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Step by Step:

A Practical Guide to Using Conversational AI
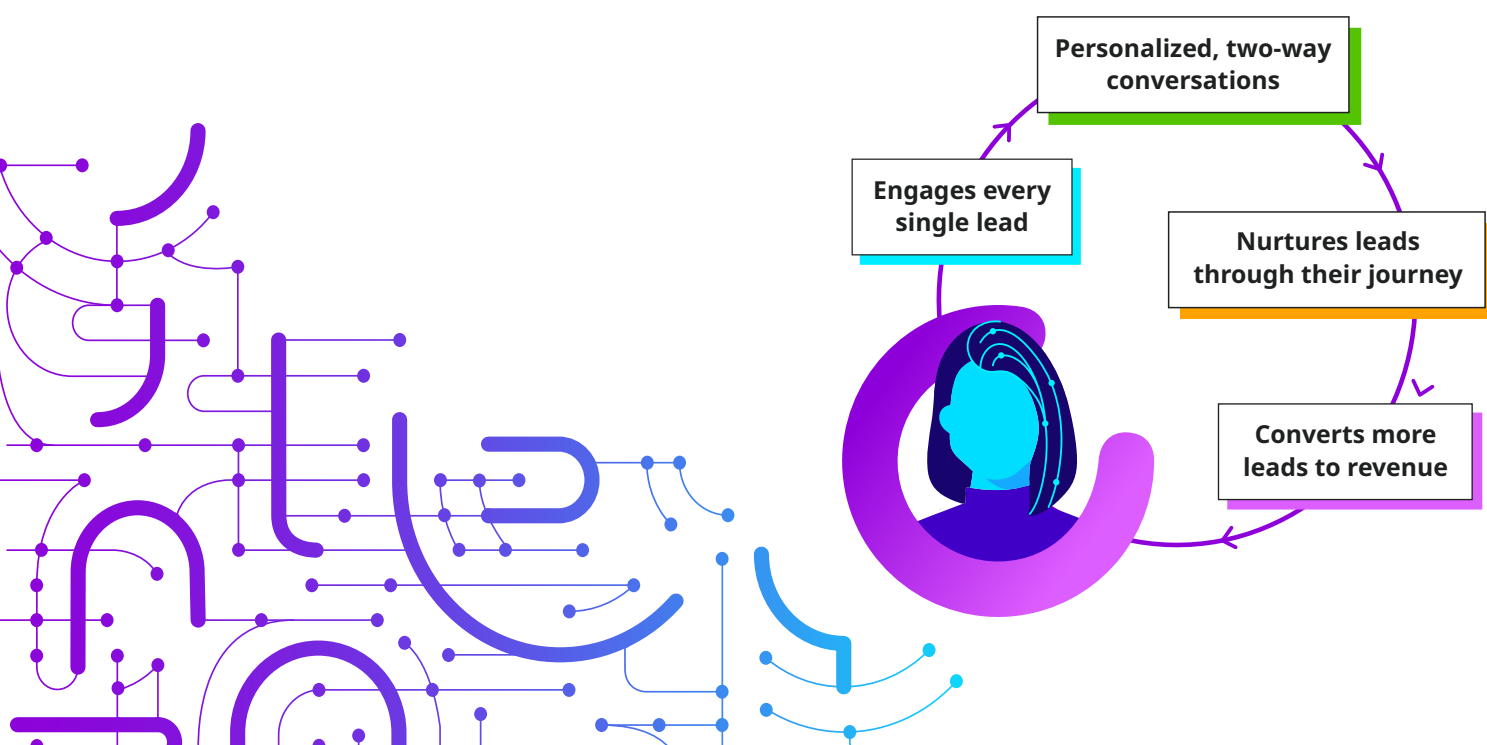
Introduction

Along a lead's journey from prospect to buyer, many things are required: a **pain point to bring a prospect to your company, an enticing hook, a solution to alleviate that pain point**, and more. But hidden underneath all of it is the support necessary to **gently push prospects from first contact to conversion**. After all, **interest doesn't turn into real buying intent** without **motivation, information, and** — as Sales and Marketing teams are well aware — **a bit of nudging**.

However, company resources are often stretched thin, and **efficiency** is becoming increasingly important, even as **buyers demand more personalization** and unique answers to their unique questions. So, for many Sales and Marketing teams, the question becomes, "How do I give each lead **the attention they crave without overstretching** our already-strapped resources?"

The answer is Conversational AI.

Rather than employ traditional methods that don't provide what modern buyers need, a **Conversica Revenue Digital Assistant™ (RDA)** can hold **real, human-like, two-way conversations** to **more accurately gauge what each lead needs**, provide valuable information, and **support them as they progress through the funnel**.

In this eBook, we'll guide you through **three of the steps in a buyer's journey** and explain how **Conversational AI** can **supercharge your team's efforts**.

- Personalized, two-way conversations
- Engages every single lead
- Nurtures leads through their journey
- Converts more leads to revenue

Step 1: Contact

When making **first contact with a lead**, there are generally two categories: they come to you (what's known as inbound), or you go to them (outbound). **Inbound is all about casting a wide net** and providing information to pique the interest of whomever needs to solve the particular problem for which you have a solution. **Outbound is generally more targeted**, reaching out to specific people or companies and directly posing a solution to a problem you think (or know) they have.

As such, the methods and tactics for these two methods **vary considerably**. For one, **inbound is usually handled by Marketing, while outbound is largely Sales**. But at the heart of both approaches are **two things: the goal of conversion** and the **need for conversation**.

LEAD STATUS		NA
Appointment Set	W	
Disqualified	Fred	2 total
Conversation Qualified	Michelle	3 total (2 new)
Further Action	Zhen	555-9302

New Meeting Scheduled

October 15
10:00AM PST
SFDC Link

Immediately Engage *Every Inbound Lead*

Let's say you have a lead who downloads one of your content assets. They fill out a form and get an email with a download link. For many companies, what happens next is **a generic follow-up email a few days later** — and to no surprise, these emails **largely don't convert**.

But with **Conversational AI**, leads instead get **immediate and personalized acknowledgement** of the action they took and an invitation to **continue the conversation**. Downloaded an eBook? An RDA can **mention the title and provide specific recommendations for what to read next**. Or perhaps the lead requested a demo. The RDA can instead **suggest a call** with a Sales team member.

>1 min
Response Time

Up to 391%
Increase in Conversion

Now, you may think this doesn't sound all that different from traditional marketing automation. But here's the difference: an **RDA wants leads to respond**. **Rather than talk at** their audience, **RDAs talk with them**, answering basic questions and providing valuable, relevant information that takes tasks off your teams' plates, not adds to them.

With an RDA, inbound leads are **supported far more effectively** and **dynamically guided along** paths that make sense for each lead, only being passed to Sales once they have **real buying intent**. This drastically **increases your funnel's efficiency**, frees up your team to focus on the most promising prospects, and makes **each lead feel uniquely seen and respected**.

Lead Downloads an eBook or Requests a Demo	RDA Reaches Out and Lead Asks for More Information	RDA Responds Quickly with Real, Two-way Communication	RDAs Passes to Sales with Real Purchase Intent	Your Funnel Efficiency Drastically Increases

Making Outbound *Efficient and Effective*

On the other side of the lead generation coin is outbound, where your leads need **just as much, if not more, care and attention**. Because prospects aren't intially displaying interest and instead being persuaded to engage, **conversion rates** from outbound are **naturally lower.**

However, **the opportunity** for Conversational AI **is monumental**. Rather than have your Sales team spend countless hours modifying an email template to fit multiple leads' situations for minimal return, an RDA can have **personalized conversations at scale**. After feeding an RDA with the right information, it can take your guidelines and create **truly bespoke experiences for each and every lead**, no thesaurus required.

The result is **game-changing**. Leads get personalized conversations that feel like a **cozy chat over coffee** instead of a cold call. You can test subject lines and get valuable data on what **resonates most** with your audience. And, you have **full control** over **when and where** you let an **RDA do the heavy lifting** — from **the very beginning**, only if a lead doesn't respond, or in whatever situation you wish. Best of all, an RDA does this **without bogging down** your Sales team and **seamlessly passes leads back** to them once a purchasing intent is established.

Step 2: Qualification

After talking with a lead, only **a very small percentage** will (or even should) be passed to your Sales team. For years, Marketing and Sales have used lead scores to attempt to better understand, or qualify, which leads are ready for the next step. Based on points, the complicated system is little more than a **guessing game** and **riddled with flaws and loopholes** that mean Sales ends up with a mixed bag of lead quality.

But with Conversational AI, there are no guesses. Conversica RDAs operate on the **Handraiser-Only Principle**, where **only the leads who show direct intent** are passed to Sales, **minimizing wasted effort**.

Take our inbound demo request lead example from step 1. After the RDA suggests a call with Sales, only if the **lead responds positively** will the RDA then pass the lead over. If the lead instead asks a question or requests additional information, the RDA provides the information and **keeps the conversation going**.

RDA Engages Outbound Lead and Suggests a Call with Sales	Lead Asks for More Information and RDA Keeps Engaging	Lead Interest Transforms to Intent, Asks to Speak to Sales	RDAs Passes Conversation Qualified Lead to Sales team	Resulting in Conversion Increases and Revenue Boosts

Only once the lead's interest has **transformed into intent** and **confirmed** they'd like to speak with Sales will an RDA consider the lead **Conversation Qualified** and pass it to Sales. As a result, your Sales team only gets the **highest-quality leads**. In turn, this **increases conversion**, **strengthens your pipeline**, and **boosts revenue**.

Step 3: Conversion

Leads come in all shapes, sizes, and interest levels. And, at the end of the day, some will pass through all your Marketing messages and polite persistence and simply not engage. Maybe it's not the right time, or another project got in the way. Regardless of the reason, **leads sometimes just go dark**.

A common tactic to **reawaken those leads** is a **nurture program**. But sorting through who did and didn't open an email, did or didn't click a link, and formulating individual campaigns to address every path along the way for these low-quality leads is wasted time. Equally ineffective are drip-fed templated emails, which leads often recognize and delete in bulk as soon as they're received.

Wins Back
Lost Opportunities and Former Customers

Reawakens
Leads that Go Dark by Continuously Nudging

Delivers
Powerfully Human® Conversations at Scale

An RDA, however, can **intelligently and continuously nudge leads** at **any stage** of their journey to **reawaken** them and capitalize on any who show signs of life.

Let's say our inbound demo request lead never did make it to Sales and went dark. An RDA can c**heck in and regularly send out feelers** to that lead, asking it what it needs. As soon as that lead responds, the RDA can instantly provide information and set the lead **back on the path to conversion**.

| Lead Goes Dark and Never Makes it to Sales team | RDA Checks In, Continuously Nudging Lead by Asking Questions | Lead Responds with Questions, Requests More Information | RDA Reawakens Lead, Answers Questions and Passes to Sales | Lead Nurtured, Set Back on the Path to Conversion |

What makes an RDA different is that it can do this for **EVERY lead**, **tailoring each conversation to fit leads' unique situations and actions**. This capability even extends to **winning back** churned customers. Release a feature that a former customer wanted, but you didn't have? An RDA can send **personalized outreach** about that new feature, **opening up the conversation** and the possibility of **regaining** their business.

The Benefits of Conversational AI

By implementing Conversational AI into these three steps of a buyer's journey, your team is ready to reap the rewards:

Increased Lead Quality

By conversationally qualifying each lead that progresses through your funnel, you can ensure only the highest-quality leads get passed to Sales. Lower-quality leads are continually nurtured and only advance once they've transformed into buyers with intent.

Higher Conversion Rates

Higher lead quality comes with higher conversion rates. Now that your Sales and Marketing teams are spending their valuable time on the leads most likely to convert, they can close more deals and secure more business.

Lower Sales Cycle Time

Since RDAs will only pass Handraisers to Sales, they have to spend less time convincing leads they're ready to buy.

Improved Efficiency

Use your existing systems, such as your Marketing Automation Platform, where they excel and augment their capabilities with an RDA to improve both the efficiency and the effectiveness of your team's available resources.
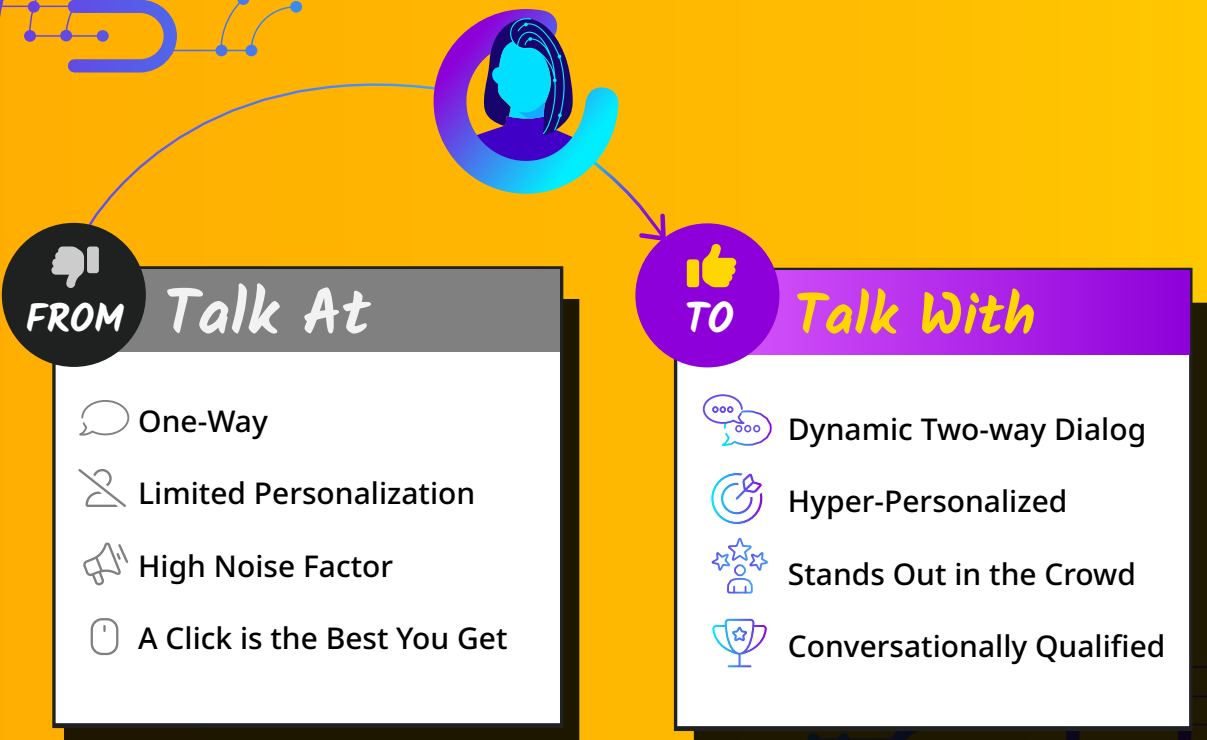
Enhanced Customer Relationships

By better understanding leads' needs and proactively engaging inactive customers with new, relevant information, you can more easily find ideal customers in their buying journey and recapture churned accounts.

Boosted Revenue

When everything works in tandem, more revenue is added to your business's bottom line.

FROM Talk At

- One-Way
- Limited Personalization
- High Noise Factor
- A Click is the Best You Get

TO Talk With

- Dynamic Two-way Dialog
- Hyper-Personalized
- Stands Out in the Crowd
- Conversationally Qualified

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Empower Your Team with Conversica

Conversational AI can be an incredibly powerful part of your marketing toolkit. With it and an RDA, all your efforts are empowered and taken to the next level.

Follow-up on all leads. Re-awaken dormant ones. Increase the quality of leads passed to Sales. Conversational AI transforms your routine marketing activities and cultivates amazing buying experiences, generating more revenue than ever.

Supercharge your team, effortlessly scale your efforts and unlock revenue.

Request a demo today