AI-Powered Financial Chatbot (MVP)

Project Brief and Requirements Document

## Project Overview

**Project Summary:** This project aims to develop a minimum viable product (MVP) of an AI-powered chatbot for a financial institution. The chatbot will answer frequently asked questions and provide basic financial advice. The chatbot will be deployed on a cloud service provider to ensure availability and scalability. The primary goal is to quickly deliver a functional MVP that enhances customer service and reduces the workload on customer support staff.

## Key Objectives:

* Develop a basic chatbot capable of handling common customer inquiries.
* Provide basic financial advice functionalities.
* Deploy the chatbot on a cloud service provider for reliability and scalability.
* Ensure data security and privacy compliance.

## Timeframe

**Two weeks**

## Role Responsibilities

**DevOps Engineer**

* Set up and manage CI/CD pipelines.
* Automate deployment processes.
* Ensure cloud infrastructure is secure and scalable.

**Software Test Engineer**

* Develop and execute test plans.
* Perform functional and UAT testing.
* Report and track bugs and issues.

**Data Engineer**

* Integrate basic financial databases and APIs.
* Ensure data quality and integrity.

**Developer**

* Develop backend services and APIs using Java or C#.
* Ensure chatbot integration with backend services.
* Ensure application performance and reliability.

**Business Analyst**

* Gather and document business requirements.
* Act as a liaison between stakeholders and the development team.
* Ensure the solution meets business needs and compliance requirements.

**PMO/Project Support**

* Assist with project planning and scheduling.
* Track project progress and prepare status reports.
* Facilitate communication and coordination among team members.

## Deliverables

* Detailed project plan and requirements document.
* Chatbot conversation flow and integration design.
* Developed and tested AI-powered financial chatbot (MVP).
* Deployment and CI/CD pipelines.
* Basic user documentation and training materials.
* Final project report and closure document.

## Success Criteria

* Chatbot meets all documented business requirements.
* Successful deployment to the cloud environment.
* Positive feedback from user acceptance testing.
* Compliance with relevant data security and privacy regulations.
* Project completed within the specified timeframe and budget.