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## Stage 2: User-orientation

### 2.1 Greetings & Self-introduction

***NOTE: Please update “Robo-” with its name according to condition (Max in Dominant, Linus in submissive)***

|  |  |  |
| --- | --- | --- |
| Serial No. | Dominant version | Submissive version |
| 1 | **Robo-** Hello! My name is **Max,** how are you doing?  **User-** [I am doing okay][I’m feeling good] | **Robo-** Hello! My name is **Max,** how are you doing?  **User-** [I am doing okay][I’m feeling good] |
| 2 | **Robo-** I have been working at Wealsome Capital as a financial advisor for 3 years. I am chosen and trusted by many customers for wealth management.  **Robo-** I’d like to share with you more about my work  **User-** [Yes, please!][Okay, I don’t mind] | **Robo-** I have been working at Wealsome Capital as a financial advisor for 3 years. Many customers have chosen and trusted me for wealth management.  **Robo-** Would you like to know more about my work?  **User-** [Yes, please!][Okay, I don’t mind] |

### 2.2 Q&A Session

|  |  |  |
| --- | --- | --- |
| Serial No. | Dominant version | Submissive version |
| 1 | **Robo-** QA1-D-Q1  **User-** [QA1-A1] **[**QA1-A2] | **Robo-** QA1-S-Q1  **User-** [QA1-A1] **[**QA1-A2] |
| 2 | **Robo-** QA2-D-Q2  **User-** [QA2-A1] **[**QA1-A2] | **Robo-** QA2-S-Q2  **User-** [QA2-A1] **[**QA1-A2] |
| 3 | **Robo-** QA3-D-Q3  **User-** [QA3-A1] **[**QA3-A2] | **Robo-** QA3-S-Q3  **User-** [QA3-A1] **[**QA3-A2] |

### 2.2 Task-orientation

|  |  |  |
| --- | --- | --- |
| Serial No. | Dominant version | Submissive version |
| 1 | **Robo-** TO1-D-Q1  **User-** [TO1-A1] **[**TO1-A2] | **Robo-** TO1-S-Q1  **User-** [TO1-A1] **[**TO1-A2] |
| 2 | **Robo-** TO2-D-Q2  **User-** [TO2-A1] **[**TO2-A2] | **Robo-** TO2-S-Q2  **User-** [TO2-A1] **[**TO2-A2] |
| 2 | **Robo-** TO1-D-Q1  **User-** [TO3-A1] **[**TO3-A2] | **Robo-** TO3-S-Q3  **User-** [TO3-A1] **[**TO3-A2] |

## Stage 3: Experiment

### 3.1 Asset allocation

|  |  |  |
| --- | --- | --- |
| Categories | Dominant version | Submissive version |
| Underperform | **Robo-** D-UP1  **Robo-** D-UP2  **Robo-** D-UP3  **Robo-** D-UP4  **Robo-** D-UP5  **Robo-** D-UP6  **Robo-** D-UP7  **Robo-** D-UP8  **Robo-** D-UP9  **Robo-** D-UP10  **Robo-** D-UP11  **Robo-** D-UP12  **User-** [UP1-1][UP1-2]  **User-** [UP2-1][UP2-2]  **User-** [UP3-1][UP3-2] | **Robo-** S-UP1  **Robo-** S-UP2  **Robo-** S-UP3  **Robo-** S-UP4  **Robo-** S-UP5  **Robo-** S-UP6  **Robo-** S-UP7  **Robo-** S-UP8  **Robo-** S-UP9  **Robo-** S-UP10  **Robo-** S-UP11  **Robo-** S-UP12  **User-** [UP1-1][UP1-2]  **User-** [UP2-1][UP2-2]  **User-** [UP3-1][UP3-2] |
| Outperform | **Robo-** D-OP1  **Robo-** D-OP2  **Robo-** D-OP3  **Robo-** D-OP4  **Robo-** D-OP5  **Robo-** D-OP6  **Robo-** D-OP7  **Robo-** D-OP8  **Robo-** D-OP9  **Robo-** D-OP10  **Robo-** D-OP11  **Robo-** D-OP12  **User-** [OP1-1][OP1-2]  **User-** [OP2-1][OP2-2]  **User-** [OP3-1][OP3-2] | **Robo-** S-OP1  **Robo-** S-OP2  **Robo-** S-OP3  **Robo-** S-OP4  **Robo-** S-OP5  **Robo-** S-OP6  **Robo-** S-OP7  **Robo-** S-OP8  **Robo-** S-OP9  **Robo-** S-OP10  **Robo-** S-OP11  **Robo-** S-OP12  **User-** [OP1-1][OP1-2]  **User-** [OP2-1][OP2-2]  **User-** [OP3-1][OP3-2] |
| Balanced performance | **Robo-** D-BP1  **Robo-** D-BP2  **Robo-** D-BP3  **Robo-** D-BP4  **Robo-** D-BP5  **Robo-** D-BP6  **Robo-** D-BP7  **Robo-** D-BP8  **Robo-** D-BP9  **Robo-** D-BP10  **Robo-** D-BP11  **Robo-** D-BP12  **User-** [BP1-1][BP1-2]  **User-** [BP2-1][BP2-2]  **User-** [BP3-1][BP3-2] | **Robo-** S-BP1  **Robo-** S-BP2  **Robo-** S-BP3  **Robo-** S-BP4  **Robo-** S-BP5  **Robo-** S-BP6  **Robo-** S-BP7  **Robo-** S-BP8  **Robo-** S-BP9  **Robo-** S-BP10  **Robo-** S-BP11  **Robo-** S-BP12  **User-** [BP1-1][BP1-2]  **User-** [BP2-1][BP2-2]  **User-** [BP3-1][BP3-2] |