#### **1. Welcome and Introduction**

* **Speaker:** Andy Clark
* Andy welcomed attendees and provided an overview of the session's goals, emphasizing the integration of AI in IDP and the participation of architect Kamal for detailed technical insights.

#### **2. Overview of Intelligent Document Processing (IDP)**

* **Speaker:** Andy Clark
* IDP is a platform used across Sun Life North America for document processing and understanding.
* Significant volume of documents (50 million pages annually) processed, with only 9% automation in health and dental sectors.

#### **3. Current State and Challenges**

* **Speaker:** Andy Clark
* Existing platform (Kofax) is outdated with limited automation capabilities.
* High manual intervention required, leading to inefficiencies and errors.
* Need for automation to enhance accuracy and efficiency.

#### **4. New IDP Platform**

* **Speaker:** Andy Clark and Kamal Boorghani
* **Key Points:**
  + New platform developed with Nudesic offers high accuracy, fast development, and low maintenance.
  + Utilizes modern architecture: Node.js, React front end, serverless architecture.
  + Employs Azure Cognitive Services and OpenAI for advanced data extraction and processing.
  + Capable of handling structured, semi-structured, and unstructured documents.
  + Expected benefits include improved customer experience, operational efficiency, and better data utilization.
* **Technical Insights by Kamal Boorghani:**
  + New platform overcomes challenges of high variation in forms.
  + AI-driven classification and extraction of data.
  + Pilot testing underway to assess performance, including handling handwriting recognition.

#### **5. Q&A**

* **Chris Dahle:**
  + Asked about the volume of documents and the proportion of digital end-to-end processes.
  + **Response:** 10-15 million unique documents with over 1000 types. Few digital end-to-end processes currently; efforts are ongoing to digitize more workflows.
* **Anshul Kathuria:**
  + Inquired about the trend in document volume.
  + **Response:** Volume has stabilized around 45-48 million annually; slight decrease due to digital initiatives, but paper use remains significant.
* **Gervine Rekhi:**
  + Questioned the accuracy of handwriting recognition.
  + **Response:** Initial tests are promising; more data will be available post-pilot.

#### **1. Introduction to GenAI Patterns**

* **Speaker:** Gurveen Rekhi
* **Key Points:**
  + GenAI has been in use for over one and a half years, with significant contributions under Laura’s sponsorship.
  + More than 30 experiments conducted, leading to the identification of key reusable patterns.
  + Focus on using controlled AI solutions through AWS infrastructure rather than open internet-based solutions.

#### **2. Overview of Chatbot Implementations**

* **Speaker:** Gurveen Rekhi
* **Key Points:**
  + Chatbot patterns have been widely successful across various teams for document-heavy tasks.
  + Sun Life has implemented chatbots for multiple departments including global investments, Asia and Philippines, Canada Advisor Hub, and more.
  + These chatbots can be developed and deployed within 2-3 weeks, offering a quick and efficient solution for information retrieval and knowledge management.
* **Demo:** Chatbot Interface
  + **Presented by:** Deepankar Pant
  + Showcased a chatbot trained on Sun Life Global Investments documents.
  + Demonstrated the retrieval of information and linking to source documents.
  + Highlighted features such as copying responses, exporting session history, and multilingual support (English and French).

#### **3. Summarization Patterns**

* **Speaker:** Gurveen Rekhi
* **Key Points:**
  + Used for creating summarized reports from large sets of documents.
  + Applications include executive summaries, call center reports, and portfolio summaries.
  + Can generate actionable insights and minutes of meetings from discussions.

#### **4. Employee Productivity Enhancements**

* **Speaker:** Gurveen Rekhi
* **Key Points:**
  + Tools like Microsoft 365 Co-pilot and Amazon Q Apps are being explored to enhance developer productivity.
  + These tools assist in code generation, commenting, and application build-out.
* **Q&A:**
  + **Andy Clark:** Inquired about maintenance and monitoring of the solutions.
    - **Response:** Minimal maintenance required due to automated document indexing and refreshing. Monitoring handled through a dashboard tracking usage metrics.

#### **5. Q&A and Demos**

* **Demo:** GenAI Applications in Sun Life
  + **Presented by:** Deepankar Pant
  + Showcased the use of a controlled internal version of GenAI for tasks like creating executive reports.
  + Demonstrated prompt engineering for generating detailed and structured responses.
* **Questions:**
  + **Arun Chander:** Asked about the standard platform for recording patterns.
    - **Response:** Patterns are recorded and managed in a centralized GitHub repository, enabling quick replication for new requests.