

Use Case

Contoso's finance department manages a wide range of documents that fall into two main categories: process documents and compliance documents. Together, these documents capture how financial operations are conducted and ensure they adhere to legal and regulatory standards. However, the sheer volume and variety of these documents can make it challenging for staff to quickly find information when needed.

Expected Outcome

Contoso is looking to build an AI Chatbot for a smarter system to manage and interact with finance documents. **99% Accuracy of responses is critical**

Customer Pain Points:

- 1. Volume & Retrieval Difficulty:** With ever-growing stacks of documents, locating specific information is daunting. Traditional search methods are inefficient across multiple file types and storage locations. Common process documents include Step-by step guides, policy documents, flowcharts & checklist, forms.
- 2. Regulatory Complexity:** Navigating evolving regulations demands attention to detail, and manual methods are error-prone. Missing a critical update (like a new anti-fraud requirement) can have serious consequences.
- 3. Knowledge Silos:** Process knowledge might reside in separate manuals or even in senior employees' heads. New team members face steep learning curves onboarding to current procedures.
- 4. Keeping Documents Updated:** Ensuring everyone uses the latest version of a policy or form is difficult. If documentation isn't updated or communicated promptly, teams might follow outdated processes.

Scenario 1

Contoso has started design thinking process and provided the below diagram as a starting point for the architecture design kickoff meeting. They are debating whether to use GPT-4o or train own model?

