Q & A

The purpose of this document is to provide answers to questions that the project team may ask during the requirements gathering phase.

### **Q:** What are the primary goals of this chatbot?

**A:** The primary goals are to enhance customer service by providing quick and accurate responses to frequently asked questions and basic financial advice, thereby reducing the workload on customer support staff.

### **Q:** What specific types of financial advice should the chatbot provide?

**A:** The chatbot should provide basic financial advice such as tips on saving money, understanding basic financial products (e.g., individual savings accounts, loans, etc.), and general budgeting advice. It will not provide any personalized financial planning or investment advice.

### **Q:** Are there any specific tools or technologies that we must use?

**A:** Suggested tools and technologies include Dialogflow or Microsoft Bot Framework for the chatbot, Java, Python, or C# for backend services, Jenkins for CI/CD, Docker for containerization, and Postman for API testing. The choice of the cloud provider (AWS, Azure, or GCP) should be finalized based on team expertise and license availability.

### **Q:** Who will be the primary users of this chatbot?

**A:** The primary users will be customers of the financial institution who need quick answers to their questions and basic financial advice. This includes both existing customers and potential new customers visiting the institution’s website or app.

### **Q:** What are the criteria for success for this project?

**A:** Success criteria include meeting all documented business requirements, meeting all requirements documented during requirements elicitation, successful deployment to the cloud environment, positive feedback from user acceptance testing, compliance with relevant data security and privacy regulations, and completing the project within the specified timeframe.

### **Q:** How will we handle user authentication and authorization?

**A:** (Out of scope, not required.) In future, user authentication can be integrated with the financial institution’s existing authentication system, likely using OAuth or a similar secure method. Authorization levels will be defined to ensure users can only access appropriate information.

### **Q:** What is the expected traffic or load on the chatbot?

**A:** Initially, the chatbot will serve a limited user base as we gather feedback and make improvements (it’s an MVP). We anticipate moderate traffic, which will scale over time. We should design the system to be scalable to handle increased usage as needed.

### **Q:** What are the main functionalities that need to be included in the MVP?

**A:** The MVP should include the ability to answer common FAQs and provide basic financial advice.

### **Q:** How will we ensure data security and compliance with privacy regulations?

**A:** You should follow and document industry best practices for data encryption, access controls, and compliance with relevant regulations such as GDPR and CCPA.

### **Q:** What data sources will the chatbot integrate with?

**A:** The chatbot will integrate with any necessary internal databases that contain FAQs. Additionally, it may access publicly available financial APIs for real-time data if necessary. This could include 3rd party data accessed through an API for example.

### **Q:** Which cloud service provider are we using?

**A:** We can choose between AWS, Azure, or GCP based on the team's expertise.

\* We need to check licenses are available for this, too.

### **Q:** What tool should be used for bug tracking?

**A:** Jira

### **Q:** What should the MVP look like?

**A:** A web application with a simple, intuitive front-end.

### **Q:** How will user feedback be collected and used?

**A:** You can gather a group of potential users (team members, trainers, pre-assignment Spartans outside of the project group) and run a beta testing deployment with them. Feedback should be collected carefully and in a structured manner, so that the data gathered can be reported on. Any insights drawn should be discussed by the project team, so that appropriate adjustments and improvements can be made before the next release.