

A blue speech bubble containing the text 'citizens advice' in white lowercase letters.

citizens
advice

Caddy: AI adviser copilot



What is Caddy

A Generative AI LLM powered bot

- Only uses trusted sources
- Aim is to provide quicker answers to clients
- Help build adviser confidence
- Reduce demands on supervisor
- Role is to support advisers **not** an attempt to replace them



How Caddy works



Clients only ever interact with an adviser



Adviser asked Caddy the query they are unsure on



Caddy processes the request using Advisernet & Gov.UK

Presents the answer with sources to **Supervisors**



Supervisors Reviews the response adding additional comments if required

Human in the loop process



Clients only ever interact with an adviser



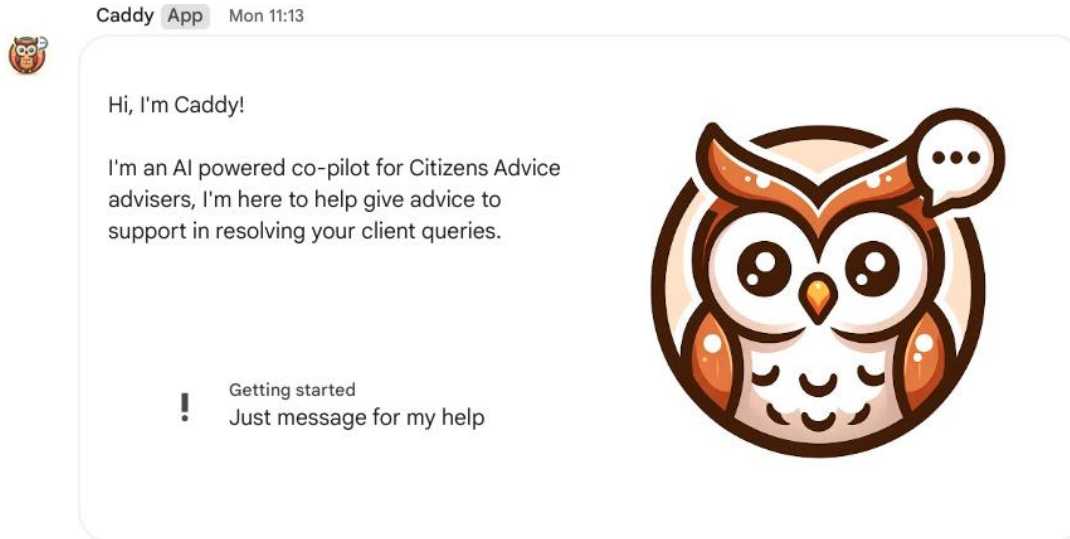
Adviser can confidently pass on this information now to the client



Supervisors
Validated response are then returned to the adviser

How do you use it

Once installed into your office simply @Caddy in a private chat or your Supervisor space



Better Prompts for Better Answers

For Caddy to answer fully in one interaction, advisers must start with prompts that are rich in detail and information.

Here are some key tips

Front-load with Context:

Include as much relevant information as possible in the first prompt.

- Client's core issue: Be specific (e.g., "denied benefit," "housing issue").
- Personal circumstances: Age, dependents, health, employment, housing.
- Existing actions: Steps already taken by the client.

Anticipate Caddy's Needs:

Provide specific details like:

- Dates, amounts, deadlines: Relevant to the situation.
- Names of entities: Agencies, individuals involved.
- Reference numbers: Case identifiers for benefits, etc.

Precision of Language:

- Avoid vague terms. Be clear and specific.
- Example: Instead of "unfair decision," state "incorrect assessment of X"

Don't Fear Long Prompts:

- Detailed information upfront is better than multiple follow-up questions.

Caddy Pilot

4-6 week trial

- 6 local offices
- Measuring accuracy of responses
- Impact on time of returning results
- Adviser feedback
- Evaluation being done by government team



Adviser Feedback

- See the value
- More trusted sources
- Have follow up questions
- Ability for self approval



Thanks for listening

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