**Zeta Solutions Discovery Meeting Transcript**

*Date 1 Apr 2025 – Deeva Smart (Snowflake) with Joe Dollar, Tony Gambino, Brian Benz, Raymond Grey, Clare Tabs (Snowflake) & Sarah Chen, Ted M, Ted R, Brett P, Clint Wong (Zeta Solutions)*

00:00 Joe Dollar: Thanks everyone for hopping on. Quick roll-call: I'm Joe, AE on the account; Tony's our legal & contracts lead; Brian's our new AI/ML specialist; Raymond is AE for News Corp; Clare is Raymond's manager and runs our media vertical.

00:05 Deeva: I'll handle the Cortex AI overview and demo today.

00:07 Tony Gambino: From Zeta we have Sarah Chen—SVP Product, Ted M from contracts, Ted R VP Customer Analytics, Brett P VP Consumer Analytics, and Clint Wong SVP Data Science.

00:12 Sarah Chen: Our goal is natural-language analytics—business users shouldn't need schema knowledge. We've tested Cortex lightly but need a real use case and ROI story.

00:18 Deeva: Understood. I'll show how **Cortex AI** lets users ask, "Show average days-on-market for three-bed homes in Austin last quarter" and get results instantly. Structured listing tables plus unstructured market-trend text are analyzed together.

00:26 Brian Benz: We'll demo Llama 3 powering the NLQs; we can also swap in Mistral for cost or domain fit.

00:29 Ted R: Integration matters: can Cortex sit directly on our Snowflake data model, or do we need ETL?

00:32 Deeva: No ETL—Cortex operates on your existing Snowflake objects. We add a semantic model, then let the LLM translate plain language to SQL.

00:37 Brett P: How do we govern access? We've got neighborhood insights that only licensed agents see.

00:41 Deeva: Cortex respects Snowflake roles. If a rep doesn't have neighborhood-table access, the LLM won't surface that data.

00:45 Clint Wong: Performance? Users expect answers in seconds.

00:48 Deeva: Query latency is typically under five seconds for > 95 % of questions; we'll benchmark during the POC.

00:51 Clare Tabs: We need to flag that News Corp's new MSA is still in negotiation. It may change AI pricing terms. Until then, you can stay on the current MSA.

00:56 Tony Gambino: Good to know. We'll need cost clarity before execs approve.

01:00 Joe Dollar: Proposed meeting flow: high-level AI/ML on Snowflake, NLP demo, short success story, then pricing & enablement. Everyone agree?

01:04 Sarah Chen: Yes—please drop any off-topic slides. Stay laser-focused on NLQ and ROI.

01:07 Deeva: Will do. After the demo we'll validate use cases with Sarah, build a quick-start guide, and outline a 30-day pilot.

01:12 Raymond Grey: Our News Corp contract includes similar AI terms; we'll align pricing models.

01:15 Brian Benz: For the pilot we'll enable three sample queries, measure time-to-insight, and track user adoption.

01:18 Ted M: Sounds good. Timeline?

01:20 Deeva: We can run the pilot starting April 22. Week 1: semantic model & security. Week 2: NLQ enablement. Week 3–4: user testing and ROI capture.

01:25 Sarah Chen: Perfect. I'll gather sample datasets and success metrics.

01:28 Clare Tabs: Remember, final MSA updates may deliver better pricing—so we'll note cost TBD pending legal.

01:30 Joe Dollar: Action items: Snowflake trims deck; Zeta shares datasets & KPI goals; pilot kicks off April 22. Anything else?

01:34 Clint Wong: That covers it. Looking forward to the demo.

01:36 Deeva: Great. I'll send the revised slide-deck and pilot charter tomorrow. Thanks everyone!

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## What We Already Knew Before the Meeting

- **Company Overview** – Zeta Solutions: leading real-estate platform; property listings, market data, neighborhood insights, pro connections; mobile and web apps.

- **Use-Case Goal** – *Natural Language Analytics for Real Estate Insights* using Snowflake **Cortex AI** to let non-technical users query structured listing data and unstructured market trends via conversation.

- **Business Objectives** – democratize analytics, cut time-to-insight, streamline insight extraction, enable cross-department data access.

- **Pain Points** – limited insights for non-technical users, complex schema barrier, inefficient ad-hoc SQL, analysis bottlenecks.

- **Buyer & Influencer Titles** – Economic buyers: CTO, SVP Product, CDO, VP Analytics, CIO. Influencers: VPs Customer/Consumer Analytics, SVP Data Science, Data Engineers, BI managers, Product managers.

- **Decision Criteria (to confirm)** – natural-language quality, integration ease, cost, security/compliance, scalability, training/support.

- **Success Metrics (to confirm)** – user-adoption rate, query latency, analysis time saved, reduction in tech-team tickets, NLQ accuracy, ROI.

- **Competitive Landscape** – alternatives: Tableau/Power BI, custom NLP, AWS QuickSight, BigQuery ML, open-source frameworks.

- **Concerns** – ongoing MSA renegotiation with News Corp (could affect AI terms), need clear ROI, minimal prior Cortex usage.

- **Next‑Step Plan (pre‑agreed)** – present high‑level Cortex overview, NLQ demo, discuss enablement & cost, validate use cases with Sarah Chen, then craft quick‑start guide and pilot.