Onboarding Services

Conversica's Onboarding Services are designed to streamline and supercharge the launch and ongoing use of the Conversica platform and ensure immediate and long-term success with your Revenue Digital Assistant™.

By entrusting us to set your team up with comprehensive configuration, valuable training, and proven best practices, your team is freed to focus on your core business activities, while maximizing both your team's and your assistant's efficiency and productivity with the Conversica platform.

Conversica is more than a standalone tool; it's a critical part of your lead management processes and revenue generation moving forward. Our dedicated team is poised to handle the intricacies of initial customization and ongoing improvement to ensure you can fully and effortlessly realize the potential of your Revenue Digital Assistant™.

![conversica]

Professional Onboarding

Who It's For:
- Organizations with a single team, RDA, and language

What's Included:
- Integration Configuration & Testing
- Conversation Consultation and Best Practices
- User Management and Alerts
- Revenue Digital Assistant™ Configuration
- Best Practices Consultation and Training

INTEGRATION CONFIGURATION & TESTING

Purpose: Integrate Conversica with your standard tech stack and test data syncing among platforms.

Process: Whether you use HubSpot, Marketo, Salesforce, Microsoft Dynamics, or Eloqua, we'll set up and test your Conversica instance with your chosen CRM or MAP.

Payoff: Have all your lead, customer, and campaign data where you need it, when you need it.

USER MANAGEMENT & ALERTS

Purpose: Provision the team members who will be working in the Conversica platform and set up notifications.

Process: Make sure your team has the access they need in the Conversica platform to set up your organization for success. Plus, we'll help you setup automatic notifications and alerts to always be apprised of what's going on.

Payoff: Give your team the access they need and ensure they — and you — never miss an update.

CONVERSATION CONSULTATION AND BEST PRACTICES

Purpose: Match your business objective with the right conversation.

Process: Get support throughout conversation configuration. We review the available skills and determine which conversations fit best with your use case. We'll also consult on setting up automatic triggers and conversation rules on your primary use case, plus train you on the conversation editor and best practices for leveraging variables.

Payoff: Get to payoff faster & optimize the performance of your conversations.

ASSISTANT CONFIGURATION

Purpose: Determine the persona of your RDA.

Process: We'll help you bring your RDA to life and establish your assistant's name, title, email address, and working hours within Conversica.

Payoff: Breathe a sigh of relief. Help is on the way, and now you can easily reference them by name

⊘ Support As You Grow

Conversica's Onboarding Services start you on the right foot with Conversational Marketing. As your organization grows and your needs evolve, we have standard packaged expansion services available, so you're supported at every stage of growth.

Premium Onboarding

Who It's For:

→ Organizations with multiple use cases, teams, or need advanced workflow support

What's Included:

→ Everything in Professional Onboarding
→ Multiple Use Case and Language Setup
→ Chat Setup and Large Language Model (LLM) Training

MULTIPLE USE CASE & LANGUAGE SETUP

Purpose: Seamlessly support your global operations across multiple teams, use cases, and languages.
Process: We first understand your desired use cases and required languages in which your RDA will operate. We'll then configure your particular setup to best suit your organization's needs, including multiple assistants, if required.
Payoff: Launch campaigns effortlessly, even within more complex situations. All your teams will have what they need to best utilize Conversica and your RDAs.

CHAT SETUP & LARGE LANGUAGE MODEL (LLM) TRAINING

Purpose: Set up and integrate Conversica Chat with your assistant and CRM and/or MAP to capture leads on your website.
Process: We will configure your assistant and provide support for deploying your RDA on your website, including training your assistant with your dataset and configuring guidelines. We can also help with integrating your assistant's chats with your lead management processes in your CRM and/or MAP.
Payoff: Have authentic conversations with website visitors via an assistant who can answer complex, free-form questions and guide visitors to your desired outcome throughout the buyer journey.

ꙮ Conversica API Integration Add-On

Conversica has native integrations with many of the top CRMs and MAPs: Salesforce, Microsoft Dynamics, HubSpot, Eloqua, Salesforce Marketing Cloud, Marketo, and Pardot. If your organization requires integration with a platform not listed here and has the in-house experience to utilize the Conversica API, this add-on allows for the more in-depth discussions, specialized consulting, and extended time frame required to make full use of your assistant and the Conversica platform.