Rieda edishan | 2026-11-20

Practical AI fi sales inna financial services

Harbour Think Tank, Caribbean AI Association, under the leadership of Adrian Dunkley | 2026-11-11

Shaata edishan fi riida. Harbour Think Tank, Caribbean AI Association, anda Prezident Adrian Dunkley. Oktoba 2026. Revision 11 November 2026.

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Weh di test fi cover

Test approved comparisons, proposal assembly an pipeline evidence internally. Keep request, permitted offer, supported terms an approval owner apart. Confirm opt-out an consent before making contact lists.

Ten use case fi test

01. Route enquiries by di approved rule. If product or jurisdiction missing, ask one question. Sales staff confirm route an check correct against incorrect routing by queue.

02. Compare product facts on di same currency, period an fee basis. Cite every cell. Second reviewer check material differences are easy to see.

03. Proposal. Assemble approved current components an required documents. Manager compare wid a complete reference pack, check numbers an approve di version.

04. Pipeline. Check stage an duplicates against evidence. Seed known errors ina checked extract. Count misses apart from false flags an log corrections.

05. Requested call. Prepare approved product facts an unanswered questions. Compare wid reviewer’s brief. Count unsupported claims an missed questions.

06. Objection practice. Rehearse without pressure an respect a refusal. Training lead assess a later conversation without di assistant, including proper escalation.

07. Marketing pre-check. Link each claim to evidence an show di qualification just as clearly. Compliance test known defects an retain final approval.

08. Newsletter audience. Apply opt-outs first. Test consent and conflicting sample records. Marketing data owner approve di audience before any send.

09. Lost opportunity. Code recorded reasons only an keep unknowns separate. Two reviewers compare classifications without guessing personal motives.

10. Sales handover. Give di authorised team request, agreed terms an evidence. Receiver check each required item an return incomplete packs. Count returns.

Di 90-day test

Day 1–15: pick one task. Name di owner an who can stop di test. Write down di approved source, access, time an error inna di work now. Day 16–45: test hard case an record weh disagree. Check every output an keep di test separate from live work.

Day 46–75: compare like task wid like task. Count di time fi prepare, check an fix. Day 76–90: look pon di serious error dem an decide fi widen, change or stop. Di think tank propose di workflow an priority dem. Dem never measure result from a company rollout. Di full English paper give di process, duty table, checks an source notes.

Suos dem

[1] Caribbean AI Association. Think Tanks. Harbour programme remit. Accessed 26 October 2026.

[2] Financial Services Commission, Jamaica. 2020. Market Conduct Guidelines for Securities Dealers. SR-GUID-20/01-0026, 31 January. Sections 6.5, 8 and 10.

[3] Bank of Jamaica. The Banking Services (Deposit Taking Institutions) (Customer Related Matters) Code of Conduct, 2016. Article 8, gazette pages 476E–476G.

[4] Office of the Information Commissioner, Jamaica. Data Protection Standards. Accessed 26 October 2026.

[5] Agent Skills. Agent Skills Overview. Accessed 10 November 2026.

Dis short edishan go wid di full orijinal ina Inglish.

Inglish edishan (PDF)