# **MICHIGAN STATE** UNIVERSITY **Beta Presentation** Shareholder Engagement Chatbot The Capstone Experience

#### **Team Ally**

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Department of Computer Science and Engineering **Michigan State University** Spring 2024



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**



## **Mobile View and Citations**

C	ally	
Hello, What was / quarter?	Ally's net income	last
	Se	nt 2 minutes a
Hello! Ally Financ \$76 million for th		t income of
Ally Financial: Q4	Earnings Snapsh	at
W	hat about their fu	Il-year EPS7
	S	ent 1 mioute a
Ally reported earr \$2.98 for the full		EPS) of
<sup>2</sup> Ally Financial Inc. Q4 2023 Earnings	(ALLY) Posts Full	-Year and
		Thank you Sent just n
You're welcome! I questions, feel fre		nore
vter a question here	-	

## **Staying on Topic**



## **Admin Panel**

<ul> <li>Ally Chatbot x +</li> <li>← → C (  ally conv/chat</li> </ul>				- ø ×
Admin Panel	¢ Close	ally		
Filename	Browse file			
Title				
URL				
mm/dd/yyyy				
Carried	Uproad	ello, what can I help you with today?		
Uploaded Files		s the expected timeline for the appointment of Ally's new CEO?		
Sort by: Last Modified V Most Recei	nt	Why did Ally decide to sell Ally Lending?		
Ally - A Few Things You Should Know				
Ally Financial Inc. 4Q 2023 Earnings Re	/iew			
Ally 4Q 2023 Financial Supplement			4 4	
Ally Financial (ALLY) Q4 2023 Earnings Call 1	ranscript.			

#### What's left to do?

- Stretch Goals
  - Model fine-tuning/further prompt engineering
  - Automated data collection
  - Conversation history
  - FAQ feature
- Other Tasks
  - Admin panel UI improvements
  - Messaging UI/UX improvements
    - Text streaming
    - Markdown support

#### **Questions?**

