Renub Research Assignment

SalesGPT: Automated Sales Agent Documentation

Overview

The SalesGPT project is an automated sales agent built to assist sales representatives in conducting effective conversations with potential customers. It is designed to progress through various conversation stages, providing responses based on the given conversation history.

Getting Started

Prerequisites

Before running the SalesGPT code, make sure you have the following prerequisites installed:

- Python 3.x
- MongoDB installed and running locally

Setup

1. Clone the SalesGPT repository:

```
git clone https://github.com/your_username/SalesGPT.git
cd SalesGPT
```

2. Install dependencies using pip:

```
pip install -r requirements.txt
```

3. Insert **OpenAI API** Key

4. Set up MongoDB:

   - **Install MongoDB:**

- Download and install MongoDB from <u>MongoDB Official Website</u>.

- **Run MongoDB Locally:**

  - Start MongoDB as a background service using MongoDBCompass(GUI for MongoDB) or using the command:

    ```
    mongod
    ```

- **Configure MongoDB Connection:**

  - Open the `Renub.py` file in a text editor.

  - Locate the `save_customer_info` method in the `SalesGPT` class.

  - Update the MongoDB connection details, replacing `<YourLocalHost>` with your MongoDB server address (usually `localhost` if running locally).

    ```
    client = pymongo.MongoClient("mongodb://<YourLocalHost>:27017/")
    ```

5. Run the SalesGPT code:

   ```
   python Renub.py
   ```

Usage

Conversation Stages

The SalesGPT progresses through different conversation stages. Each stage is associated with specific actions and prompts.

- **Introduction (Stage 1):**

  - Start the conversation by introducing yourself and your company.

  - Be polite and respectful, keeping a professional tone.

- **Qualification (Stage 2):**

  - Confirm if the prospect is the right person for your product/service.

- Ensure they have the authority to make purchasing decisions.
- **Value Proposition (Stage 3):**
  - Briefly explain how your product/service can benefit the prospect.
  - Focus on unique selling points and value proposition.
- **Needs Analysis (Stage 4):**
  - Ask open-ended questions to uncover the prospect's needs and pain points.
- **Solution Presentation (Stage 5):**
  - Based on the prospect's needs, present your product/service as the solution.
- **Objection Handling (Stage 6):**
  - Address any objections the prospect may have.
  - Provide evidence or testimonials to support your claims.
- **Close (Stage 7):**
  - Ask for the sale by proposing a next step.
  - Summarize the discussion and reiterate the benefits.

Human Interaction

- Respond to AI-generated messages to progress through conversation stages.
- Input "check availability" to inquire about product availability.
- Input "goodbye" to end the conversation.

Check Product Availability

- If prompted to check availability, enter the product ID when prompted.

Saving Customer Information

- When the prospect expresses interest, the SalesGPT prompts for customer information.
- The data is saved to MongoDB, and the customer's unique ID is printed.

Customization

JSON File

- The project uses a JSON file (`test.json`) to simulate product availability.

- Customize the file with your product information.

MongoDB

- Update the MongoDB connection details in the `save_customer_info` method.

Example

```
Vishal Pahuja:  Hello! This is Vishal Pahuja from PureFlow RO Solutions. I hope you're
doing well. I'm reaching out to discuss your water purification needs and to introduce
our advanced RO water solutions. How can I assist you today?

User Input =>  Hi, i was looking for water purifier.
ChatGPT
Vishal Pahuja: Great to hear! Finding the right water purifier is crucial for ensuring
clean and safe drinking water. To assist you better, could you please provide some
additional information?

What specific features are you looking for in a water purifier?
Do you have any preferences regarding the type of water purification technology?
Is there a particular brand or model you've been considering?
How many people are there in your household, and what is your daily water consumption?
...
```

Conclusion

The SalesGPT project provides a framework for automating sales conversations, guiding users through key stages. It can be customized to fit specific business needs.