When discussing this outline with a computer programmer who is building the chatbot, it's important to communicate your requirements clearly and methodically. Here's how you can refer to the outline effectively:

1. **Provide a Comprehensive Overview**: Begin by sharing the complete outline with the programmer. This can be done by forwarding the document or outline you have prepared, or by having a shared digital workspace where the outline is accessible.
2. **Explain the Chatbot's Purpose**: Clearly articulate the primary role of ELLOW Beta as a virtual Loan Officer specialized in asset-based residential investment and commercial loans. Emphasize its focus on Velocity Mortgage Capital’s specific products and policies.
3. **Detail the Information Gathering Strategy**: Highlight the importance of the chatbot asking no more than two pieces of information at a time. Explain how this approach is designed to prevent overwhelming the user and to keep the conversation focused and manageable.
4. **Discuss the Specific Data Points**: Go through each section of the outline, detailing the types of questions ELLOW Beta needs to ask. Explain why each data point is crucial for the loan evaluation process and how it relates to Velocity Mortgage Capital’s products.
5. **Outline the Decision-Making Logic**: Describe how the chatbot should process the information gathered to categorize the loan scenario into one of three outcomes. Clarify how it should guide the conversation based on these outcomes.
6. **Communication Strategies and Stages**: Explain the different stages of interaction (early, middle, ongoing conversations) and how the chatbot’s communication style should adapt at each stage.
7. **Lead Transfer Mechanism**: Discuss how ELLOW Beta should handle lead transfer to human counterparts, emphasizing the need for a seamless transition.
8. **Cross-Referencing with Policies**: Stress the importance of integrating Velocity Mortgage Capital’s Master Credit Policy and Rate Sheet into the chatbot’s logic for accurate loan scenario evaluation.
9. **Technical Requirements**: If there are specific technical requirements or constraints (like integration with existing systems, data privacy concerns, etc.), ensure these are communicated clearly.
10. **Feedback and Iterations**: Encourage an iterative development process, where the programmer builds a basic version first, which is then refined based on feedback and testing.
11. **User Interface Design**: If applicable, discuss how the chatbot’s interface should be designed for ease of use, especially in terms of how information is requested and presented to the user.
12. **Testing and Evaluation**: Plan for a testing phase where the chatbot is evaluated for accuracy, user-friendliness, and adherence to the outlined requirements.

By systematically going through these points, you can ensure that the programmer fully understands the scope and functionality of ELLOW Beta, leading to a more efficient development process and a chatbot that meets your specific needs.

User

**You**

retype as if giving this information directly to the programmer

ChatGPT

**ChatGPT**

Certainly! If you're addressing a programmer directly regarding the development of ELLOW Beta, the virtual Loan Officer chatbot for Velocity Mortgage Capital, you might say:

"Hello [Programmer's Name],

I'd like to discuss the development of a specialized chatbot, ELLOW Beta, designed for Velocity Mortgage Capital. This chatbot will function as a virtual Loan Officer, focusing on asset-based residential investment and commercial loans. Here are the key aspects and requirements for its development:

1. **Chatbot's Primary Role**: ELLOW Beta should specialize in asset-based loan products. It's crucial that it aligns with Velocity Mortgage Capital’s specific products and policies.
2. **Information Gathering Strategy**: The chatbot should ask no more than two pieces of information at a time from users. This approach is to ensure the conversation remains focused and doesn’t overwhelm the user.
3. **Specific Data Points**: ELLOW Beta needs to methodically collect data relevant to loan evaluation. This includes the transaction type, property details, borrower's financial status, and more. Each question should be purposeful and contribute to building a clear understanding of the client’s scenario.
4. **Decision-Making Logic**: The chatbot should categorize loan scenarios into one of three outcomes based on the information gathered. It needs to guide the conversation towards a conclusion that either offers preliminary loan terms, suggests further discussion with a human officer, or identifies a scenario as unlikely but still directs the client for human assistance.
5. **Communication Adaptation**: ELLOW Beta should have a dynamic communication style that adapts based on the interaction stage with the user - from initial probing to building rapport, and maintaining long-term relationships.
6. **Lead Transfer Mechanism**: It’s essential for the chatbot to smoothly transition leads to human counterparts. This could be through email or live chat transfers.
7. **Integration with Velocity’s Policies**: The chatbot must reference Velocity Mortgage Capital’s Master Credit Policy and Rate Sheet in its evaluations to ensure accuracy and compliance.
8. **Technical Requirements**: Please let me know if there are specific constraints we should consider, like integration with existing CRM systems or data privacy standards.
9. **Iterative Development**: I propose an iterative approach to the chatbot's development. We start with a basic version and refine it through feedback and testing phases.
10. **User Interface Considerations**: The UI should be user-friendly, especially in how it requests and displays information. The goal is to make the interaction as intuitive as possible.
11. **Testing and Evaluation**: We’ll need to plan a rigorous testing phase to ensure the chatbot's accuracy, user-friendliness, and adherence to our outlined requirements.

Your expertise in this development is crucial, and I’m looking forward to seeing how ELLOW Beta takes shape under your guidance. Please feel free to reach out if you have any questions or need further clarifications on any of these points.

Best regards, [Your Name]"