**UniSuper AI Demo Creation Guide**

This guide walks you through setting up the improved customer-focused UniSuper AI demo.

Prerequisites

* Python 3.8+ installed
* Visual Studio Code
* Claude API key (from Anthropic)

**Step 1: Create a Virtual Environment**

1. Open your command prompt or terminal
2. Navigate to your project folder
3. Create a virtual environment:

**Copy**

python -m venv venv

1. Activate the virtual environment:
   * Windows: venv\Scripts\activate
   * macOS/Linux: source venv/bin/activate

**Step 2: Install Required Packages**

With your virtual environment activated, install the required packages:

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pip install streamlit anthropic

**Step 3: Set Up Project Structure**

Create the following folders and files in your project directory:

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unisuper-demo/

├── app.py # Main application file

├── assets/

│ └── styles.css # Custom CSS styles

**Step 4: Add Code Files**

1. Copy the contents from the "Improved Customer-Focused UniSuper Demo (app.py)" artifact into your app.py file
2. Copy the contents from the "Custom CSS for UniSuper Experience (styles.css)" artifact into assets/styles.css

**Step 5: Set Your API Key (Choose One Method)**

Method A: Environment Variable (Recommended)

* Windows: set ANTHROPIC\_API\_KEY=your\_api\_key\_here
* macOS/Linux: export ANTHROPIC\_API\_KEY=your\_api\_key\_here

Method B: Input in Application

* You'll be prompted to enter your API key when you run the application

**Step 6: Run the Application**

With your virtual environment activated, run:

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streamlit run app.py

Your browser should open automatically with the UniSuper AI demo running.

**Step 7: Using the Demo**

* The default view shows only the customer-facing chat interface
* To access the technical view during your presentation, click the small gear icon (⚙️) in the bottom right corner
* When in technical mode, you'll see system actions, journey progress, and demo controls

Troubleshooting

* If you get an import error for Anthropic, make sure you've activated your virtual environment
* If the app doesn't connect to Claude, check that your API key is correct
* For styling issues, make sure the CSS file is in the correct location

Presentation Tips

1. Start in Customer Mode: Begin your presentation showing only the customer experience
2. Demo the Full Journey: Show how Natasha can update her address and then transition to investment advice
3. Technical Explanation: If technical questions arise, discreetly switch to tech mode to explain the architecture
4. Focus on Experience: Emphasize the conversational nature, personalization, and seamless experience

**Presentation Guide**

**Presentation Notes**: AI-Powered Customer Experience Transformation at UniSuper

**Introduction** (1-2 minutes)

**"Today I'm excited to show you how AI can transform the member experience at UniSuper. Rather than just talking about concepts, I've built a working demonstration of what this could look like from a member's perspective."**

**Demo Walkthrough** (5-8 minutes)

**Opening**

- Show the clean, UniSuper-branded interface

- Point out how it feels like a natural extension of your digital experience

- "This is Natasha's view when she logs into her member portal"

**Address Update Scenario**

1. Start with: "I need to update my address"

2. Note how the AI responds conversationally (not with forms or numbered lists)

3. Highlight how the AI:

- Asks for information in a natural way

- Confirms details with simple language

- Handles verification seamlessly

**Value-Added Cross-Sell**

1. After address update completes: "That's all done! Anything else I can help with today?"

2. Respond with: "Can you tell me about my investment options?"

3. Emphasize the personalized insights:

- References Natasha's actual performance (5.2%)

- Compares to peer group (6.8%)

- Makes contextual recommendations

**Appointment Booking**

1. Show how the AI offers specific appointment times

2. Select an option and note the confirmation

3. Highlight the multi-channel approach (chat + email confirmation)

**Business Benefits** (2-3 minutes)

"What you've just seen demonstrates several key benefits:"

1. \*\*Enhanced Member Experience\*\*

- Conversational, natural interactions

- No forms or complex navigation

- Single interface for multiple needs

2. \*\*Operational Efficiency\*\*

- Automation of routine administrative tasks

- Reduced call center volume

- Faster service resolution

3. \*\*Growth Opportunities\*\*

- Contextual cross-sell opportunities

- Data-driven personalization

- Improved conversion to advisory services

**Technical Insights** (Optional - 2 minutes)

If questions arise about how it works:

1. Discreetly activate tech mode (gear icon)

2. Show the architecture briefly

3. Explain the AI agent approach:

- Contact Management Agent handles address updates

- Investment Advisor Agent provides personalized insights

- Regulatory guardrails ensure compliance

**Closing** (1 minute)

"This demonstration shows how AI can transform routine transactions into opportunities for deeper engagement. Members get a better experience, while UniSuper benefits from operational efficiencies and growth opportunities.

The next step would be to develop a pilot focusing on high-volume service requests like the ones we've demonstrated today."

## Handling Questions

- \*\*On data security\*\*: "The solution would integrate with UniSuper's existing security infrastructure, with all sensitive operations requiring proper authentication."

- \*\*On implementation timeline\*\*: "We could have a pilot version focused on 2-3 specific member journeys within 8-12 weeks."

- \*\*On member adoption\*\*: "The conversational interface requires no learning curve - members interact as naturally as they would with a human representative."

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AI-generated content may be incorrect.

A screenshot of a phone

AI-generated content may be incorrect.

A screenshot of a phone

AI-generated content may be incorrect.

A screenshot of a phone number

AI-generated content may be incorrect.