



Hewlett Packard
Enterprise


HOW TO USE SDR AI

June 2024

Selecting a Lead with a LEAD ID

Lead Id *

Submit Clear



Option 1:

Users can **manually enter** a Lead ID into the text box with only its numerical values



Here are a few recent Lead IDs you can try

By classification


▼ Cold

- LEAD-0012390279
- LEAD-0012390291
- LEAD-0012390251
- LEAD-0012390263
- LEAD-0012390259

▶ Hot

▶ Warm 1

▶ Warm 2



By status

▶ Closed

▶ Open

▶ Rejected

▶ Working

Option 2:

Users can **select** a recent Lead ID from the drop-down menu based on its classification or status

Inputting Customer Information Query

Account Firmographics

What does the company do?

Where is the company located?

How big is the company?

Account SFDC Pipeline

Are there any active deal registrations related to the company? If so, what are they?

What are any recent opportunities on the account both recently closed and open?

Account Lead Pipeline

Are there any other open leads (other employees) attached to the account that any other person may be contacting? If so, which are those?

Are there any duplicate contacts/leads?

Are there any internal employees attached to the account (owners of other deals)? If so, who are they?

Account Purchase/Order History

What was purchased in the past?

How long was buying cycle for past opportunities in the account?

What was the value generated by the account in the past?

- Click **pre-defined questions** on the left in blue divided by different categories

*Pre-defined questions in grey have no underlying data to generate an answer

- Basic **account information** is provided on the right

- Type any question related to the Lead, then click **“Ask”** to generate an answer

Question

Ask

Lead Id	LEAD-0012390263
Classification	Cold
Customer Name	Boyan Kelchev
Email	boyan@hyperscience.com
Company	Hyper Labs, Inc.
Geo	North America
Country	United States
Status	Open
Closed Date	
Lead Owner	Jared Ribble
MDCP Org Id	1071721707
STID	551587755

Results

- Users can **provide feedback** if they agree or disagree with the generated answer
 - Users can also regenerate the answer by clicking the **regenerate** button if they feel it is incorrect
- If the AI continues to provide incorrect information, users can create a ticket by clicking on "No" and submit a form with additional details.

The screenshot shows a feedback form with the question "Is the result correct?" and two radio buttons: "Yes" and "No". The "No" button is selected. To the right of the form is a green "Create Ticket" button. Below this, a "Create Ticket" modal is open, featuring a text input field labeled "Issue Description" and two buttons at the bottom: "Cancel" and "Submit". A green arrow points from the "Create Ticket" button to the modal. A green box is visible in the bottom left corner of the slide.

What are any recent opportunities on the account both recently closed and open?

The account associated with marketing lead LEAD-0012390263 has one recent opportunity:

1. **Opportunity ID:** OPE-0016779766
- **Status:** Open
- **Stage:** 03 - Qualify the Opportunity
- **Type:** New Business
- **Channel Route:** Direct
- **Process Type:** Standard
- **Fulfillment Route:** HPE Fulfilled
- **Customer Engagement:** End User Sales
- **Internal Owner Email:** kevin.gildea@hpe.com
- **Create Date:** 05-Dec-2023
- **Close Date:** 28-Oct-2024
- **Product Type:** HPC & AI
- **Product Subtype:** HPC & AI
- **Business Unit:** High Performance Compute & AI Solutions
- **Total Estimated Value:** \$505,000.00

► Data Validation

Is the result correct? ☐ Yes ☐ No



Results

- If needed, click **“Data Validation”** to view the underlying data and SQL Query used to answer the question

Data Validation

SQL Query:

select * from hpcom_usr.src_genai_sdrsum_lead_other_account_opptydetail_simplified where hpe_lead_id='LEAD-0012390263' order by 1, 2, 15;

hpe_lead_id	lead_created_date	lead_closed_date	hpe_oppty_id	case_safe_id
LEAD-0012390263	2024-06-10 12:00 AM		OPE-0016779766	006Kh00000cQdI9IA

What are any recent opportunities on the account both recently closed and open?

The account associated with marketing lead LEAD-0012390263 has one recent opportunity:

- 1. **Opportunity ID:** OPE-0016779766
 - Status:** Open
 - Stage:** 03 - Qualify the Opportunity
 - Type:** New Business
 - Channel Route:** Direct
 - Process Type:** Standard
 - Fulfillment Route:** HPE Fulfilled
 - Customer Engagement:** End User Sales
 - Internal Owner Email:** kevin.gildea@hpe.com
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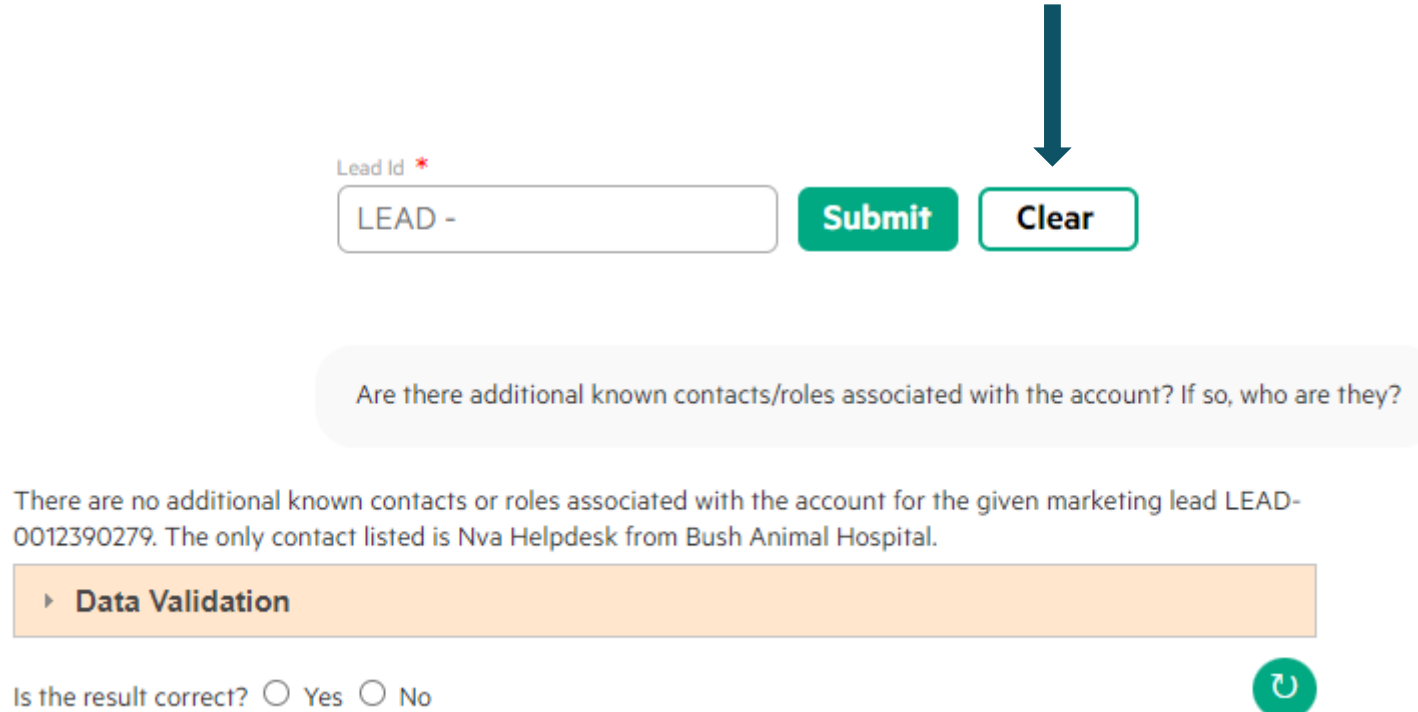
► Data Validation

Is the result correct? ☒ Yes ☐ No



Closing

- Click the **“Clear”** button to reset all results and return to the Main Page



The screenshot shows a web form interface. At the top, there is a text input field labeled 'Lead Id' with a red asterisk, containing the text 'LEAD -'. To the right of the input field are two green buttons: 'Submit' and 'Clear'. A large blue arrow points down to the 'Clear' button. Below the input field and buttons is a light gray rounded rectangle containing the text: 'Are there additional known contacts/roles associated with the account? If so, who are they?'. Below this is a text block stating: 'There are no additional known contacts or roles associated with the account for the given marketing lead LEAD-0012390279. The only contact listed is Nva Helpdesk from Bush Animal Hospital.' Below the text block is an orange bar with the text 'Data Validation'. At the bottom, there is a question 'Is the result correct?' followed by radio buttons for 'Yes' and 'No'. A green circular button with a refresh icon is located to the right of the radio buttons.

Lead Id *

LEAD -

Submit Clear

Are there additional known contacts/roles associated with the account? If so, who are they?

There are no additional known contacts or roles associated with the account for the given marketing lead LEAD-0012390279. The only contact listed is Nva Helpdesk from Bush Animal Hospital.

► Data Validation

Is the result correct? ☐ Yes ☐ No



Thank you

