


## Artificial Intelligence for Sales and Marketing:

# The fastest, easiest way to engage, qualify and follow-up with sales leads

With new marketing and sales automation tools, it's easier than ever to get your message out to prospects. But when they respond and express interest, it's not easy to engage every single one of them to find out who's truly interested in your product or service. Learn how an AI-powered Sales Assistant engages more prospects, generates more sales appointments and ultimately results in more closed-won deals than a human team alone.

# Table of contents

---

- 
- 1. The lead follow-up challenge for Marketing and Sales**
  - 2. Today's outreach approaches aren't working**
  - 3. Successfully engaging leads: The AI solution**
  - 4. When leads talk back: What AI lead engagement can tell you**
  - 5. The Conversica solution: Faster, easier**

# The lead follow-up challenge for Marketing and Sales



When Marketing drives an influx of new leads from a webinar, campaign or tradeshow, it should be cause for celebration. But excitement quickly turns to frustration when that lead generation success is followed by limited sales gains and discouraged sales reps complaining about lead quality. A crucial element of success is missing, and that's the ability to effectively engage and qualify every single lead. It's a difficult and tedious task for Sales, so it's natural for them to cherry pick the best leads, make a few contact attempts and then move on to the next batch.

## What's going *right*

### **Success 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.

### **Applying automation solutions**

Customer relationship management (CRM) applications from Salesforce and Microsoft streamline management of sales, marketing and customer service. Sales email automation tools like SalesLoft and Outreach make every sales rep a marketing machine. And, marketing automation software from Marketo and HubSpot helps 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.





# The lead follow-up challenge for Marketing and Sales

## What's going *wrong*

### Failure to fully contact and engage leads

Most marketing teams are doing a good job generating more prospects than the sales team can handle. So, they implement lead scoring techniques to determine who is marketing qualified. While a lead-scoring funnel might help, it can also miss high-quality leads that use personal email addresses or leave company and title fields blank. 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 contacted, you're missing out on a potential sale.

### Finger pointing over lead quality

When leads aren't contacted and converted, sales pipeline is insufficient and marketing campaigns don't deliver the expected return. Sales and marketing fall out of alignment. 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 reach and quality is low.

There ought to be a way to connect with every lead, every time, freeing up salespeople to focus on more valuable activities and wringing more ROI out of every marketing campaign. The good news is that finally, with an AI-powered Sales Assistant from Conversica, there is.





# Today's outreach approaches aren't working



Successfully converting leads into engaged sales conversations benefits both Marketing and Sales but can't be done with just one-way conversations. You've got to start a two-way dialog and get the lead talking back. The problem is that simply amplifying your side of the conversation won't break through the built-in barriers in communication.

## **Barrier 1: 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 human 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.

## **Barrier 2: Humans give up too soon**

Even when the right leads get routed to the right people for engagement and conversion, 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 lead. But research shows that it often takes 7-12 touches to convert a lead, despite the fact that in most organizations, making so many attempts isn't possible if each one is to be personalized.

## **Barrier 3: The lead doesn't answer the phone**

The rise of inside sales centers, power dialers and local presence numbers have made reaching prospects by phone much more difficult. Busy prospects screen phone calls, even if they might ordinarily be interested, so it's unlikely that initial outreach by phone will be successful in contacting, engaging and converting that lead.



# Today's outreach approaches aren't working



Research on the effectiveness of sales calling demonstrates the problem. In a study from Baylor University<sup>1</sup>, out of 6,264 calls placed during a two-week period:

- 17 percent were non-working numbers, 55 percent were not answered
- Only 28 percent of the calls were answered
- Of the 1,774 answered calls, 91 percent were not interested
- Reps had to make 209 calls to obtain one appointment or referral
- Overall success rate for the calling effort was 0.5 percent (30 appointments and referrals ÷ 6,264 calls placed)

Churning out enough phone calls to convert enough leads is beyond the endurance of even the strongest sales reps. But there is a silver lining: research shows that when a phone call is preceded by an email conversation, the prospect is much more likely to take that call and have the conversation that converts them into a meeting or sale.

## **Barrier 4: Sales emails aren't read**

Knowing that getting a prospect into a live phone conversation is a challenge, almost every business also uses email outreach. Email has the advantage of allowing prospects to determine when and where to engage, increasing the likelihood of a productive conversation. But email are also easily avoided, especially when they look like sales pitches or end up in the spam folder. In a well-cited analysis of email marketing campaigns<sup>2</sup>, just 22 percent of emails were opened by prospects – a number that might work for broadcasting to a large audience, but isn't going to help create one-to-one conversations.

So, if leads aren't properly prioritized, are hard to reach by phone and are deleting sales and marketing emails, how do you reach them?





# Successfully engaging leads: The AI solution

More emails and phone calls aren't the only option for reaching interested prospects. New lead engagement methods powered by artificial intelligence are reaching more leads, more quickly and with a higher likelihood of conversion, freeing up salespeople and delivering more value for marketing campaigns.

## The human touch, but automated

Automated lead engagement conversations powered by artificial intelligence (AI) bridge the gap between your automated marketing tools and your sales team, adding value to each. As marketing receives inbound leads, an AI sales assistant reaches out to initiate a personal conversation and determine interest. Using a friendly, colloquial style, the sales assistant engages leads 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, yet they are continually optimized to generate a response.

The sales assistant is polite yet persistent, reaching out more often than a typical sales rep but never gets tired, has a bad day or takes a vacation.

When the lead responds, the AI intelligently interprets the text of the email and takes the appropriate next step, whether sending another email for more information, alerting the sales person or updating the CRM or marketing automation system. The assistant's goal is to set a meeting with the sales person for those who are interested and, just as importantly, automatically determines who isn't ready and needs some nurturing through marketing.

## More conversations, less effort

All of this lead engagement, back-and-forth conversation and prospect qualification happens behind the scenes, while sales reps focus on the more valuable work of selling. When a lead is ready and qualified, the assistant introduces the appropriate salesperson and seamlessly hands off the conversation. The salesperson is kept updated on the conversation and naturally takes over the conversation as if the meeting had been set by a real assistant.

With the support of an AI sales assistant, sales teams spend their time talking to qualified prospects, not tediously dialing the phone or sending emails. And, the marketing team benefits knowing that every single lead gets complete and thorough follow-up and campaigns deliver their full ROI.

An AI sales assistant can support your sales team at a significant cost savings. For less than adding just one more salesperson, your entire team gets a 24/7 sales assistant working on their behalf.

*"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





# When leads talk back: What AI lead engagement can tell you



A two-way conversation between the prospect and the AI sales assistant elicits essential information for proper sales follow-up, including:

## Best Method and Time for Contact

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

## Interest or Intent

Finding leads that have high interest but also willingness to speak to a sales person is critical for sales success. Interest alone is not enough; you want to know who is ready to move into a buying cycle, and focus your sales resources there. The AI sales assistant contacts each lead that has expressed interest to determine which are ready to speak to sales and then makes that connection quickly and professionally so no serious lead is dropped.

## Now or Later

Even with interest and intent communicated, many leads aren't yet ready to speak to a salesperson because they're busy, working on higher priority projects or about to go on vacation. The AI sales 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 lead at the appropriate time, freeing your sales people from having to manually track follow-up tasks.

## Fully Satisfied

A few days after a qualified lead is handed off from the AI sales assistant to the sale person, the assistant checks in with the lead to make sure they got everything they needed. Positive responses mean everything is working well, whereas negative feedback such as "he never called me" or "I didn't get all of my questions answered" indicate areas for process improvement and training.

*"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](#)





# When leads talk back: What AI lead engagement can tell you



## MESSAGES FROM AI SALES ASSISTANT

Sunday, 6:36 p.m.

Dear Roger,  
I see you downloaded our white paper. I hope you are finding it helpful! Would you like to speak to one of our sales reps? Let me know.

Thanks a bunch,  
Alex  
Sales Assistant

Sunday, 7:43 p.m.

Dear Roger,  
Your sales rep, Mike, would like to give you a call. Is 212-555-5555 the best number to reach you during the day?

Thanks and have a great day,  
Alex  
Sales Assistant

Thursday, 2:15 p.m.

Hi Roger,  
I just wanted to follow up and make sure Mike was able to help you. Did he get you everything you need?

Have a good day,  
Alex  
Sales Assistant



## RESPONSES FROM LEAD

Sunday, 7:10 p.m.

Hi Alex,  
That would be great. I'm in full day meetings Monday and Tuesday but the rest of the week is good.

Thanks,  
Roger

Monday, 8:51 a.m.

Have him call my cell at 212-333-3131. That's better since I never answer my desk phone.

Roger



## ALERT SENT TO SALES REP

Thursday, 5:17 p.m.

Yes he did. We spoke yesterday afternoon, we're moving forward with a demo for the larger team. Thanks for all your help.

Roger

AI-driven email conversations allow you to focus your efforts on contacting leads who have an expressed intent to engage.



# The Conversica solution: Lead engagement that's faster, easier

Conversica's AI sales assistant empowers salespeople to focus on selling and closing deals instead of chasing down leads. The assistant engages prospects in natural, two-way human conversations, is always persistent, always polite, and tirelessly reaches out to every single lead, as many times and over as long a timespan as is required.

## Benefits of Using Conversica

- Engages more prospects, generates more sales appointments and ultimately more closed-won deals than a human team alone.
- Saves time and enables better sales team focus by letting sales reps focus on prospects with actual interest and intent to buy.
- Gathers critical info such as phone numbers, best times to call, objections, purchase considerations or constraints and intent to buy.
- Improves the sales process by following up with prospects to validate their satisfaction with sales.
- Gets emails into the inbox not the spam folder because the assistant's emails and texts look just like one-to-one messages sent by humans, not by marketing systems.

## Works with Your Sales Team

Conversica makes great sales teams better by freeing them to do the job for which they were hired. Rather than trying to reach leads, salespeople have quality conversations. When they call, the prospect answers since they agreed to the meeting. With visibility to the assistant's conversations, the sales rep is more prepared to discuss specific needs and answer questions.

## Works with Marketing and Sales Tools

Marketing automation solutions such as Marketo, Pardot, HubSpot and Eloqua rev up the demand-generation engine. CRM applications such as Salesforce clear the track for smooth, efficient sales management. Time-consuming manual lead engagement downshifts the sales process just at the moment sales reps are ready to take off. Adding Conversica keeps the sales cycle moving: reps touch more leads more efficiently, and prospects convert to buyers more quickly. Conversica also allows companies to make the most of their investment in lead acquisition. The more you're spending on finding leads, the more important it is to make sure that no lead is left behind.





# About Conversica

Conversica is the only provider of AI-driven lead engagement software for marketing and sales organizations. Conversica's AI Assistants, powered by artificial intelligence technology, automatically contact, engage, nurture, qualifies and follow up with leads via natural, two-way email conversations. Conversica's solutions are offered as cloud-based, software-as-a-service subscriptions priced at a variety of tiers to meet specific needs.

To learn more about how Conversica can drive lead engagement forward, call +1 (888) 778 1004, email [sales@conversica.com](mailto:sales@conversica.com) or visit [conversica.com](http://conversica.com) to request a product demonstration. You can also follow us on [LinkedIn](#), [Facebook](#), [YouTube](#), and at [@MyConversica](#) on Twitter.



*"This has been hugely successful for us. Conversica is just phenomenal at engaging people. It's been a phenomenal product for us, and I just love it. Stephanie never calls in sick, never has an attitude. She's super persistent and absolutely consistent."*

- Los Angeles Film School

## Endnotes

<sup>1</sup>Lampertz, Dale. "Has Cold Calling Gone Cold?" Keller Center Research Report. Baylor University. Sept. 2012. Web. 11 July 2015.

<sup>2</sup>"Email Marketing Benchmarks." MailChimp. 1 July 2015. Web. 12 July 2015.





*“Right away, within the first couple of hours of implementing Conversica, the level of lead engagement was like night and day.”*

- Boch Automotive

#### About Conversica

Conversica is the leader in AI-powered business conversations and the only provider of AI-driven lead engagement software for marketing and sales organizations.

The flagship Conversica® AI Sales Assistant helps companies find and secure customers more quickly and efficiently by automatically contacting, engaging, qualifying and following up with leads via natural, two-way email conversations. Used by more than 1,000 companies worldwide, Conversica's sales assistants are built on a proven AI platform integrating natural language generation (NLG), natural language processing (NLP) and machine learning (ML) capabilities.

Recognized by Gartner as a Cool Vendor, Conversica is a portfolio company of Providence Strategic Growth, Kennet Partners and Toba Capital and is headquartered in Foster City, California.

© 2017 Conversica, Inc. All rights reserved.

Follow us at:

