*Company names have been changed for anonymity purposes

AI Company Account Plan - ABC Company

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Status: Draft | `Current` | Needs update | Obsolete
Last updated: Nov 18, 2024

Problem Statement

Potential prospective customer for AI Company. Put together an account plan (in any format you like), including some examples of your planned outreach.

Market Analysis & Opportunity Definition

Industries are harnessing AI in innovative ways across 3 main Jobs-To-Be-Done. [source]

1. **Do it with me tasks:** These are tasks where AI assists a human user in completing a task. The AI acts as a co-pilot, providing suggestions, feedback, and automation to enhance the user's efficiency and creativity.
    a. **Automotives:** Uses AI to design vehicles, optimize manufacturing processes, and even develop self-driving car technology.
    b. **Financial Services:** In finance, AI automates tasks like data entry and report generation, analyzes market trends, and provides personalized financial advice

2. **Do it for me tasks:** These are tasks where AI autonomously completes a task on behalf of the user. The AI takes in a prompt or request and generates a complete output, such as writing an email, creating a marketing plan, or generating code.
    a. **Healthcare**: In healthcare, AI generates medical reports and analyzes complex medical data.
    b. **Real Estate**: In Real Estate, AI can automatically manage Property Listings.

3. **Find me answers:** These are tasks where AI searches for information and provides answers to user queries. This can involve factual information, data analysis, or complex problem-solving.
    a. **Customer Support**: AI-powered chatbots can quickly retrieve relevant information from vast knowledge bases to answer customer questions.
    b. **Legal**: AI can parse legal documents, contracts, or case law to provide concise answers about clauses, obligations, or precedents, saving time for lawyers and clients alike.

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Regardless of the industry and the use case, AI safety and evaluation tools like the staABC offered by PatronusAI, are needed to help clients identify vulnerabilities and optimize AI systems for security and accuracy using the following:

1. Accuracy of AI Models - Evaluations

- **Performance Assessment:** These models assess the accuracy, reliability, and fairness of AI models, ensuring they meet specific performance standards.
- **Bias Detection:** They identify and quantify biases within AI models, preventing discriminatory outcomes.
- **Robustness Testing:** They evaluate the resilience of AI models to adversarial attacks, ensuring they can handle unexpected inputs.

2. Security of AI models - Mitigation

- **Adversarial AttaABC Detection:** These models can identify and neutralize malicious attempts to manipulate AI systems.
- **Ethical Guidelines Enforcement:** They help ensure AI systems adhere to ethical principles and avoid harmful consequences.
- **Transparency and Explainability:** They provide insights into the decision-making processes of AI models, enhancing trust and accountability

One such industry that heavily relies on data accuracy and security is the Finance industry. Currently, FinTech companies that strive to provide users with personalized financial advice (doing the job of a traditional financial advisor, but autonomously through GenAI), are really grappling with how to evaluate their products at scale. **ABC Company** seems to be leading that conversation.

Next, I'll be discussing what an account plan for ABC Company would look like.

Account Plan

Prospect Overview

I chose ABC Company as a prospective client for AI Company because of a recent personal experience. After financing a new car, I noticed a drop in my credit score. I relied on ABC Company's tools and insights to monitor the changes and take steps to improve it. This firsthand experience highlighted how crucial their platform is for users managing financial health, and it sparked ideas on how AI Company's solutions could enhance their offerings, particularly in delivering more secure and insightful LLM-driven recommendations.

ABC Company is a leading personal finance platform, serving 1 in 3 Americans with a total membership base of over 140 million. Each month, 40 million users actively log in to manage their financial health. Among these, an estimated 10% interact with Intuit Assist, ABC Company's digital financial assistant, translating to 4 million regular users generating millions of LLM-driven outputs. With 100s of personalized data points per member, ABC Company faces the critical challenge of ensuring accurate, reliable insights while safeguarding sensitive user information, making the need for robust security and risk management essential. [source]

That's where we, AI Company, come in.
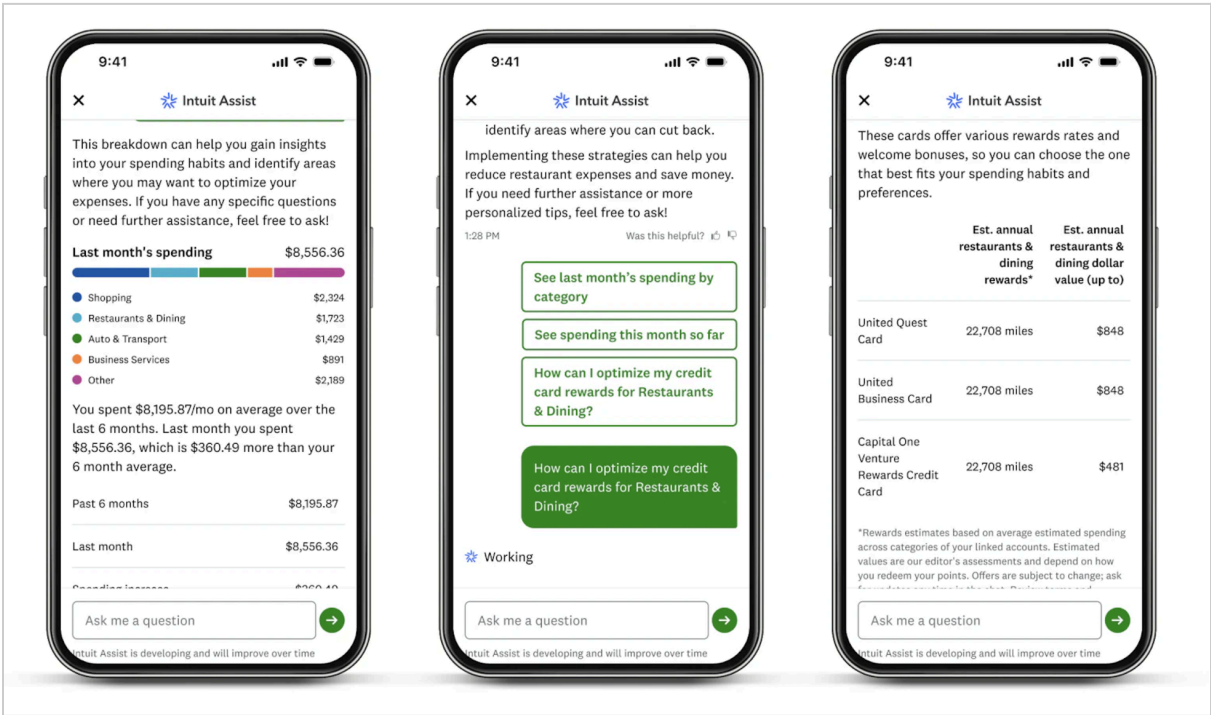
Challenges & Solutions Mapping
ABC is focusing on 3 main things:

JTBD	Target Audience	Pain Points	AI Company Solutions
Do it with me AI powered assistant that provides personalized recommendations to help members manage their credit, debt, and spend	ABC's 40M monthly active users.	**Hallucinations:** When offering financial assistance, LLM inaccurately describes ABC's services to the member. E.g. "Improve your scores with ABC	Lynx: Hallucination Detection Model ● Real-time detection: Lynx can identify hallucinations as they occur, allowing for immediate correction or prevention.

		Boost" when product doesn't exist.	● Advanced reasoning: It can handle complex, real-world scenarios, making it highly effective in various applications. ● Improved accuracy: Lynx outperforms other models in detecting hallucinations, ensuring more reliable AI outputs. Benchmarking Evaluator: ● By benchmarking models, it helps identify areas where improvements are needed to reduce hallucinations
Do it for me An assistant that helps ABC members file their taxes	ABC's members that are looking to file their taxes.	**Inconsistent Input/Output Guardrails:** ABC would like to sanitize certain responses to omit investment related advice due to legal reasons. However, their internal eval system doesn't always catch the instances.	LLM Failure Monitoring & Observability: ● Continuous monitoring tools can track patterns in inputs and outputs, flagging anomalies or deviations from acceptable ranges in real-time.
Find me answers An LLM that ABC's customer support agents use to respond to customer queries and cases.	ABC's customer support agents, helping out ABC members with their financial questions.	**Math & Logic Errors:** When a member asks about their current credit card utilization, the LLM misrepresents the data e.g. says that 5% CCU is higher than 30% CCU.	Context Sufficiency Eval: ● Assess context efficiency by analyzing the relationship between the prompt, the provided context, and the generated response. Training Data Sets: ● Training LLMs on large datasets of correct mathematical and logical reasoning can improve their accuracy.

			Source: PatronusAI Intro DeABC

Outreach Strategy

Key Stakeholders

Name	Function	DACI (Driver, Approver, Contributor, Informed)
Bhavin Shah	AI/ML Product Leader	Approver
Sandeep Nain	CISO	Approver
Scott Mangles	AI General Counsel	Approver
Jazmin Morelos	GenAI Eng TPM	Contributor
Samantha Villauz	Staff Product Manager	Driver
Ryan Graciano	CPO	Informed

Email 1: Introduction and Value Proposition

Subject Line: Enhancing AI Accuracy and Compliance at ABC Company

Hi Bhavin,

I hope you're well! I'm reaching out from AI Company, where we specialize in helping companies like ABC Company enhance the accuracy and reliability of their AI models. With AI becoming a critical part of financial decision-making, we understand the importance of maintaining high standards in accuracy and compliance—especially when it comes to user trust and regulatory needs.

At Patronus, we've developed evaluation tools that align AI outputs closely with human expectations, reducing hallucinations by up to 90%. Given ABC Company's commitment to providing users with reliable financial insights, I'd love to discuss how our solutions can help ensure model accuracy and mitigate potential compliance risks as your AI models scale.

Would you be open to a brief call next week?

Best regards,Vikram MalhotraBDR, AI Company

Email 2: Specific Use Cases and Integration

Subject Line: How AI Company Enhances AI Models for Financial Insights

Hi Bhavin,

Following up on my previous email, I wanted to share a bit more about how we help organizations like yours. AI Company integrates seamlessly with platforms like OpenAI, AWS, and DatabriABCs to evaluate and improve LLMs used in sensitive applications. This could directly benefit ABC Company by:
- Reducing Model Hallucinations: Our tools identify and mitigate inaccuracies, ensuring users receive dependable financial recommendations.
- Enhanced Compliance: We help companies in highly regulated industries monitor and report on model reliability to meet regulatory standards.
- Real-Time Monitoring: Our real-time API supports continuous assessment, so models stay accurate as they evolve.

I'd love to dive into these use cases to explore how they could apply to ABC Company's AI strategy. Could we schedule a time for a brief demo?

Thanks again,Vikram MalhotraBDR, AI Company

Email 3: Case Studies and Social Proof

Subject Line: See How Industry Leaders are Reducing AI Risks

Hi Bhavin,

I wanted to share a few examples of companies in finance and tech sectors who have benefited from our model evaluation tools. Organizations like [Example Company] have seen a significant reduction in AI output errors and improved compliance with data regulations.

At Patronus, we're focused on helping companies protect user trust by enhancing model accuracy. I'd be happy to share a case study or discuss how our tools can support ABC Company's AI initiatives as they expand.

Please let me know if there's a convenient time to connect!

Best,Vikram MalhotraBDR, AI Company

Email 4: Final CheABC-In and Offering Resources

Subject Line: QuiABC CheABC-In: Supporting ABC Company's AI Models

Hi Bhavin,

Just checking in one last time to see if there's any interest in exploring how AI Company could support ABC Company's AI and ML efforts. We understand the unique challenges of deploying AI in finance, especially when it comes to compliance and accuracy.

I'd be happy to send over some additional resources or arrange a brief call if that would be helpful. Please feel free to reach out anytime!

Thank you,Vikram MalhotraBDR, AI Company

Email 1: Introduction and Value Proposition

Subject Line: Enhancing AI Security and Accuracy at ABC Company

Hi Sandeep,

I hope this message finds you well. I'm [Your Name] from AI Company, and I wanted to reach out regarding a topic that's critical for cybersecurity leaders like yourself—ensuring the integrity and security of AI systems in financial services.

As AI becomes integral to financial tools, addressing the risks associated with hallucinations, data privacy, and regulatory compliance is more critical than ever. At Patronus, we've developed solutions that:

Reduce AI Risks: Identify and mitigate inaccuracies and hallucinations in AI outputs, ensuring reliable results for your users.
Enhance Compliance: Support adherence to regulations like GDPR and CCPA by embedding transparency and accountability in AI workflows.
Monitor AI Systems in Real-Time: Deliver ongoing oversight to ensure models evolve securely without introducing new vulnerabilities.
I'd love the opportunity to share how we're helping companies in financial services enhance AI security. Would you have 15 minutes next week for a quick call?

Best regards, Vikram Malhotra BDR, AI Company

Email 2: Specific Use Cases and Integration

Subject Line: How AI Company Safeguards AI in Financial Services

Hi Sandeep,

I wanted to follow up on my previous message to share a bit more about AI Company's work. Our tools are designed specifically for organizations like ABC Company that leverage AI for critical decision-making while managing sensitive user data.

For example, we recently worked with a financial institution to:

- **Enhance Trust in AI Models**: Reduced output errors and ensured compliance with industry standards.
- **Streamline Audits**: Provided tools for auditing AI models to meet regulatory requirements without disrupting operations.
- **Prevent Model Drift**: Maintained model integrity through continuous real-time assessments.

Could we explore how these solutions might address challenges in scaling secure AI systems at ABC Company? Let me know a time that works for you.

Best,
Vikram Malhotra BDR, AI Company

Email 3: Social Proof and Case Study Offer

Subject Line: Proven AI Solutions for Cybersecurity Challenges

Hi Sandeep,

Did you know that over 70% of companies in financial services cite AI governance and security as their top priorities? At AI Company, we help companies overcome these challenges while ensuring accuracy, compliance, and user trust.

We've recently helped [Similar Company] reduce AI inaccuracies by 90% while maintaining strict adherence to privacy laws like GDPR. I'd be happy to share a case study or discuss how similar solutions could benefit ABC Company.

Would next week work for a 15-minute conversation?

Looking forward to connecting,
Vikram Malhotra BDR, AI Company

Email 4: Final Touch and Resources

Subject Line: Supporting Secure AI Adoption at ABC Company

Hi Sandeep,

I'm following up one last time to see if you'd be open to a quick chat about AI Company's solutions. Our tools are designed to help cybersecurity leaders like you manage the unique challenges of integrating AI in sensitive areas.

If you're not ready to connect, I'd be happy to send over some resources about how we've helped other companies in financial services mitigate AI risks and maintain compliance. Let me know how I can best assist!

Thank you,
Vikram Malhotra BDR, AI Company

Email 1: Introduction and Value Proposition

Subject Line: Building Reliable AI-Driven Products at ABC Company

Hi Samantha,

I hope you're doing well! I'm [Your Name] from AI Company, and I'm reaching out to discuss how we can support your product team in creating more reliable AI-driven user experiences.

With AI being a key driver for personalized financial insights at ABC Company, ensuring accuracy and user trust is essential. AI Company specializes in improving the reliability of large language models (LLMs) by:

- **Reducing Errors and Hallucinations**: Ensuring users receive accurate, actionable information.
- **Improving Trust in AI Recommendations**: Aligning outputs with user expectations to drive engagement.
- **Seamless Integration**: Compatible with tools like OpenAI, AWS, and DatabriABCs, making adoption effortless.

Would you be open to a quick call next week to discuss how AI Company could help enhance ABC Company's product offerings?

Best regards,
Vikram Malhotra BDR, AI Company

Email 2: Specific Use Cases and Product Relevance

Subject Line: Supporting Product Excellence with AI Accuracy

Hi Samantha,

Following up on my previous message, I wanted to share how AI Company can help product leaders like you. We've worked with product teams across industries to:

- **Reduce Customer Frustration**: Our tools eliminate inaccurate AI responses that can erode trust.
- **Optimize Development Cycles**: By identifying model weaknesses early, we accelerate the refinement of AI-driven products.
- **Boost Key Metrics**: Companies have seen higher NPS and customer retention after using AI Company's evaluation tools.

For a company like ABC Company, where user trust in financial insights is paramount, our solutions could ensure that AI models deliver consistent and reliable experiences. I'd love to schedule a call to dive deeper into these use cases.

Best,
Vikram Malhotra BDR, AI Company

Email 3: Data-Driven Results and Social Proof

Subject Line: How Leading Teams Improve AI Reliability

Hi Samantha,

I wanted to share a quick success story from a recent collaboration. A product team at [Example Company] used AI Company to reduce hallucinations in their LLM outputs by 90%, resulting in a 20% increase in user trust and engagement metrics.

For ABC Company's product initiatives, especially those leveraging AI for customer-facing tools, our evaluation and monitoring solutions could help ensure both accuracy and user satisfaction.

Would it be helpful to share more details or set up a quick chat next week?

Looking forward to connecting,
Vikram Malhotra BDR, AI Company

Email 4: Final Touchpoint and Offering Resources

Subject Line: Resources for Reliable AI in Product Development

Hi Samantha,

Just checking in to see if there's any interest in exploring how AI Company can support ABC Company's product goals. Our tools have helped companies enhance the reliability of their AI-driven products, resulting in stronger user engagement and trust.

If you're not ready for a call, I'd be happy to share some resources or a case study demonstrating how our solutions can fit seamlessly into your workflow.

Let me know how I can assist!

Thank you,
Vikram Malhotra BDR, AI Company

Cold Calling Script

BDR: Hi Bhavin, this is Vikram Malhotra calling from AI Company. Did I catch you at a good time? *(If they say yes, proceed. If they say no, politely ask for a better time to call.)*

Prospect: yes.
Or
Prospect: no, what is this about?

BDR: Great! I'll keep this quick. I'm reaching out because AI Company specializes in optimizing generative AI systems to ensure accurate, reliable, and compliant outputs.

I understand that ABC Company has been leveraging generative AI to enhance user experiences in financial insights. Our solutions can help your team:

- **Reduce Hallucinations**: By ensuring your models produce accurate and contextually reliable outputs.
- **Streamline Compliance**: Supporting data privacy regulations like GDPR and CCPA, critical in financial services.
- **Improve User Trust**: Ensuring your AI-generated insights are consistently aligned with user expectations.

Let me give you a concrete example! Say that one of your members is trying to understand recent changes to their credit report and your financial assistant is answering questions about it. How can you be sure the assistant will cite the right data and provide reasonable recommendations? These are just some of the things we at AI Company have targeted solutions for.

Does this sound relevant to what your team is working on?

Prospect: *expresses interest.

BDR: ask questions to better understand their needs.
- How is your team currently evaluating the accuracy of your generative AI models?
- What challenges have you faced in ensuring AI outputs meet compliance and user expectations?
- Are you currently using any tools to monitor or evaluate large language model (LLM) outputs at scale?

Prospect: *provides more detail

BDR: Thanks for sharing that! Based on what you've mentioned, I think AI Company could be a great fit. For example, we've helped teams using generative AI platforms like OpenAI and AWS reduce inaccuracies by up to 90%, while also providing tools to monitor outputs in real time to ensure compliance.

Would you be open to a 15-minute call next week to discuss how we can support ABC Company's Gen AI initiatives?

Objections Handling

Objections	Solutions
"We already have a system in place."	"That's great to hear! Many of our clients had

	similar setups but found value in how AI Company complements existing workflows by offering deeper evaluation metrics and real-time monitoring. Could we set up a quick demo to show how it might enhance your current process?"
"I'm not the right person for this."	"I appreciate that. Would you be able to point me toward the person who oversees generative AI model evaluation or compliance?"
"We deal with sensitive information (PII), we can't afford any data breaches/leaks, so we prefer to use our proprietary Evaluation method."	"Totally understand your concerns. AI Company works with anonymized data to ensure privacy while complementing your proprietary methods by identifying blind spots. Open to a quick chat?"

BDR: Thanks for your time, Bhavin. I'll send over some additional details right away. What's a good time to connect?

Prospect: x date

BDR: Great, I'll set up the meeting and you should see a calendar invite for x date in your email shortly! Thanks for connecting, Have a great day!

(If they agreed to a meeting, confirm the time before hanging up.)

Other forms of outreach: Social Media, Social Events

Goals & Metrics

Funnel	Goals	Metrics *Success measurement*
TOF - Activity Metrics	Lead generation	**Calls made:** TraABCs the number of outbound calls made per day or week. **Emails sent:** Measures the number of emails sent to potential clients.

		Meetings booked: Counts the number of meetings scheduled with prospects. **Social media interactions**: TraABCs engagement on social media platforms.
Pipeline Metrics	Nurture leads into opportunities	**Qualified leads generated:** Measures the number of leads generated that meet specific criteria. **Pipeline value:** TraABCs the total potential revenue of deals in the sales pipeline. **Conversion rate:** Measures the percentage of leads that convert to opportunities.
Sales Metrics		**Revenue generated:** TraABCs the total revenue brought in by the BDR. **Deals closed:** Measures the number of deals closed by the BDR. **Average deal size:** Measures the average value of closed deals. **Customer acquisition cost (CAC):** Measures the cost of acquiring a new customer. **Customer satisfaction:** Measures customer satisfaction with the BDR's services. **Time to close:** TraABCs the average time it takes to close a deal. **Sales cycle length:** Measures the average length of the sales cycle.