

# SDR AI – A Lead Summarization AI Assistant

## Frequently Asked Questions

- **What is SDR AI used for?**
  - SDR AI is a tool for assisting Sales Development Representatives (SDRs) in accessing customer information in a shorter time. The goal is to facilitate informed interactions with customers leading to better conversion rates.
- **What is a LEAD ID?**
  - This is an HPE specific marketing lead identifier, and always begins with “LEAD-”. All information provided by the tool is pivoted towards a marketing lead ID queried by the user, either at the account level or at the contact level.
- **What is the timeframe of the available lead data?**
  - The tool has access to lead data, whose create-date starts on or after November 1<sup>st</sup>, 2022.
- **What sources does SDR AI get its data from?**
  - All data sources accessible to the tool are derived from various tools whose data flows into the backend marketing data lake (hosted on Vertica FRANK or CDR). Following are the data sources from which information associated with the lead is extracted:
    - Lead & Sales Opportunity: SFDC
    - Orders & Shipment: MDM (Ordering system)
    - Install Base & Service Agreements: IBSV
    - Digital Responses: Adobe, 6Sense, Marketo
    - Related Contacts: Marketo
    - Chat Conversations: Drift
    - Account Firmographics: SFDC, D&B, HG Insights, Internal classifications
    - Model Recommendations: PTB, GPI, DVI, 6Sense
    - Competitive Landscape: ComplB
  - Note that SDR AI does not have access to public sources on the internet. It only leverages the above listed data sources to answer questions related to a given lead ID.
- **Can I use SDR AI to look for publicly available information about the lead or account?**
  - No. The tool does not have access to the internet. It only uses a standard list of data sources procured by HPE.
- **How often is SDR AI data updated?**
  - The underlying data for the tool is updated every 6 hours. So, the tool has access to information available before the update date. This update date is provided on the tool as “Data Available Until” time.
- **I don’t see updated information on SDR AI. What do I do?**
  - The tool is updated once every 6 hours to sync with underlying data sources. Rarely, the data sync may be delayed due to network or system issues. Whenever such issues occur, there could be delays in data sync. If you encounter such data issues, please inform us by creating a ticket by clicking “No” for the question “Is the result correct?”.

- **What do I do if SDR AI continues to return an incorrect answer?**
  - If you find that the answer provided by the tool is unsatisfactory, you can click on the “Regenerate Answer” button for that specific question. This enables the tool to regenerate the answer. If this regenerated answer is incorrect, you can provide feedback related to the answer by clicking “No” to the “Is the result correct” question. This triggers a feedback response being recorded, which is tracked and used by our team to update the tool accordingly. In addition, the user can create a ticket with additional information useful for developers to recreate, debug and correct the error.
  - Another way to generate an answer would be to ask the question with more qualifications whenever possible. This will enable the tool to get additional context from these qualifications to answer the question.
- **What is Data Validation?**
  - The SDR AI tool utilizes a set of data sources to generate an answer to a given question. The “Data Validation” interface provides a view of the underlying raw data that the AI uses to generate the answer. This can be used to either validate the answer from underlying database tables, or to identify other relevant information in the raw table that can be useful for the user.
- **What is the underlying technology that enables SDR AI?**
  - SDR AI leverages ChatHPE (Azure OpenAI models) to generate an answer to a given question. It uses a combination of methodologies to extract relevant information from underlying data sources such as prompt engineering, vector databases, and agent-based mechanisms depending on the complexity of the question and size of the data queried from various data sources. Note that the solution is hosted within HPE firewall and cannot be accessed without proper authorization or authentication.
- **What is the time frame for “recent” data?**
  - The AI typically computes data recency using available date values in the data and today’s date based on the context of the question. Nevertheless, the historical timeframe of data available for the tool depends on the data source, and it ranges from past 6 months to past 3 years.
- **What does SFDC stand for?**
  - Salesforce Dot Com
- **For a given lead ID, what is the historical time frame of available data associated with an account or contact?**
  - Below table provides the historical timeframe of available data for a given lead ID.

Data Type	When given lead is open	When given lead is closed
Other Leads	Recent 6 months	From 6 months before closed date to closed date
Other SFDC Opportunities	Recent 6 months	From 6 months before closed date to closed date
Orders & Revenue	Recent 3 years	From 3 years before closed date to month of closed date
Model Recommendation	Latest	Latest
Digital Activity (Web + Email)	Recent 3 months	From 3 months before closed date to closed date
Chat Activity	Recent 6 months	From 6 months before closed date to closed date.

- **What is an active deal registration?**
  - An active deal registration refers to an SFDC opportunity record, which is in the Open or Working status.

- **What is a purchase?**
  - A purchase refers to a product being shipped to the customer, and its revenue realized by HPE. Please note that this data refers to the MDM system and is different from the opportunity revenue available in the SFDC system.
- **What does digital activity mean in relation to a lead?**
  - A digital activity associated with a lead indicates the historical web or email interactions we capture
- **What is an engagement in web digital activity?**
  - A hpe.com web visitor (who has provided consent to be tracked by Adobe Analytics) is considered engaged if they either spend 3+ minutes in a web session, view a web document or asset, view a video, or start a chat conversation during a web session.
- **What is a web document?**
  - A web document or an asset refers to the PDF documents hosted on hpe.com, containing content produced by HPE related to the web page on which they are situation.
- **What are interactions in marketing emails?**
  - These are responses to email marketing campaigns from the contact associated with the given lead ID, captured by Marketo. These responses include email opens and email clicks (click on a link that is part of a Newsletter or Nurture campaign),
- **What are digital topics of interest?**
  - Digital topics of interest are based on the Digital Visitor Intelligence (DVI) model, which considers recent web page visits to pages on hpe.com containing content related to various topics of interest. A degree of interest for a particular topic is computed is based on various recent engagements and the volume of visitors from the customer account to web pages containing content related to the topic. A high score indicates a higher degree of digital interest in that topic by the account relative to their own historical interest level and historical interest level by other accounts within comparable cohort (i.e., same account segment, geo etc.).
- **Who is the known contact associated with the account?**
  - Known contacts are those that belong to the customer account (i.e., mapped via MDCP Org ID, STID, or Party ID) available on Marketo.
- **What are sales recommendations?**
  - These are product and customer purchase interests derived from various data science models built based on historical customer purchase and digital behavior history. There are two types of models,
    - 1<sup>st</sup> party PTB (Propensity-to-Buy) and GPI (HPE-GreenLake-Potential-Index) models (built and maintained by the HPE Marketing Data Science team).
    - 3<sup>rd</sup> party 6Sense models (built by 6Sense).
- **What is the difference between PTB & 6Sense model recommendations?**
  - There are two types of PTB or Propensity-to-Buy models: Overall and Product Specific product categories. These models predict the likelihood of an account to buy HPE hardware/software/service in the next 6 months. This propensity to buy recommendations are based on AI/ML models that use first-party data (including revenue, orders, SFDC pipeline, telemetry, digital behavior) and third-party data (including firmographics, IT budgets, non HPE install base, digital behavior outside of hpe.com). Recommendation levels are
    - GOLD: High PTB or High digital engagement on hpe.com.
    - SILVER: Mid PTB or High digital engagement outside of hpe.com.
  - 6Sense models are only for overall product categories. The scores are based on SFDC pipeline, first and third-party digital behavior. There are 2 types of models: Buying-Stage & Profile-Fit. The Buying-

Sage model recommendations can be interpreted as the purchase stage of the account, whereas Profile-Fit model recommendations can be interpreted as account alignment with products based on customer profile. Recommendation levels at

- Buying-Stage: Purchase, Decision, Consideration or Awareness
- Profile-fit: Strong or Moderate

- **What does BANT mean?**

- BANT stands for Budget, Authority, Need and Timeframe. The tool indicates whether each of these elements have been established with the customer for the given Lead ID.

- **What are personas associated with an account, and how are they derived?**

- A Persona is a class or group of contacts having similar job profile. HPE groups known contacts into 7 distinct personas: C-Level LOB (Line of Business), C-Level IT, Executive LOB, Executive ITOPs, Data Scientist, Engineer/Architects, and ITOPs. A contact is classified into a persona group using known job title, description, and responsibilities.

- **How does the SDR AI tool identify account level data associated with marketing leads?**

- We use either an STID (Sales Territory ID), MDCP Org ID, or Party ID to identify account level information. So, if a lead is not associated with any of these account identifiers, then there is no account-level information available for the tool to answer questions.

- **How is the value an account generates measured?**

- The value generated by an account refers to the revenue realized when the product is shipped to the customer.

- **What are keywords searches and what does popularity mean?**

- As part of the 6Sense data, they provide intent keywords for each account, referring to the keywords researched by the account outside of hpe.com. The tool accesses this information to identify topics that the account may be researching. Popularity is then defined by a higher count of searches that 6Sense identifies for each keyword.

- **Who do I contact if I have additional questions on the tool?**

- Please send your questions, concerns or comments to
  - Zainab Jamal: [zainab.jamal@hpe.com](mailto:zainab.jamal@hpe.com)
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