# MICHIGAN STATE UNIVERSITY Alpha Presentation Shareholder Engagement Chatbot

#### The Capstone Experience

#### **Team Ally**

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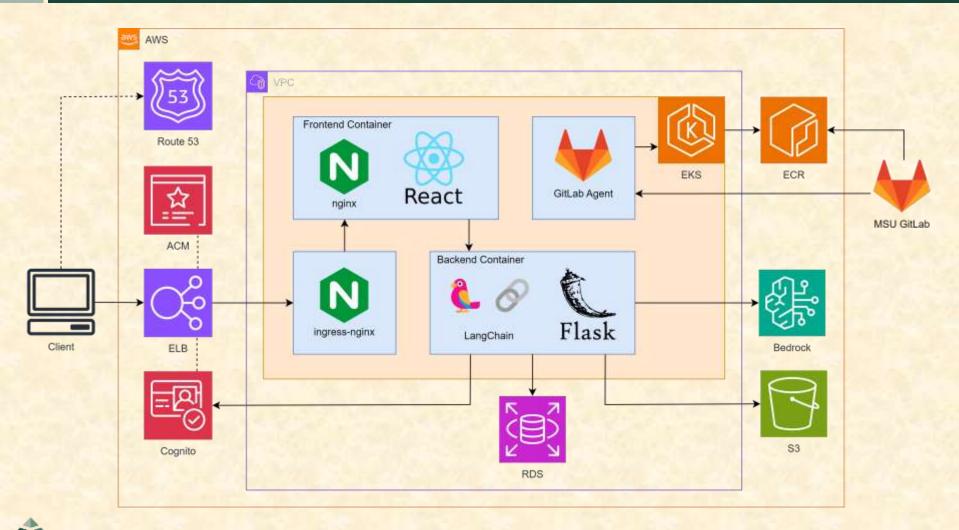


From Students... ...to Professionals

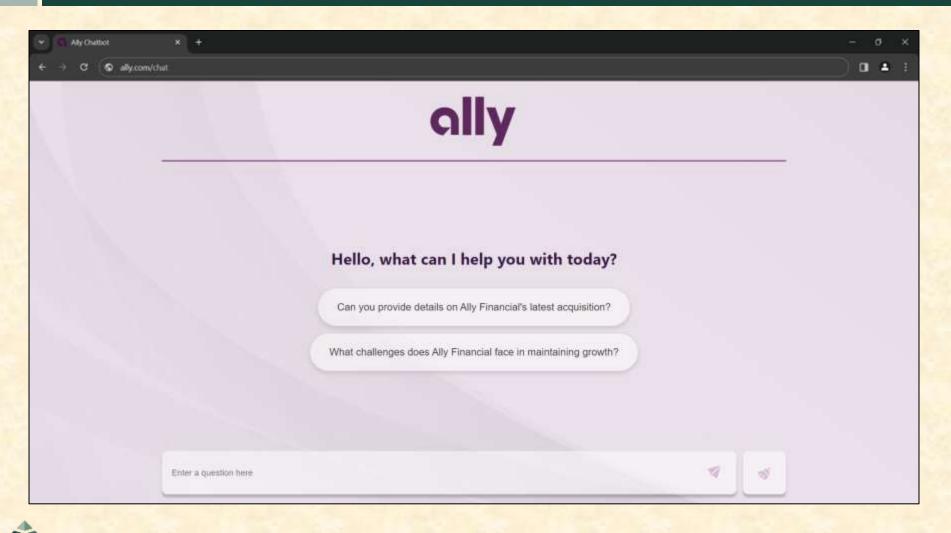
#### **Project Overview**

- Context-aware chatbot
- Based on Ally's public filings
- Provides source citations
- Protects private information
- Improves investor relations
- Facilitates information access

## System Architecture



### **Initial Chatbot Screen**



The Capstone Experience

## **Mobile View and Citations**

	all	y	
Hello, What quarter?	was Ally's ne	t income last	
		Sent 2 m	inutes a
	inancial repo for the last qu	ted a net inco Jarter. <sup>1</sup>	ime of
<sup>1</sup> Ally Financi	ial: Q4 Earning	s Snapshot	
	What abou	rt their full-yea	r EPS?
		Sent 17	ninute a
Ally reporte \$2.98 for th		r share (EPS)	af
<sup>2</sup> Ally Financi Q4 2023 Ean		Posts Full-Year	and
			nk youl st <i>just</i> n
	ome! If you ha leel free to asl	we any more	- pase in
nter a question	n bere	-11	3

# Staying on Topic

→ C S alyce	om/chat		
	ally		
		Who is the president of the US? Sent 2 minutes ago	
	I'm afraid I don't have information about the current US president. As an AI assistant focused on Ally Financial, I don't have access to that level of general world knowledge. Please feel free to ask me any questions related to Ally Financial specifically.		

### **Admin Panel**

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€ → C (S ally.com/chut			
Admin Panel	< Close	ally	
Filename	Browse file		
Title			
URL			
7	Discard	ello, what can I help you with today? /hat are Ally Financial's targets for loan and lease growth? /hat are the latest SEC filings available for Ally Financial?	
		7	4

#### What's left to do?

- Transition to AWS RDS
- Deploy to EKS
- Implement authentication
- Improve prompt engineering
- Add functionality to admin panel
- Automate data collection (stretch goal)
- Fine-tune the model (stretch goal)
- Implement FAQ feature (stretch goal)

#### **Questions?**

