Conversation Management Admin *Services*

Conversica's Conversation Admin Services are designed to alleviate the day-to-day workload of launching campaigns within the Conversica platform, ensuring optimal performance of your Revenue Digital Assistant™.

By entrusting us with these administrative tasks, you gain the freedom to focus on your core business activities, maximizing efficiency and productivity.

Our dedicated team is poised to handle the intricacies of customization and ongoing maintenance, allowing you to extract the full potential of our product effortlessly.

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Conversation *Configuration*

What's Included:

- Map/Clone Contact Lists in Conversica
- Configure Variables and Cadence
- CRM Pull Fields
- Submit Test Leads
- Lead Volume Launch Timing Analysis

MAP/CLONE CONVERSICA CONTACT LISTS

Purpose: Add pull fields for conversation variables or conversation rules to automatically fill per lead messaged.

Process: We consult on and set up any desired fields that live on your lead or contact object within your org.

Payoff: Allows automated fill-in of message variables by utilizing fields on the lead or contact object.

CRM PULL FIELDS

Purpose: Map/clone new Contact Lists (campaigns, marketing lists, etc.) for leads.

Process: We map or sync new campaigns or lists within your integrated CRM or MAP to your Conversica dashboard so it's ready to configure.

Payoff: Allows you to focus on your internal org and tech stack that you're already familiar with.

SUBMIT TEST LEADS

Purpose: Submitting test leads to test the interaction dialog, AI model accuracy and message preview.

Process: We create test leads or contacts within your CRM/MAP and send tests to your assistant per your requirements while also monitoring data ingestion, AI feedback and message formatting.

Payoff: You save time on the test setup so you can see results of the test and go live faster.

CONFIGURE VARIABLES AND CADENCE

Purpose: Add desired message variables to the conversation and set timing/cadence for exchanges.

Process: Using a provided form, add the copy or message variables you want to include. We'll input them into the desired mapped list for you. You can also include specific timing or cadence for each attempt as well as subject lines.

Payoff: Focus on the big picture of your messaging. Leave the implementation of those words, subject lines, and timing to us.

LEAD VOLUME LAUNCH TIMING ANALYSIS

Purpose: Calculate and configure lists required for desired lead volume and timing of engagement.

Process: We take the number of leads you need messaged and the timeframe and come up with a specific plan to ensure outreach hits those marks. This is done by carefully fine-tuning the timing/cadence of lists, lead message throttling and volume of campaigns/lists.

Payoff: Take the guesswork out of determining the best way to handle a large volume of leads in a set timeframe.

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Conversation *Rules*

What's Included:

- Creation of Conversation Rule Sets
- Custom Attribution Fields
- Rep Assignment Tool Configuration
- Contact Movement Tool Configuration

CREATION OF CONVERSATION RULE SETS

Purpose: Segment leads using field data from your CRM and/or MAP with our tool.

Process: We will set up conversation rules to automatically segment your leads or contacts into manageable pools, as well as send leads separate messaging based on their attribution or exclude them altogether.

Payoff: Save time sifting through lead reports to segment on your end and allow us to segment based on field values with our conversation rules tool.

CUSTOM ATTRIBUTION FIELDS

Purpose: Include custom fields from your CRM/MAP to be utilized for conversation rules or message variables.

Process: Provide us with custom fields within your CRM or MAP and we will add them in our system for use as pull fields in specific message variables or for the conversation rules tool to help with segmentation.

Payoff: Tailor your assistant's messages more to your submitted contacts based on custom fields or make segmentation easier through conversation rules.

REP ASSIGNMENT TOOL CONFIG.

Purpose: Set up true random assignment or specific assignment to your sales reps within Conversica based on specific attribution on the lead or contact list.

Process: Send us your strategy on how you want to segment or round robin your leads based on specific reps, teams and attribution on leads.

Payoff: Remove the guesswork of having to assign leads evenly throughout your teams for each campaign. Utilize custom fields to assign based on specific criteria.

CONTACT MOVEMENT TOOL CONFIG.

Purpose: Contact Movement Rules govern how leads move through different exchanges within a conversation based on external events, optimizing your team's process and ensuring contacts are directed to the most relevant stage of the conversation.

Process: We define rules and conditions that determine how contacts move between conversation exchanges. You can set criteria based on specific field values, such as the "Lead Status" or "Campaign Name."

Payoff: Fine-tune your lead outreach journey by moving them to specific exchanges based on unique criteria.