreneur, co-founder of Watch Tonight.
2. Internet entrepreneur, co-founder of Agannet and Laiye.



Customer Interviews

Zheng Liu

Financial Product Manager



Do they understand?

1. Liu is a product manager at ICBC and their bank is using RPA to help them streamline their business processes. So he thought our product was very good and he was willing to promote it.
2. He introduced us to the RPA application scenarios they were using and the areas that needed the most improvement, so with his help we developed our business direction and long term goals that would, for example, improve the efficiency of online credit card applications.
3. He suggested that we resize the prototype design drawing to fit the size of a web page in a real working environment.

Develop our business direction

Confirm the long term goals

Resize the prototype design drawing

Customer interview format (2/3)

(How) Does it solve?

Key elements

1. As a bank employee, the RPA has greatly improved the efficiency of the entire company approval process for my reimbursement of expenses incurred due to business travel.
2. When referring to the processing flow, I must mention that once I scan and import a standard reimbursement claim form, the RPA system firstly shows that it is being processed. I don't know what's going on here, but compared to the old way of manual review by passing to different administrative staff that could take hours or even days, using RPA system might only take a few minutes, which is very efficient.
3. The prototype design drawing was resized to 1920*1080 for a better fit on the web.

The system automatically compares the image content in the reimbursement form with the system input, and reviews the compliance and completeness of the reimbursement content.

Moreover, according to the reimbursement policy, it will return the approval opinion, and for those approved, realizes automatic bookkeeping, record review and payment. Those are what we focus on.

The long-term goal of our company is to try to improve the efficiency of internal administration.

Customer interview format (3/3)

What other projects/initiatives also tackle the same challenge?

Key elements

1. RPA Labs, Brendan McKittrick(CEO)

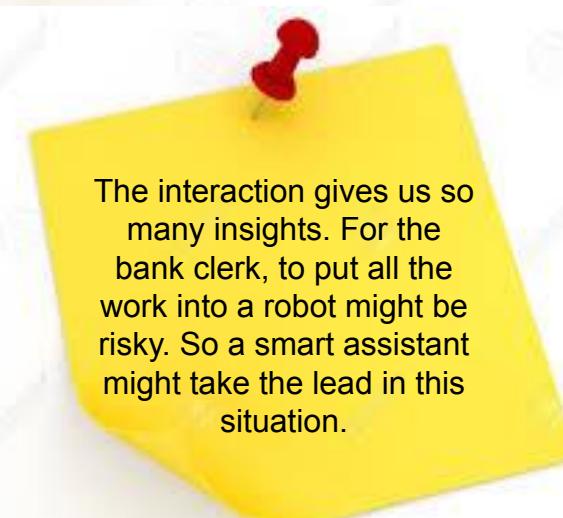
RPA Labs provides products for logistics to manage the tracking system. It serves as a quick-deployment, independent system to the existing system.

2. Blue Prism, Ian Horobin(Chief Product Officer)

Blue Prism focuses on the automatic robotic process, especially the interaction between human workers and robots.



Our project targets the bank. And the bank system is highly secure and also vulnerable. The idea of "as an independent system" is what we want to make our product a non-invasive and safe third-party service.



The interaction gives us so many insights. For the bank clerk, to put all the work into a robot might be risky. So a smart assistant might take the lead in this situation.

Yasong He

Project Development Director



Do they understand?

1. Her company haven't use RPA before. She was very interested in this product after our presentation and was ready to start to use it from the company's sales department and fund investment department.
2. Yasong takes part in fund affairs of her company and RPA was introduced and used in the fund department for assisting the publication, data monitoring and maintenance. She has been very helpful in advising us on the design of our RPA interactions through her project experience.
3. She suggested that we can introduce more data-related features and combine NLP techniques in text processing to make the work more efficient.

Help us design
our RPA
interactions

Suggest us
focus on the user
experience

Draw the
high-fidelity
prototype

Customer interview format (2/3)

(How) Does it solve?

Key elements

1. It is quite beneficial for a lot of affairs. Especially for something which will utilize data control functions like investment transaction opening monitoring and data management, fund product establishment, issuance, change, maintenance, liquidation, etc.

2. Yasong's projects contains helping the company publish quarterly fund reports, and the financial statements, various asset details, expense details, share status and other data in the fund's periodic reports are subject to a series of accounting and auditing by the accounting firm.RPA robot combined with NLP technology can replace the manual extraction of report data from Word documents to Excel tables, and combined with all the collocation verification, system data verification, can all data verification work can be completed quickly and efficiently.

For funds and other investment transactions, RPA is very beneficial because our products are extremely sensitive to data

We have focused on many processes and improved and added more features during the launch and maintenance of our fund products

Customer interview format (3/3)

What other projects/initiatives also tackle the same challenge?

Key elements

1. UIPath, Daniel Dines

UI Path provides a similar product for banks and finance systems. It got mature and whole packages for different kinds of activities. It has also grown a complete business pattern for customers from the trial demo to the actual application.

The products are similar to the others in the interviews. What attracted us was the business and profit model UI Path developed. It makes RPA a package rather than an unknown and complex system.

Customers can easily apply for demos and subscribe to the services.

UI path is the one that has a similar service as ours. It warns us not to take the old track they took, so we bring the interaction like "chatbot" into our product.

Thank you.

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