The Essential Guide to Conversation Automation:

The *Best Way* to Engage Customers and Win Revenue

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Content

The Follow-Up *Challenge* for Revenue Teams

Good news! Your Marketing team drove an influx of new leads from a webinar, campaign, or tradeshow. This should be a cause for celebration, right?

Well, here's the bad news. Your Sales team's excitement turns to frustration when that lead generation success is followed by limited Sales gains and discouraged Sales Reps complaining about quality.

What happened? Clearly, a crucial element for success is missing between lead generation and sales success. Sure, lead qualification tools try to anticipate which leads are sales-ready, which need to warm up, and which are cold as ice. But these are only estimates. What really qualifies a lead is a conversation with that lead driving them to say they want to meet with a Salesperson.

A similar challenge plagues Customer Success teams. The good news is that you have an eager team of Customer Success Managers (CSMs) to help customers get the most out of your offerings. Not only do CSMs field support questions and handle renewals—they also provide proactive assistance that delights customers and hopefully gets them to expand their engagements with your company.

But there's always a flip side: Proactive assistance often takes a backseat as CSMs juggle dozens of tasks for 50 or sometimes 100 customers per Rep. This manifests itself in impersonal tech touches for the majority of customers, while only high-value accounts and squeaky wheels get the attention they really need.

The common thread for all three of these revenue teams: **Reaching out to each and every contact with a personalized, two-way conversation is impossible with people power alone; not to mention tedious.**

These capacity constraints:

1. Force Sales teams to cherry-pick leads, which inevitably results in missed opportunities—leaving Marketing teams deflated and Sales teams frustrated.
2. Force Customer Success teams into reactive mode—leaving the majority of customers with a less-than-ideal experience.

This is the conversation gap that leaves leads untouched, customers unengaged, and team members frustrated. There must be a better way.

Truth be told, it takes a **conversation to influence revenue.** Conversation Automation is the best way to tackle the conversation gap head-on; resulting in more opportunities for your revenue teams.

Marketers feel Sales isn't following up sufficiently to generate all the opportunities they can from campaigns, and Sales pushes back on Marketing claiming leads can't be reached and quality is low.

Customer Success teams can't proactively keep up with high customer volumes, resulting in dissatisfied customers, missed opportunities, and ultimately churn.

Today's Outreach Approaches *Aren't Working*

What's Going Right?

It's not all bad news. Marketers, Salespeople, and CSMs are always looking for solutions and improvements. And many of the steps they've taken deserve recognition. So, here's what's going right.

Success in generating more leads

Marketers have never been more efficient at understanding buyer personas, creating compelling content and campaigns, and generating leads. Sales has never been more effective with the specialization of Sales Development, Inside Sales, and Field Sales, plus the myriad tools available to accelerate the sales process.

Additionally, most revenue teams are applying automation solutions to help fill in the gaps. Customer Relationship Management (CRM) applications from Salesforce and Microsoft streamline management of Sales, Marketing, and Customer Success. Sales email automation tools like SalesLoft and Outreach or Account Based Marketing solutions make every Sales Rep a marketing machine. And, marketing automation platforms from Marketo and HubSpot help Marketers automate and scale their campaigns by:

- Executing and tracking email, web, and social campaigns
- Scoring leads to determine which should go to Sales
- Reporting on response rates, engagement, conversion, and revenue

So, automated demand generation and sales outreach campaigns can produce more leads—and higher quality leads—with less human effort. But what happens when all these leads and contacts get handed off to a Sales team for follow-up? Both sides may end up disappointed in the outcome.

Essential customer guidance

Bringing on new customers is only part of the equation. Keeping those customers happy, engaged, and spending is essential for building a healthy business. Customer Success teams manage this process closely, identifying opportunities in the customer lifecycle to renew existing relationships, expand customer engagements, and prevent churn.

CSMs leverage several techniques and technologies to help them connect with customers. This includes CRMs to manage customer data, email automation tools to share educational materials, and customer satisfaction surveys to identify what's working and what needs improvement. But these technologies only provide estimations of customer health or offer impersonal touches to customers—and cannot deliver the vital two-way conversations necessary to make every customer feel heard and valued.

What's going wrong

You can't fix a problem until you admit there's a problem. Here are a few common issues facing revenue teams hoping to squeeze more success out of their operations.

Due to time constraints, Salespeople often cherry-pick leads, preferring to go after what they believe are the hottest and more recent leads. Similarly, Customer Success Managers are forced to focus on a few high-value accounts. In both cases, this leaves many potential opportunities unexplored and untouched.

Failure to fully contact and engage leads

Most Marketing teams are doing a good job of generating more prospects than the Sales team can handle. So, they implement lead scoring techniques to determine who is a Marketing Qualified Lead (MQL).

While a lead-scoring funnel might help, it can also miss high-quality leads that never reach a predetermined threshold but are nevertheless real opportunities. Even highly-scored leads passed to Sales may not be easy to reach, and Salespeople give up after a few attempts, eager to move on to the next batch of leads. But, every time a lead isn't worked fully or contacted, you're missing out on a potential sale.

Finger-pointing over lead quality

When leads aren't contacted and converted, Sales and Marketing teams fall out of alignment and fail to deliver the expected returns. This can create some sour feelings within your business. Marketers feel Sales isn't following up sufficiently to generate all the opportunities they can from campaigns—and Sales pushes back on Marketing claiming leads can't be reached, and quality is low.

Capacity constraints result in customer churn

When you multiply the variety of tasks placed on CSMs by the 50 or even 100 customers each CSM is supposed to manage, you can see the capacity challenges facing Customer Success teams. Even a superstar CSM can't manually keep up.

Unfortunately, this means that the vast majority of customers get an impersonal tech touch, while high-paying accounts and squeaky wheels get all the CSM's attention. The result? Inconsistent customer experiences leading to sagging enthusiasm, missed opportunities, and ultimately churn.

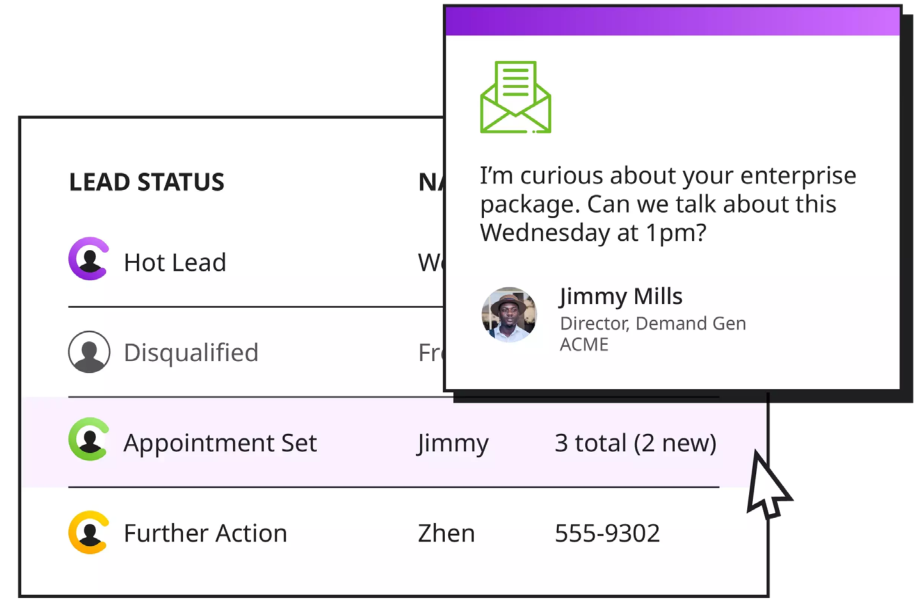
So what can you do?

There ought to be a way to connect with every contact, every time, freeing up revenue teams to focus on more valuable activities and wringing more ROI out of every interaction. The good news is that finally, with a Revenue Digital Assistant™ from Conversica, there is.

Common challenges facing revenue teams:

- **No one sees the lead**. Most organizations generate more leads than their team can engage, so they employ techniques like lead scoring to prioritize who gets the personalized touch. Marketing automation systems are good at assigning scoring points to demographic attributes, like title and email address, firmographic attributes, like company size and location, and behavior, like clicks, downloads, and page views. All is good and well when these values are known, but what happens when a high-value prospect registers with a personal email address and no title? A low lead score means no one follows up right away, and the opportunity to get into that two-way dialog is postponed or lost.
- **Revenue team members give up too soon**. Even when the right lead or customer gets routed to the right people, it doesn't mean the person is easy to reach. After two or three attempts, it's human nature to assume the person isn't interested and move on to the next contact. It often takes 11-15 touches to convert a lead, and almost as many outreach attempts to contact a lethargic customer. Making so many attempts isn't possible if each one is to be personalized.
- **Emails aren't read**. Knowing that getting a prospect or customer into a live phone conversation is a challenge, almost every business also uses email outreach. Email has the advantage of allowing contacts to determine when and where to engage, increasing the likelihood of a productive conversation. But emails are also easily avoided, ignored, or lost in a noisy inbox. You need to persistently deliver high-quality, personalized emails, which takes time that many Salespeople and CSMs simply don't have.

Successfully *Engaging Contacts* With Conversation Automation and Revenue Digital Assistants™



Successfully converting leads into engaged sales conversations benefits both Marketing and Sales. And obviously, Customer Success teams retaining and expanding customers is a benefit for the business overall. **But it takes a conversation to influence revenue**—and your revenue teams simply don't have the time to do it effectively and at scale.

You've got to start a two-way dialog and get the lead talking back and progressing through the customer journey. The problem is that simply amplifying one side (your side) of the conversation won't break through the built-in barriers in communication.

Fortunately, there is a way to overcome these barriers to communication, deliver iconic customer experiences, and drive revenue opportunities with ease. By adopting innovative technologies like **Conversation Automation** and **Revenue Digital Assistants**, businesses can scale personalized, two-way, human-like conversations with leads and customers. Not only do these AI-driven conversations enable businesses to promptly and persistently touch contacts with unique messages, these conversations actually motivate contacts to take the next best action resulting in revenue. We are calling this step-change in the way companies conduct business and interact with customers the **Growth Workforce**.

The Growth Workforce means Marketers get the consistent lead follow-up they desire, Salespeople get to focus on leads who've identified themselves as sales-ready, and Customer Success teams can offload repetitive outreach in favor of helping the customers that need it.

Automated two-way human-like touch

Conversation Automation is exactly what it sounds like, a way to automate human-like, two-way conversations with leads and customers. By leveraging a concert of technologies—Nature Language Processing, Machine Learning, and Artificial Intelligence—**Revenue Digital Assistants** deliver the right message, at the right time, on the right channel to motivate leads to progress through the funnel.

Because Revenue Digital Assistants can scale conversations with each and every lead, they can weed out low-quality leads, warm up leads in need of attention,

Marketer Spotlight:
Talend

"Once the team was able to understand that Conversica truly is using AI-powered conversations to contact, engage, and qualify leads, there was no question at all that Conversica would be great for Talend."

Adam Benitez,
Marketing Operations Manager at Talend

Results:

- **31% engagement rate in two-way conversations with AI Assistant**
- **Surfaced 890 hot leads from pool of low-quality leads**
- **Created $10 million in pipeline opportunities within the first year**
- **Helped win nearly $1 million in bookings**

Customer Success Spotlight:

OEConnection

"Almost immediately we saw engagement and opportunities. Our Revenue Digital Assistant got customers to raise their hands and helped increase and improve retention."

Carrie Watson,
Director of Customer Success at OEConnection

Results:

- **23% engagement rate**
- **Increased retention attributed directly to their AI Assistant**
- **5,700 hours saved by using a Revenue Digital Assistant**

and accelerate sales-ready leads who have yet to MQL. The same goes for AI-driven interactions with customers. Whether it's autonomously handling renewals, touching base with customers with low product usage, or educating customers about expansion opportunities, an RDA can make a big difference. This is not guesswork. This is Conversation Qualified!

How does a Revenue Digital Assistant work?

Automated engagement conversations picked up by a Revenue Digital Assistant bridge the gap between your automated tools and your revenue teams, adding value to each. As Marketing receives inbound leads, the Digital Assistant reaches out to initiate a personal conversation and determine interest for the Sales team. Similarly, existing customers are delivered personalized conversations at important junctures in the customer lifecycle, helping to get ahead of renewals, expansion opportunities, or negative events that could result in churn. Using a friendly, colloquial style, the Digital Assistant engages contacts to start a real conversation, a task that can be done at scale only with an intelligent machine. The AI emails are context-sensitive, generated in real-time, and individualized from the start, so they look and sound like they are coming from a real person. Better still, Conversation Automation is continually optimized through these real-world interactions to constantly improve over time.

The Digital Assistant is polite yet persistent, reaching out more often than even the best Sales Rep or CSM ever could. And unlike an employee, the Conversation Automation solution never gets tired, has a bad day, or takes a vacation.

When a lead or customer responds, the Revenue Digital Assistant accurately and autonomously interprets the incoming message (over email, SMS, or website chat) and takes the appropriate next step; whether sending another email for more information, alerting the Salesperson or CSM, or updating the CRM or marketing automation system. The Digital Assistant's goal is to set a meeting with the Salesperson or Customer Success Manager for those who are interested and, just as importantly, automatically determines who isn't ready and needs some more nurturing before they are ready to talk.

More conversations, less effort

All of this contact engagement, back-and-forth conversation, and Conversation Qualification happens behind the scenes, thanks to the Revenue Digital Assistant. This frees Sales Reps and CSMs to focus on converting opportunities rather than chasing them. Better still, revenue teams have visibility into how the AI-driven conversations are going so nothing is lost and employees are well-prepared when going into a call with Conversation-Qualified contacts.

Revenue Digital Assistant can support your revenue team at significant cost savings. For less than adding just one more Salesperson or CSM, your entire team gets a Revenue Digital Assistant with unlimited conversational capacity always working on their behalf.

Sales Spotlight:

Hootsuite

"We were struggling with figuring out how many nurture flows we needed—and how many emails we needed per nurture flow. It was a very resource-intensive process... Conversica was the solution we needed to find the needle in the haystack."

Ana Baroncelli,
Director, Pipeline & Marketing Automation at Hootsuite

Results:

- **10x conversion rate from content leads**
- **More than 108,000 total saved hours**
- **4% engagement rate from content leads (up from 0.5%)**

When Contacts Talk Back: What Conversation Automation Can Tell You

> *"Ultimately, this is an amazing tool that lets you cover a lot of ground and get a lot of ROI on the marketing investments you've been making for relatively low cost."*
>
> **Extreme Networks**

A two-way conversation between the contact and Revenue Digital Assistant elicits essential information for personalized follow-up, including:

Best Method and Time for Contact

The Revenue Digital Assistant finds out whether the lead or customer wants to be contacted by email, phone, or text message and confirms the best contact info. In addition, the Revenue Digital Assistant is constantly optimizing the best time to contact leads or customers to get a response, taking into account when this lead originally inquired and when similar contacts have responded. Learning the best way to reach someone dramatically increases the chances of actual person-to-person contact.

Interest or Intent

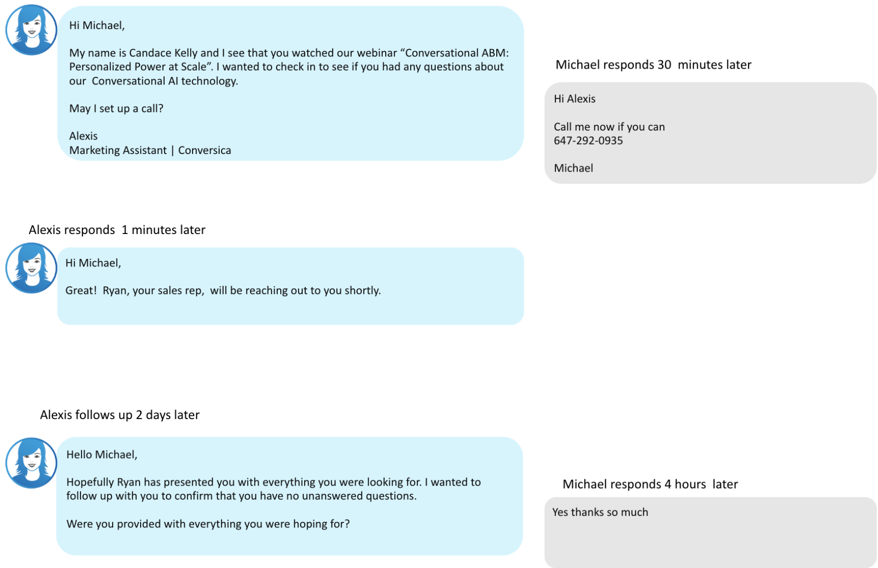
Finding leads or customers that have high interest but also a willingness to speak to a Salesperson or CSM is critical for success. Interest alone is not enough; you want to know who is ready to move into a buying cycle, and focus your resources there. The Revenue Digital Assistant contacts each lead or customer that has expressed interest to determine which are ready to speak to someone at your company, and then makes that connection quickly and professionally, so no serious contact is dropped.

Now or Later

Even with interest and intent communicated, many contacts aren't yet ready to speak to an employee because they're busy, working on higher-priority projects, or about to go on vacation. The Revenue Digital Assistant autonomously reads and understands out-of-office replies and responses like "ping me in two weeks" or "check with me the first week of October" and automatically re-engages the contact at the appropriate time, freeing your staff from having to manually track follow-up tasks.

Fully Satisfied

A few days after a Conversation Qualified lead or customer is handed off from the Revenue Digital Assistant to the Salesperson or CSM, the Digital Assistant checks in with the contact to ensure they got everything they needed. Positive responses mean everything is working well, whereas negative feedback such as "They never called me" or "I didn't get all of my questions answered" indicate areas for process improvement and training. These missed contacts are once again raised to the notice of the Sales or Customer team, meaning that no customer is left behind and no opportunity is missed.



AI-driven email, SMS, or website chat conversations allow you to focus your efforts on contacting leads or customers who have an expressed intent to engage.

The Personalized Follow-Up *Solution* for Revenue Teams

> *"Conversica is a wonderful force multiplier—there is no way we could ever have staffed up to the levels needed to accomplish what it has done for us."*
>
> **Epson America**

More emails and phone calls aren't the only options for reaching interested contacts; especially considering how difficult this is to scale. New lead engagement methods powered by Artificial Intelligence and Conversation Automation are reaching more leads and customers, more quickly and with a higher likelihood of conversion, freeing up employees, and delivering more value across the customer lifecycle. That's the strength of the Growth Workforce powered by Conversation Automation and Revenue Digital Assistants.

So what's the after-state of hiring a Revenue Digital Assistant to empower your Marketing, Sales, and Customer Success teams? The good news is that your revenue teams do a better job of effectively tackling an influx of new leads or proactively keeping up with customers to discover revenue opportunities. The even better news is that your team members can accomplish more high-value tasks by letting a Revenue Digital Assistant handle personalized conversations at scale.

Thanks to the Revenue Digital Assistant for Marketing and Sales teams:

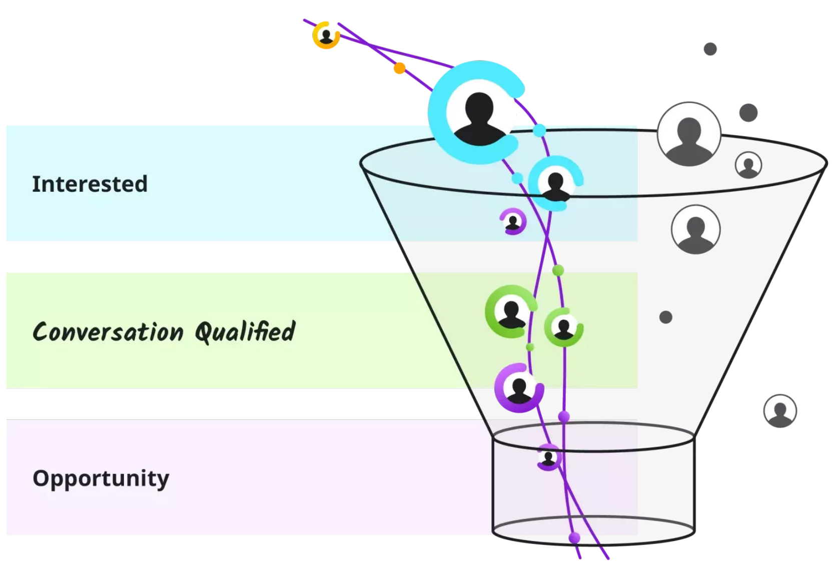
- Sales-ready leads are accelerated to your Sales team,
- Warm leads are autonomously provided the help or resources they need,
- And ice-cold leads are worked fully without burdening your Salespeople.

As for Customer Success teams, Revenue Digital Assistants enable:

- Highly scalable personalized outreach to make every customer feel valued and heard,
- Autonomous AI-driven outreach at crucial moments in the customer lifecycle to drive revenue and ensure healthy product usage,
- And team members to focus on assisting customers rather than chasing the next meeting.

In the end, Marketing is happy to see 100% lead coverage, Sales is happy talking to prospects that actually want to hear from them, and Customer Success can perform at its peak.

Are you ready to adopt Conversation Automation for your Marketing, Sales, and Customer Success?



About Conversica

Conversica's AI-powered Digital Assistants supercharge revenue teams for growth. They enable Marketing, Sales, and Customer Success teams to acquire untapped revenue through perfectly structured conversations. With billions of human interactions spanning more than a decade, Conversica's AI Assistants have learned to influence and persuade customers and prospects throughout the customer journey lifecycle. Unlike chatbots, they are powerfully human and can hold meaningful conversations at every touchpoint. They fuel the conversations that create brand loyalty and maximize every revenue opportunity. They know how to say just the right thing at just the right time to help grow revenue, improve customer experience, reduce costs, increase operational efficiencies, and build brand awareness. Conversica's Conversation Automation platform is used by leaders nationwide to get the conversation going and build the workforce of the future, today.

To learn more, visit conversica.com
and follow the company on Twitter, LinkedIn, and Facebook.