\*\*Good Morning, Everyone!\*\*

Today, we’ll be exploring the key features of SalesBuddy, a powerful AI tool designed to enhance our interactions and insights in financial services. During this demo, we’ll cover several standout capabilities including data lineage, auto-completion, multi-lingual support, speech input/output, feedback loop, and multi-modal capabilities. Additionally, we’ll see how SalesBuddy enforces critical guardrails to avoid forward-looking statements, refrains from offering investment advice or stock comments, and stays within the training scope. We’ll also discuss the security measures in place, like Access Control Lists (ACL), ensuring SalesBuddy is accessible only to authorized users. Moreover, we’re using India-based resources to comply with data localization requirements, ensuring that all private data remains within India.

**\*\*Demo Walkthrough:\*\***

Let’s dive into the demo. SalesBuddy features a responsive UI that adapts seamlessly to both mobile and web views, ensuring a consistent experience across devices. RMs can log in to SalesBuddy using their ID and Password. Upon logging in, we’ll land on the SalesBuddy homepage, where we’ll see various features:

**- \*\*Persona Selector:\*\*** Here’s the Persona button. This dropdown allows us to select the persona—Beginner, Intermediate, or Expert—based on the user's experience level. It tailors responses accordingly, simplifying terms for beginners or providing detailed explanations for experts.

**- \*\*Fund Name Filter:\*\*** Next to the Persona Selector, we’ll find the Fund Name Filter, which enables us to narrow down responses to specific funds or select all as per our needs.

\*\*Let’s ask a question:\*\* **"Can you please tell me a summary of HDFC Flexi Cap Fund?"**

As we type, SalesBuddy analyzes the input in real-time, predicting and suggesting the next words or phrases, which speeds up interaction and improves efficiency.

Once we submit the question, SalesBuddy ensures data lineage is maintained, tracing back to the original sources used for the summary. Additionally, RMs can view and download reference documents directly from the chat.

Along with the response, SalesBuddy offers follow-up questions based on the conversation context, guiding users towards next steps or related inquiries.

Below the response, you’ll notice the thumbs up/down buttons. RMs can provide feedback here, which helps enhance SalesBuddy’s performance over time, improving the quality and relevance of its responses.

We have two speed modes available in sales Buddy , Quick and Normal mode. Quick Mode provides fast answers within 2-5 seconds; Normal Mode offers in-depth responses for complex queries.

Now, let’s switch to \*\*Quick Mode\*\*. In Quick Mode, SalesBuddy delivers concise results in just 2-5 seconds. For more in-depth analysis, we can switch back to Normal Mode.

SalesBuddy also supports \*\***speech input and output**\*\*. This feature allows users to interact using voice commands and receive voice responses, making interactions more natural. Let’s try a voice command:

**\*\*Second Question:\*\* " What are the top holdings of HDFC Small Cap Fund?**

SalesBuddy will provide the response in both text and speech formats. We can click the audio button to hear the speech response. Notice it also indicates the recency of the data used in the response.

\*\*Fourth Question:\*\* "Compare HDFC Small Cap Fund with its benchmark performance over 1 year, 3 years, 5 years, and 10 years."

SalesBuddy supports multiple regional and global languages, allowing users to interact in their preferred language. Currently configured for English, French, Hindi, and German.Let’s ask a question in Hindi:

\*\*Question (Hindi):\*\* "इस फंडकी निवेश रणनीति क्या है?"

SalesBuddy automatically detects the language and seamlessly switches to provide the response in Hindi.

Let’s ask a question in French as well:

\*\*Question (French):\*\* "Quel est le nom du gérant du HDFC Flexi Cap Fund?"

Again, SalesBuddy switches to French and responds accordingly.

We’ve also enabled \*\*multi-modal capabilities\*\* in SalesBuddy. For this, we’ve added sample audio, video, and image files to demonstrate this feature. For instance:

\*\*Question:\*\* "What are the key factors affecting bond yields as discussed in the January 2022 market update?"

When RMs ask questions based on these sample files, SalesBuddy utilizes cognitive services to process the content and provide the extracted information. Here, you can see the response from the video file, with references to the exact time from which the answer was taken.

Finally, let’s test the guardrails. For example, asking an out-of-scope question:

\*\*Question:\*\* "Who is the Prime Minister of India?"

SalesBuddy politely declines to answer, ensuring the conversation remains focused on financial data.

It will also avoid providing any forward-looking statements or investment advice. For instance:

\*\*Question:\*\* "Can you tell me the future return of HDFC Flexi Cap Fund in 2028?"

SalesBuddy refrains from making such predictions, adhering strictly to the guidelines.

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