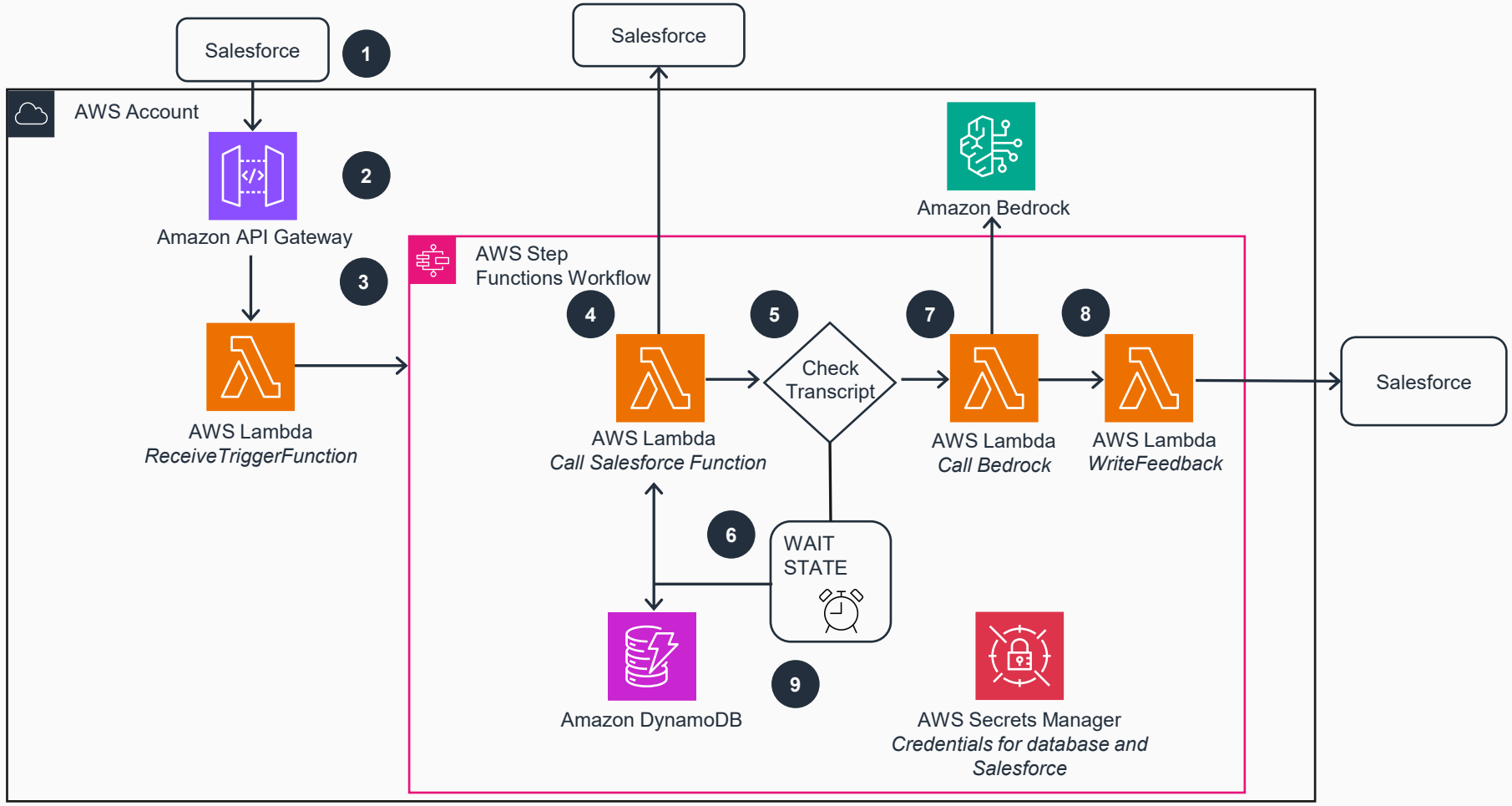
Guidance for Internal Sales Consultant Performance Analysis using Generative AI on AWS

This architecture diagram shows end-to-end architecture flow to enhance sales performance by analyzing ISC/ISR interactions with potential customers through near real-time call feedback, scoring, and recommendations that can be integrated with CRM systems.



1. Salesforce triggers the API hosted on **Amazon API Gateway** to initiate the performance review flow when a customer call ends.
2. **Amazon API Gateway** receives initial triggers/requests from Salesforce. An **AWS Lambda** function validates the Salesforce outbound message object and acknowledges the call with 200 OK.
3. The ReceiveTriggerFunction **AWS Lambda** function initiates the workflow when it receives new interaction data.
4. **AWS Step Functions** orchestrates the workflow. The CallSalesforce **AWS Lambda** function retrieves transcript data, customer notes, and past context from Salesforce via an API.
5. A "Check Transcript" decision point determines if the transcript is ready for analysis.
6. The system enters a WAIT STATE if the transcript is not ready.
7. When ready, the CallBedrock **AWS Lambda** function leverages the fully managed **Amazon Bedrock** service for generative AI-powered analysis of ISC interactions leveraging prompt engineering patterns. The foundation model will consider the customer context, history, and conversation, adhering to data privacy requirements to generate performance score, explanation, and constructive feedback while maintaining customer data.
8. The WriteFeedback **AWS Lambda** function processes the analysis results and generates structured feedback. It sends this feedback back to Salesforce via an API, which displays it as a banner or pop-up for the ISR within seconds..
9. **Amazon DynamoDB** maintains status tracking throughout the entire process for debugging and auditing purposes. **AWS Secrets Manager** stores credentials for **Amazon DynamoDB** and Salesforce access.

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AWS Reference Architecture