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Attention is all you Need

AI-Powered Conversations that Unlock Revenue Opportunities

2024 Position^2
Growth Marketing Summit



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History #Lesson on GenAI



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Self-*attention mechanism*

This mechanism allows the AI model to process all parts of the input data simultaneously (*in parallel*), rather than sequentially.

It also enables the model to focus on different parts of the input sequence and *understand the relationships between them, regardless of their position in the sequence*.

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Nov 30

OpenAI's ChatGPT, powered by GPT-3.5 (an improved version of its 2020 GPT-3 release), becomes **the first widely used text-generating product**, gaining a record 100 million users in 2 months

Dec 26

LLMs such as **Google's Med-PaLM** are trained for specific use cases and domains, such as **clinical knowledge**

Feb 2

Amazon's multimodal-CoT model incorporates "chain-of-thought prompting," in which the model **explains its reasoning**, and outperforms GPT-3.5 on several benchmarks

Feb 27

Microsoft introduces **Kosmos-1**, a multimodal LLM that **can respond to image and audio prompts** in addition to natural language

Mar 7

Sales
Einst
Open
gener
custo
mana

2022

2023

Dec 12

Cohere releases the **first LLM that supports more than 100 languages**, making it available on its enterprise AI platform

Feb 24

As a smaller model, **Meta's LLaMA** is **more efficient** to use than some other models but continues to peform well on some tasks compared with other models

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Mar 7

Salesforce announces **Einstein GPT** (leveraging OpenAI's models), the first generative AI technology **for customer relationship management**

Mar 13

OpenAI releases **GPT-4**, which offers **significant improvements in accuracy** and hallucinations mitigation, claiming 40% improvement vs GPT-3.5

Mar 14

Anthropic introduces **Claude**, an AI assistant trained using a method called "constitutional AI," which **aims to reduce the likelihood of harmful outputs**

Mar 16

Microsoft announces the **integration of GPT-4 into its Office 365 suite**, potentially enabling broad productivity increases

Mar 21

Google releases Bard, an AI chatbot based on the LaMDA family of LLMs

Mar 30

Bloomberg announces a **LLM trained on financial data** to support natural-language tasks in the financial industry

April 13

Amazon announces **Bedrock**, the first fully managed service that **makes models available via API from multiple providers** (eg, Anthropic) in addition to Amazon's own Titan LLMs

2023

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May 2023, **MosaicML** released its **MPT** (Mosaic Pretrained Transformer) models, which included MPT-7B variants like Base, Instruct, Chat, and StoryWriter. These models, which were downloaded over 3.3 million times since their launch

July 2023, **Meta** introduced **Llama 2**, an open-source large language model, available for both research and commercial use. This release was a significant advancement in Meta's AI efforts & reinforced the importance of open-source in AI technologies.

August 2023, **StabilityAI** released **StableLM v2**, a significant advancement in their series of language models. This model, Stable LM 2 1.6B, is a compact 1.6 billion parameter language model trained on multilingual data.

December 2023, **Deci** introduced **DeciLM-7B**, a groundbreaking 7-billion-parameter LLM. DeciLM-7B set new benchmarks in the AI field, achieving top scores on the Open LLM Leaderboard and outperforming other models in its class, such as Mistral 7B.

September 2023, **Alibaba Cloud** announced the release of **Qwen-VL**, a large vision language model open to the public.

November 2023, **01-ai** released a series of large language models named **Yi,** developed entirely from scratch by their team.

June 2023, **Salesforce** released **X-GEN** - a series of LLMs with an ability to handle massive volumes of high-quality data. The models were trained on a colossal scale.

Falcon LLM, developed by **TII** in Abu Dhabi, is a foundational large language model with 40 billion parameters. It was trained on one trillion tokens & notable for its efficient use of training compute

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Going further back in time

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2010+, The concept of **attention in computing and neural networks** has been explored in various forms for decades, but it gained significant momentum in the 2010s, particularly with the introduction of **neural attention mechanisms in deep learning models**.

Google Brain initial success was demonstrated through the development of large-scale deep neural networks, notably the famous **cat recognition experiment** in **2012**, where a **neural network trained on a dataset of YouTube videos**

The earliest and **most influential works in the context of modern deep learning** was the paper "Neural Machine Translation by Jointly Learning to Align and Translate" by Dzmitry Bahdanau, Kyunghyun Cho, and Yoshua Bengio, published in **2014**, **University of Montreal**

Google's Pathways Language Model (**PaLM**) marked a significant milestone in the evolution of large language models (LLMs). PaLM was officially unveiled on **April 4, 2022**, and represents a leap in the capabilities of LLMs, with **540 billion parameters** making it one of the largest models at the time of its announcement.

Success of attention-based models in machine translation led to a rapid expansion of the concept across other NLP tasks and even beyond, into areas such as computer vision, speech recognition, and multimodal interaction. The beginning of the GPT era began with the **transformer model**, introduced by Vaswani et al. in **2017.** Introduced in the seminal paper **"Attention is All You Need"**, this work was led by Ashish Vaswani along with other researchers at **Google Brain**, including Noam Shazeer, Niki Parmar, Jakob Uszkoreit, Llion Jones, Aidan N. Gomez, Łukasz Kaiser, and Illia Polosukhin.

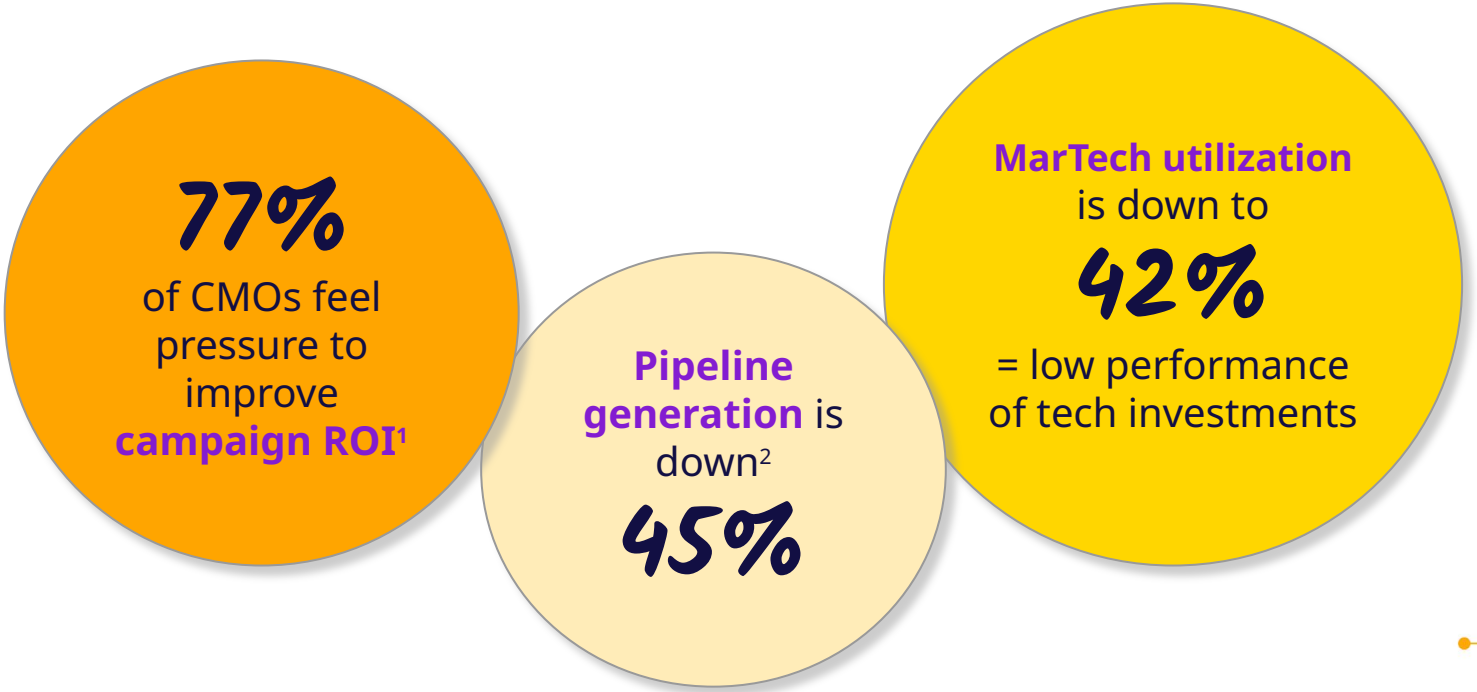
Where GPT Originated

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Why do we, Marketers, #giveAshIt?

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Financial Pressures Continue for Revenue Leaders



Sources: 1. LinkedIn 2. Ebsta & Pavilion 3. Gartner

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Requires Keeping Pace With **Changing Expectations**

Buyers are In Control

70%

of the B2B buyer's journey is completed **before sales is engaged**[1]

80%

of B2B interactions will occur via **digital channels** by 2025[2]

Experience is King

72%

of buyers ***only*** engage if messages are **customized to their interests**[3]

80%

of buyers expect **real-time communications**[2]

AI Tech is Maturing

95%

of all consumer interactions will be **facilitated via AI** by 2025[4]

64%

of marketers **use AI today,** an additional 38% will start using in 2024[5]

Sources: 1. Foleon 2 Convince and Convert 3.SmarterHQ 4.Salesforce 5.Hubspot

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3 Ways to Exceed $Expectations

1 Powerfully Human First Impressions that *Build Rapport* and *Endear Your Brand*

Capture interest in the moment with one-on-one attention that gives your brand the edge over competitors

RESULT

25%

Conversation Rate[1]

2 AI-Powered Conversations that *Active Your Funnel* & *Accelerate Conversions*

Two-way dialog designed to sniff out and actively cultivate opportunities, putting prospects on the fast track to conversion

RESULT

12%

Conversation Qualified Rate[1]

3 Add Two-Way Conversations to *Improve Performance of Existing MarTech*

Amplify and accelerate your existing lead process with integrated triggers that kick off personalized conversations

RESULT

24x ROI

average across all clients[2]

Sources: 1. Conversation Index 2 Total ROI Roll Up Report

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AI-Powered Conversational Engagement Software

Two-way conversations that activate all parts of the funnel with precision, proactively driving conversions and growth

- Ensemble of AI models that provides enterprise-class choice, control & security
- Seamlessly Integrates into lead and customer management processes
- Personalized, highly relevant & multichannel dialog across the full lifecycle

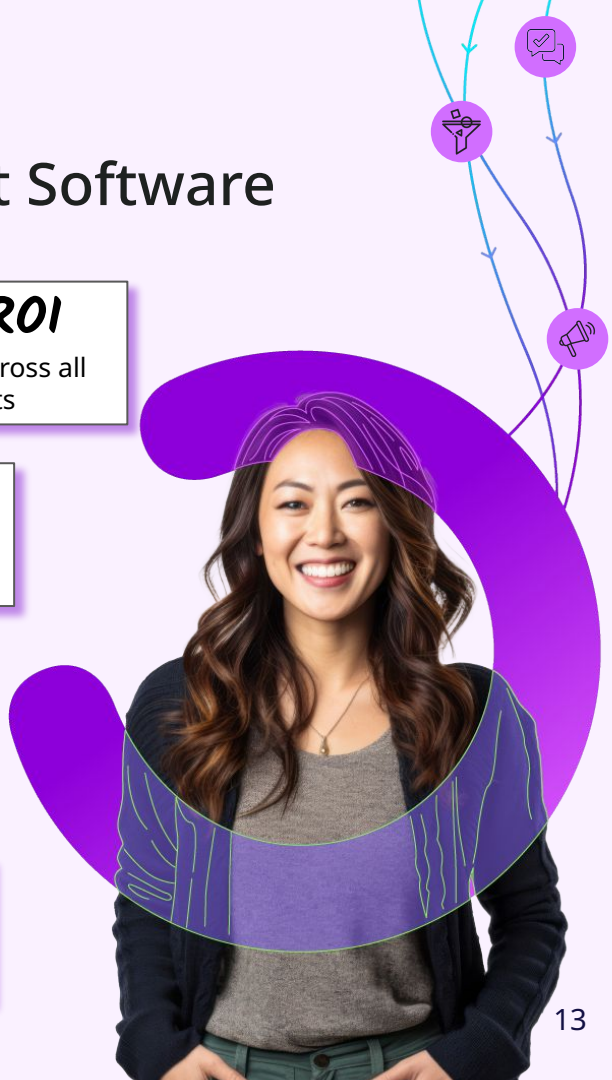
Spanish ~ French ~ German ~ Italian
Portuguese ~ Japanese ~ and more

24x ROI
Average Across all Clients

25%
Avg Conversation Rate across all skills

>$10 Billion
Opportunity Revenue Generated

1.2 Billion
Interactions



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Who Cares?

B2B Marketing with AI by Industry Leaders

Technology

ORACLE · servicenow · Hootsuite · ZOOM · cisco · hp · Leica Geosystems

Telecom

AT&T · T-Mobile · ooredoo · Gamma · VONAGE

Manufacturing

EPSON EXCEED YOUR VISION · HARDINGE · PROTOLABS Manufacturing. Accelerated. · Rockwell Automation · EMBRAER

Business Services

HTC GLOBAL SERVICES · Martindale Hubbell · AUTODESK · Unity · IRON MOUNTAIN · IHS Markit · hibu

Automotive

LITHIA · Sonic Automotive · Holman · ASBURY AUTOMOTIVE GROUP · PENSKE Automotive · Faulkner TO BE SURE · Larry H Miller Dealerships

Sports & Media

Sacramento Kings · Orlando Magic · Washington Wizards · Minnesota Timberwolves · Boston Red Sox · Phoenix Suns · Mets · Washington Capitals · Detroit Red Wings · Charlotte Hornets

Education

Pearson · LSU · Arizona State University · CONCORDE CAREER COLLEGES

Health & Wellness

HENRY SCHEIN ONE · Little Rock Athletic Club · VIDA FITNESS · MEDQOR · the Y

G2 Leader FALL 2023 · G2 Best Support Enterprise FALL 2023 · G2 High Performer FALL 2023 · G2 Easiest Setup FALL 2023 · G2 Easiest Admin SUMMER 2023 · G2 Easiest To Do Business With SUMMER 2023 · G2 High Performer Enterprise FALL 2023

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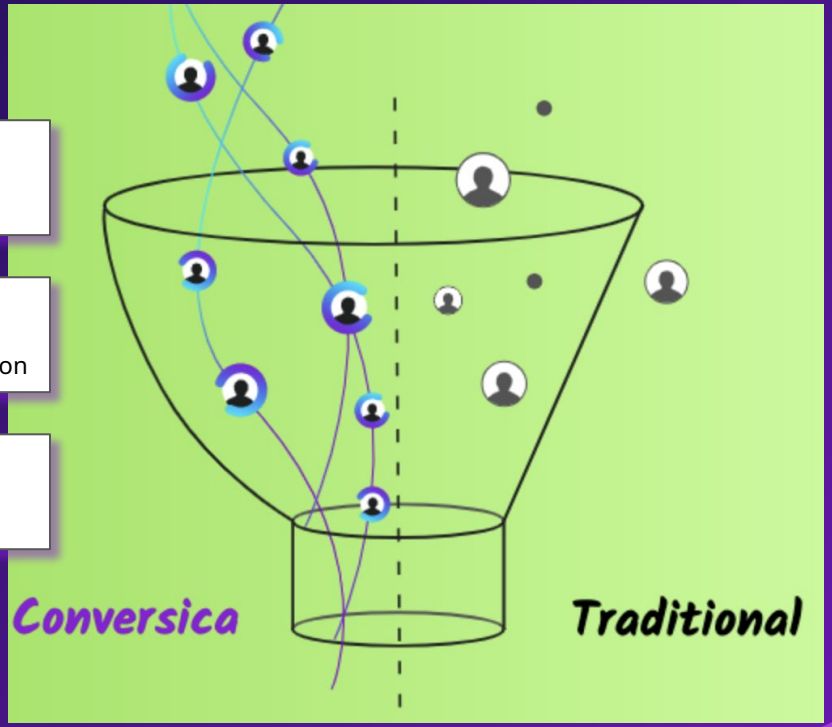
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AI Puts You in the Conversion Fast Lane

100%
lead follow up

500%
higher lead conversion

10x
pipeline



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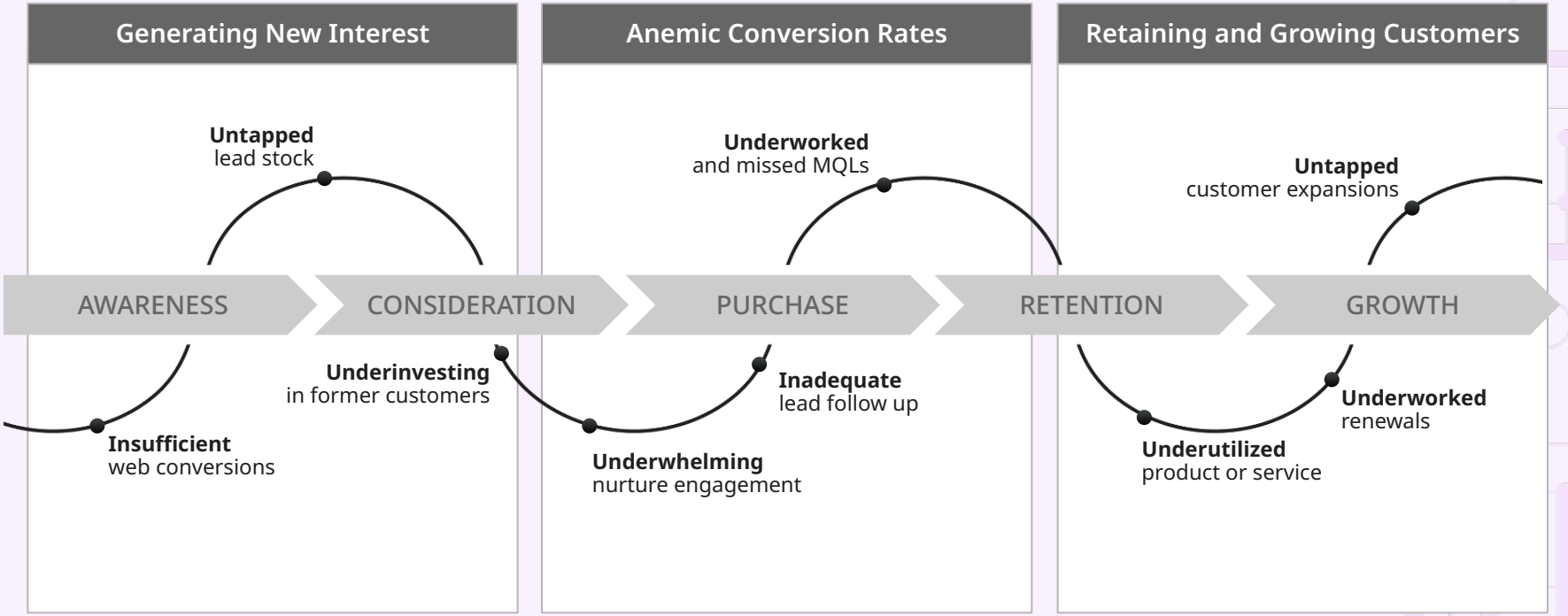
How Can #AI Help You?



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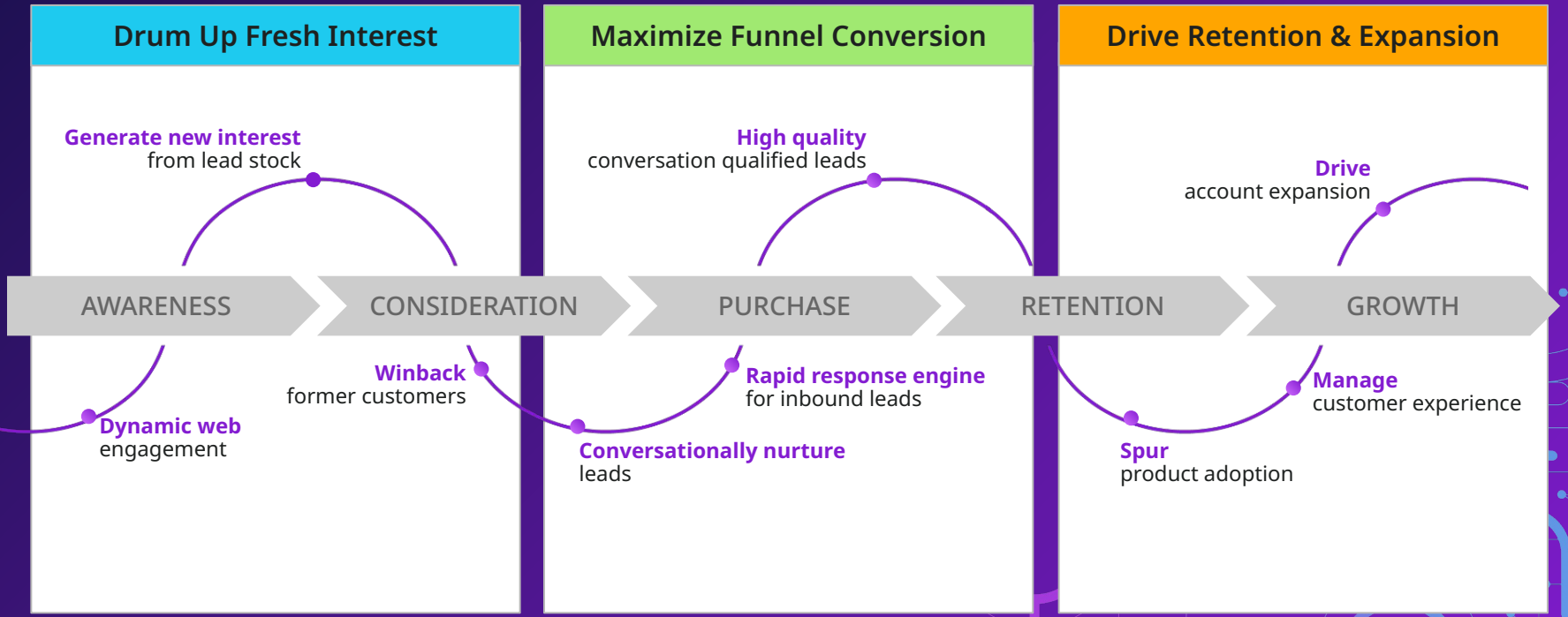
What Challenges Are You Facing?



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Attention that Results in Finding & Converting Revenue Opps

Replace Revenue Team Activities with AI Automation



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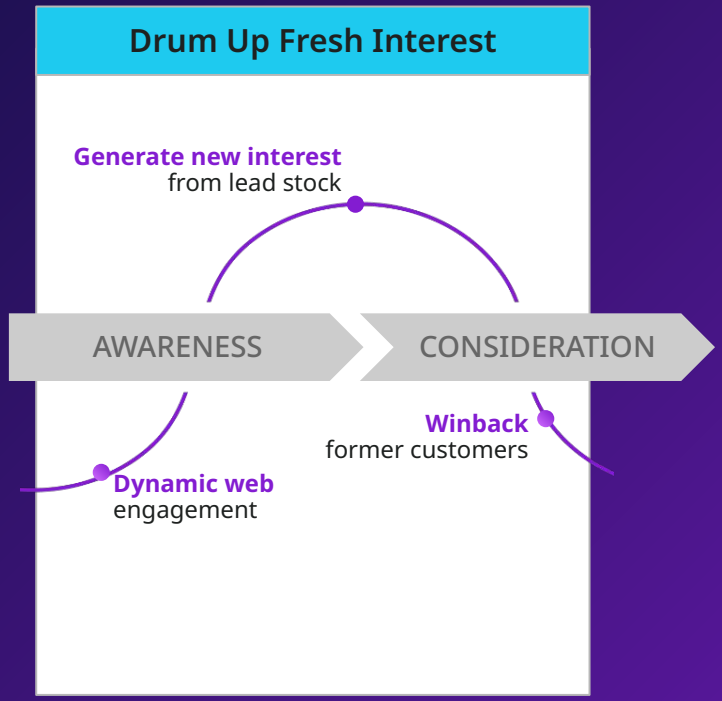
The AI Automation Value Curve

Optimized for Maximum Impact

	Inbound High Quality Leads	Outbound High Volume Leads	Expansion Grow Accounts	Brand X Create Advocates
Highest Impact Use Cases	• Prompt Follow-up • Improve Quality • Conversationally Nurture • No Lead Left Behind	• Cold/Warm Accounts • Account Based outreach • Winback **Inbound**	• Upsell • Renew • Spur Adoption **Outbound** **Inbound**	• Drive Health • Referrals & Case Studies • Onboarding **Expansion** **Outbound** **Inbound**
Key Components	• MAP Integration • Embedded in Lead Mgmt and Workflow • Automatic Activity Triggers	• CRM Integration complements SEP • Strategic Account Tiering • Campaign/Account Insight triggers	• CSP Integration • Embedded in Core Growth Motions • Triggered or Campaign-based	• CSP Integration • Embedded in Acct Mgmt • Automatic Account and Contract Triggers
Expected Outcomes	• 12% Conversation Qualified Rate • 5 days from online interaction to hand raiser	• 10% Opp Conversion Rate • Double outbound efficiency	• 25% Conversation Rate • Up to 12% Opportunity Conversion Rate	• Competitive Brand Advantage • Help CSMs Manage Higher Account Volumes

Conversica Creates and Converts New Interest

Scale Personalized Conversations with New and Aged Lead to Uncover Untapped Revenue



Scale Outreach and Follow up

- Turn outbounds into high quality inbounds
- Dual outreach to ABM accounts
- Proactively engage trial prospects

Follow Up on Inbound Leads

- Capture and cultivate leads from webchat
- Engage leads earlier with personalized conversations

Don’t wait on leads to take action - uncover hand raisers

Reenergize Previous Interest

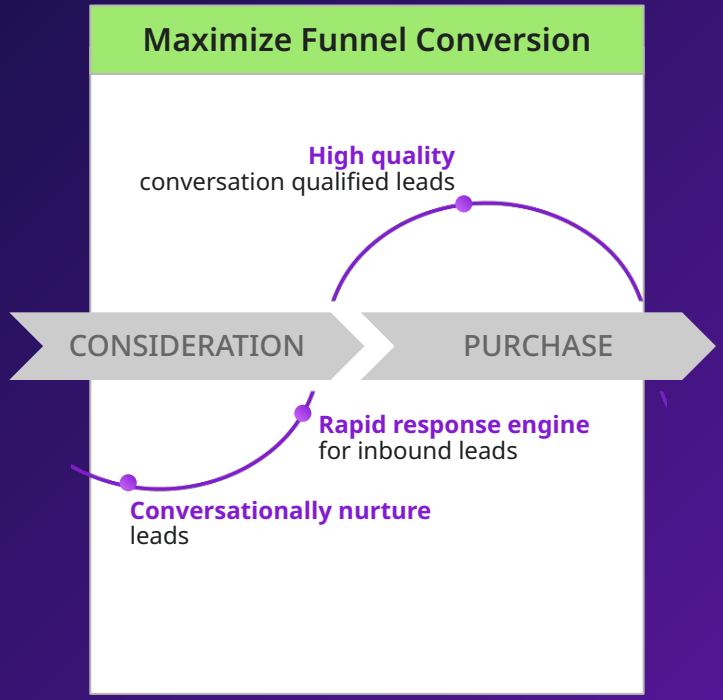
- Recycle and activate leads that have gone cold
- Reactivate accounts with low traction
- Follow up on leads passed to partners

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Conversica Maximizes Funnel Conversions

Reshape Your Funnel to Transform Performance



Follow Up on Inbound Leads

- Capture and cultivate leads from webchat
- Engage leads earlier with personalized conversations
- Don’t wait on leads to take action - uncover hand raisers

Conversationally Nurture

- Confirm interest & validate fit before passing to Sales
- Converse with every lead, not just the ones Sales chooses
- Never let a lead fall through the cracks

Improve Lead Quality

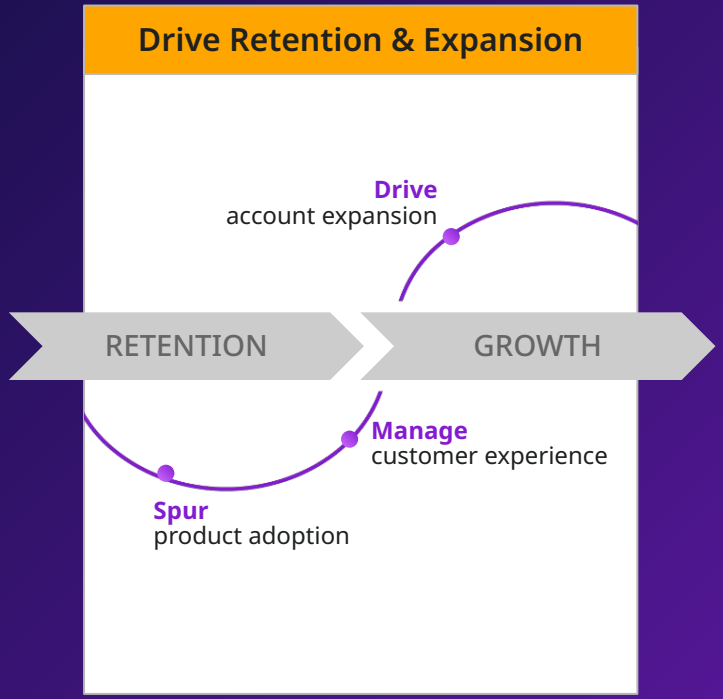
- Confirm interest & validate fit before passing to Sales
- Converse with every lead, not just the ones Sales chooses
- Never let a lead fall through the cracks

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Conversica Sets You Up for Retention and Growth

Helpful Concierge so Customers Get the Most out of Your Product, Making Growth a Snap



Ensure Customers are Happy & Healthy

- Proactively engage & schedule account reviews
- At-risk and low adoption outreach
- Continuously check in and collect feedback on activities

Facilitate Proactive Renewals

- Use account insights to identify and personalize upsell and cross sell opportunities
- Monitor health score, usage & NPS to uncover & address potential issues early, and avoid unexpected churn

Cultivate Adoption & Growth

- Proactive outreach to expand product usage
- Offer customers an onboarding concierge
- Solicit Beta customers

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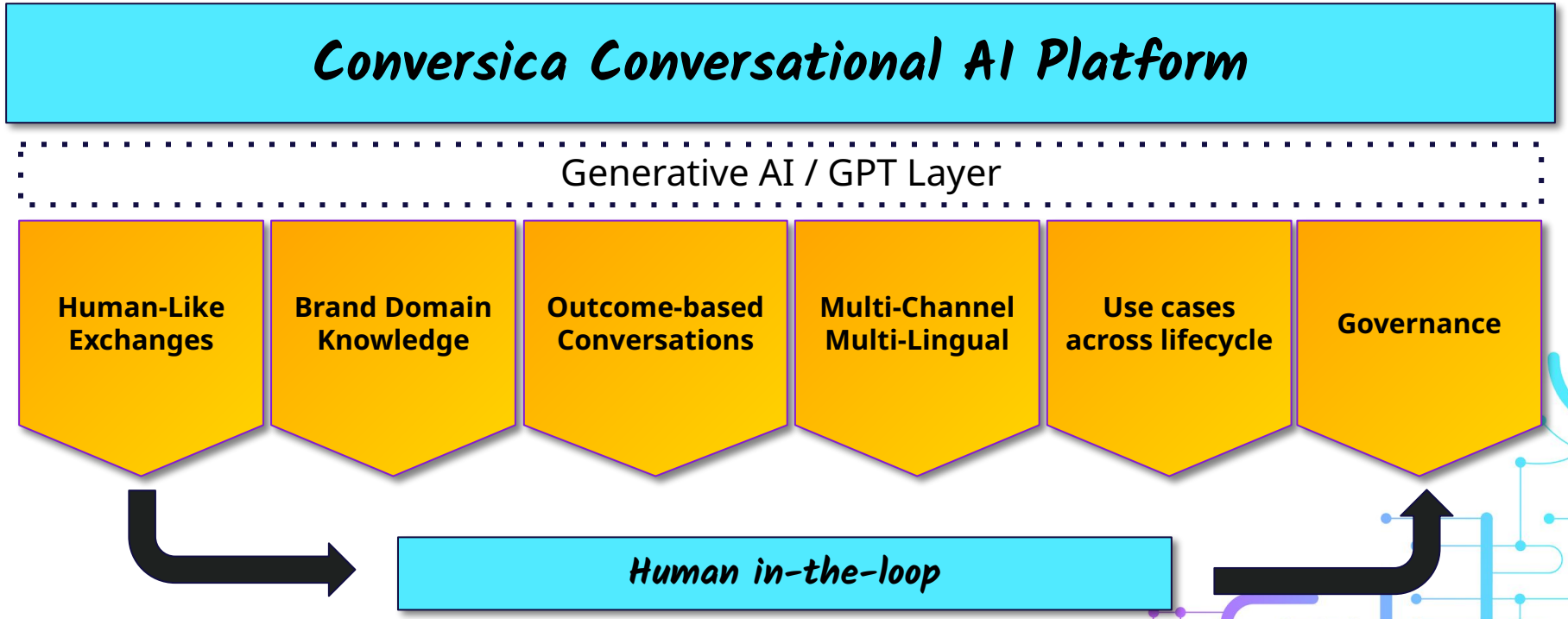
How Does This Conversational AI Work?



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Conversica Delivers the Best Brand Experience

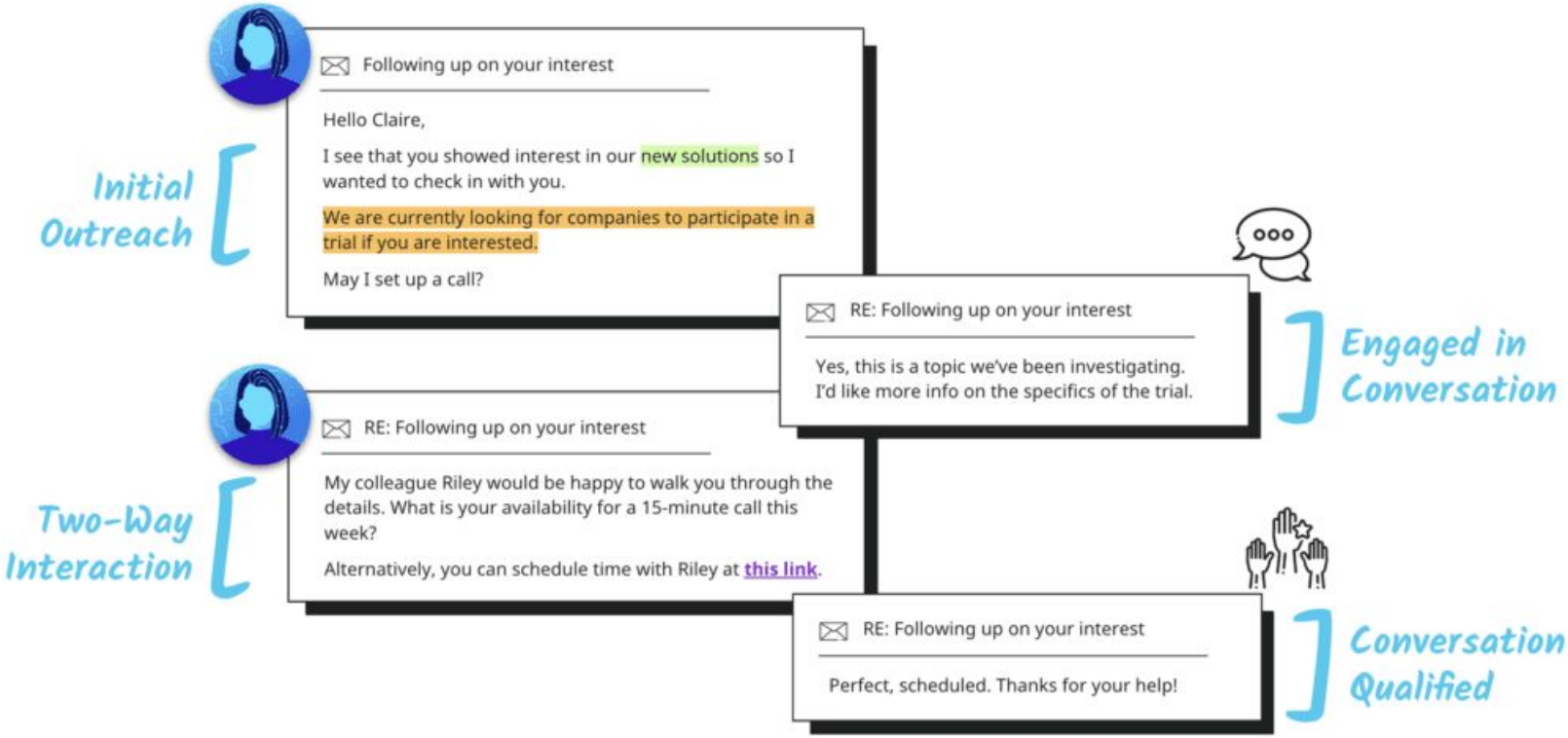
Requires the right components for your applications & use cases



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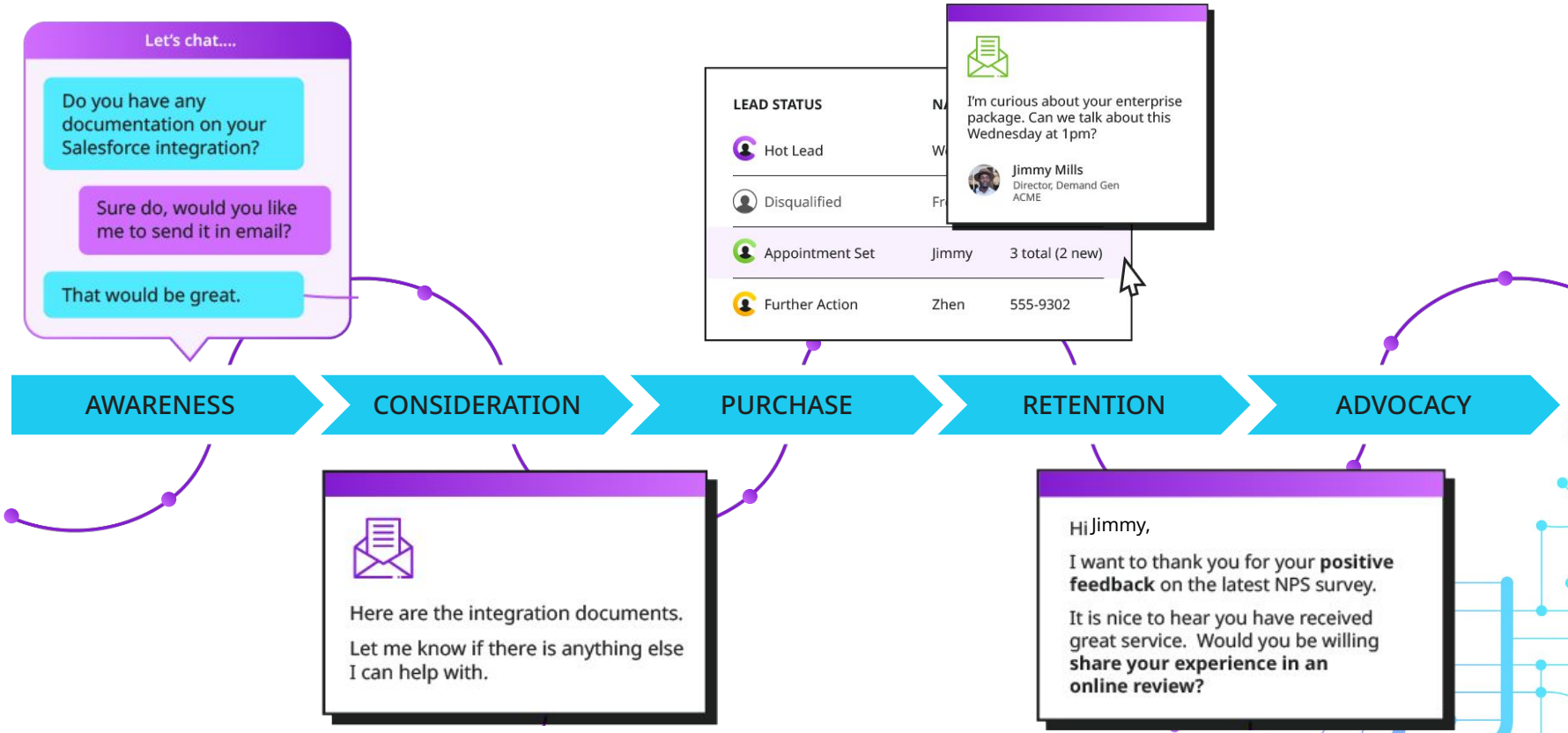
Two-way Conversations Designed to Drive Conversion



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An Experience that *Builds Rapport* Across the Entire Buyer Journey



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How Conversica Works

Operations Team

Identify Use Case
What are you trying to accomplish

Create a List
Static or Dynamic
CRM, MAP, CSV

New Contact Added to the List

Conversica AI Platform

Route Contact
Determine best conversation based on segmentation

Gather Insights
Leverage contact details to personalize the exchange

Start Messaging
Initiates **human-like** conversation to establish **two-way dialog**



Repeated dynamic, personalized, two-way messages

Response is Received
- Interpret Intent
- Take Action & Respond
- Update and Alert

Ready to Talk

Hand Off
Conversation Qualified Contact to appropriate human team member

Automated Follow-up
To ensure contact was was made and the contact is satisfied

Response Not Received
Continues to dynamically generate personalized communications to drive engagement

Attempts Exhausted

Try a Different Tact
Pass contact onto another conversation, stop RDA engagement or pass back to nurture

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Conversational AI Engagement Platform

Revenue Digital Assistants

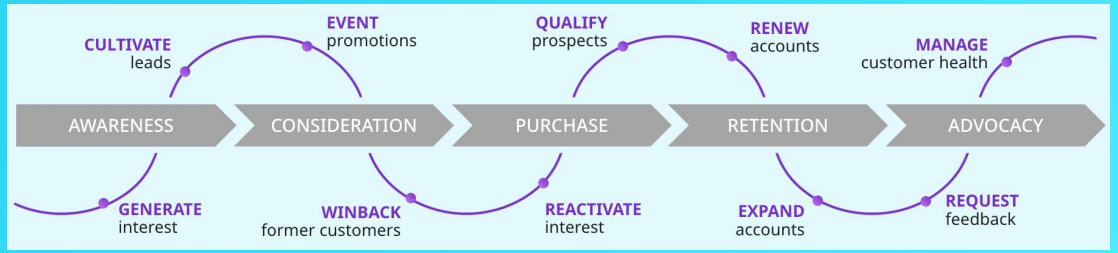
Powerfully Human conversations that put prospects on the fast track to conversion. Highly relevant, multichannel dialog that uses existing insights to influence and persuade.



Multi-lingual

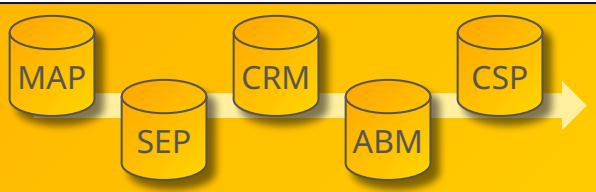
Skills and Capabilities

Skills Library with over 1K pre-built and optimized conversations tailored to the most common use cases.



Insights and Actions

Seamlessly integrating with existing tech stack; retrieving & actioning lead and account data from existing systems and returning insights collected



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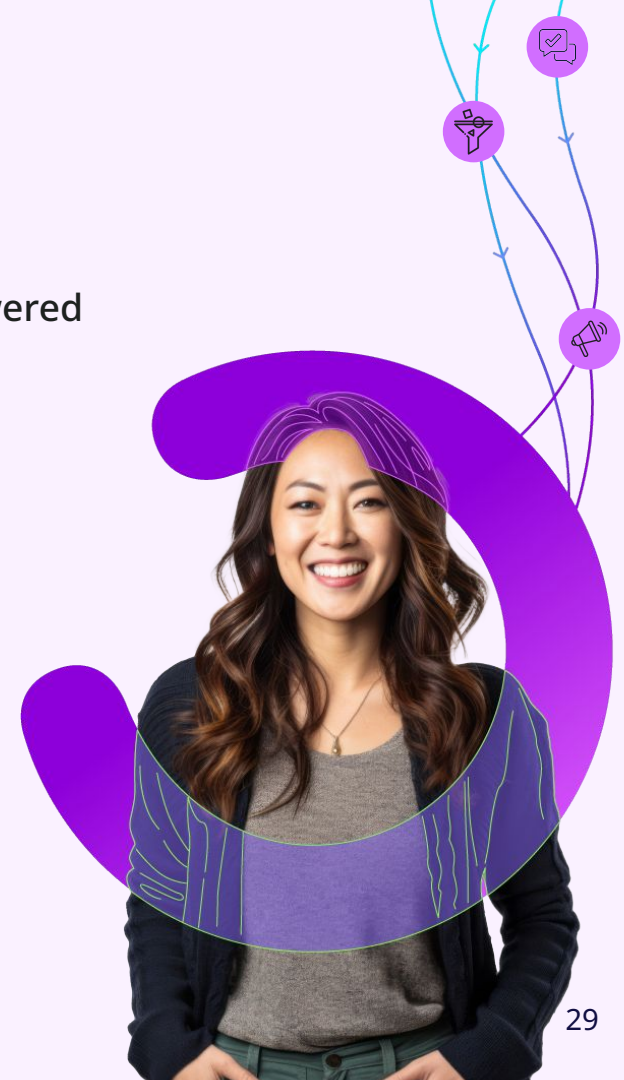
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The Conversica Difference

Get in the Conversion Fast Lane with Conversica.

Scalable solution to attack your funnel proactively with AI-powered two-way conversations optimized influence and persuade unlocking untapped revenue

- ✓ Enterprise-class solution that uniquely **blends multiple private & public AI models and brand-specific information** to dynamically generate authentic and responsive two-way dialog
- ✓ Real-time engagement **across the entire customer lifecycle** proactively advancing contacts through THEIR journey
- ✓ Always knows the next best step to take, **moving conversations seamlessly across channels and languages** according to user preference
- ✓ Robust integration ecosystem takes advantage of all available **insights and automatically triggers** appropriate conversations via standard business processes



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Q&A



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Explore Conversica Use Cases

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Follow-up on Inbound Leads

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AI-powered Rapid Response Engine to Boost Conversion

Authentic, two-way conversations that drives quick conversion

So you can respond quick, with personalized follow-up at scale



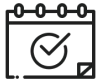
Don’t Let Slow Responses Result in Missed Opportunities

Instantly engage using the lead data and actions to start a helpful & relevant conversation



Stop Guessing if a Lead is Sales Ready, Ask

Hyper-personalized conversation to quickly assess where the lead is in their journey



Never Let a Lead Age Prematurely

Upto 12 attempts to capture leads that are slow to engage with automatic follow up at 30, 60 or 90 days



Not Another Tool To Manage, Seamless Part of Lead Process

Trained to follow rules of engagement, account tiering, scoring thresholds and any other business consideration

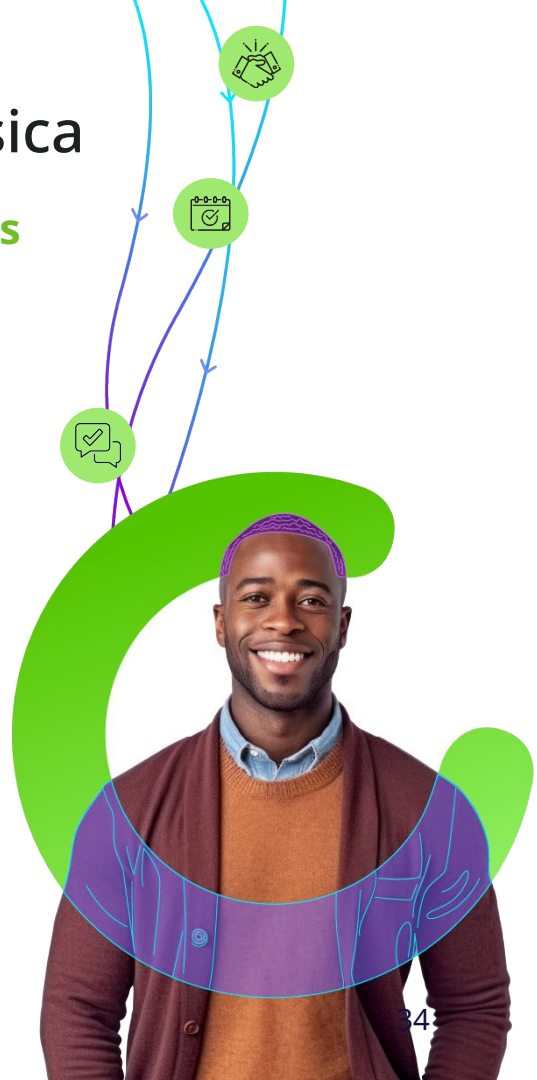
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Transform Inbound Conversions with Conversica

Timely, Hyper-personalized Powerfully Human Conversations

- Seamless engagement across channels, carrying context and drive toward a desired business outcome
- Uses lead and account insights from a variety of sources to segment, tailor and personalized each exchange
- With over 50 intent models, Conversica can understand complex responses with a 98% accuracy
- Integrates and automates triggers and actions within the existing lead management process



25%
Conversation Rate

5 days
New Lead to Opp

12%
Conversation Qualified Rate

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RDAs Converse With Every Inbound Lead

Quickly assess readiness and route appropriately

New Inbound Interest

Form Fill
Content Syn
Demo Request
Event Attendee



Two-Way Conversation

- Immediate Follow up
- Personalized with Context
- Provides Helpful Resources
- Assess Sales-readiness

Ready for Sales?

✔ Conversation Qualified



Passed To Sales

- Interest and Fit Confirmed
- Meeting Scheduled
- Pre-qualification Questions Answered

✗ Not Quite Ready



Try Again

Automatically reach back out after a predefined time frame, taking a new approach to promote dialog

Or



Passed To Nurture

Automatically route to best nurture campaign based on insights collected

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Conversica's RDAs Helped Talend
Scale Follow-up Efforts

"We've been able to touch nearly every inquiry that comes into the business. And that's uncovering incremental, high-quality leads to support the Sales team."

- Adam Benitez, Marketing Operations Manager, Talend

IHS Markit®



ROI

39X

using RDAs for Marketing, Sales, and Customer Success

That's $1 in marketing investment turning into $40 dollars of revenue.

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Conversationally Nurture Leads

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Elevate Nurture with Powerfully Human Conversations

Integrate and automate two-way dialog into existing lead flows

to transform low performing nurture programs



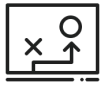
Don’t Wait for Action, Actively Find It

Don’t wait for hand raisers, any interest initiates a conversation to proactively progress them through the funnel



Add Value Without Burden of Another Tool

Embed conversations in the nurture flow, automatically triggering a personalized dialog from your MAP sequence



Complement Programs to Boost Engagement

RDA campaigns designed to complement general nurture communications to increase your chance of engagement



No Missed Opportunities

Trained to follow rules of engagement, account tiering, scoring thresholds and any other business consideration

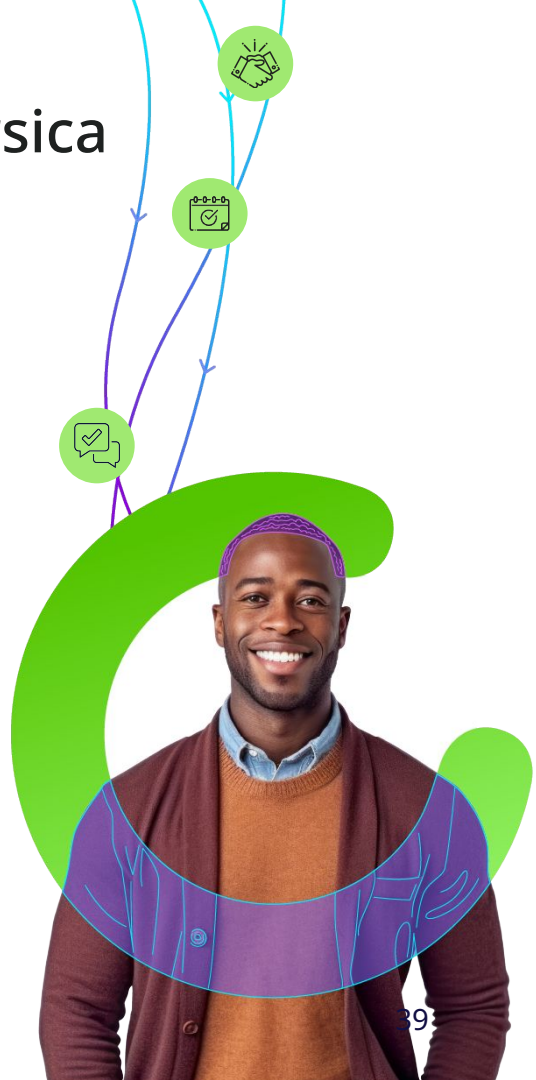
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Add Conversations to Campaigns with Conversica

Integrate Two-way Conversations into Existing Investments

- Easily setup an RDA to automatically deploy *from inside your Marketing Automation Platform*.
- Uses lead and account insights from a variety of sources to *segment, tailor and personalized each exchange.*
- RDAs are empowered to respond to common questions as part of the *natural flow of the conversation*, no human intervention required.
- Choose from a library of over *1K pretrained and optimized conversations.*



24x ROI
Average Across All Clients

300%
Increase in Lead to MQL rate

25%
Conversation Rate

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RDAs Complement Nurture with Personalized Conversations

New interest automatically triggers AI-powered dialog



Nurture Leads

- Newsletters and Updates
- Campaigns targeting lead stock
- New Leads with no engagement

New Interest from Nurture

Open Email
Click on Link
Download Asset
Request Follow up



Automatically Triggers Two-Way Dialog

- Personalized with Lead Actions and Interest
- Quickly Assess Sales-readiness

Ready for Sales ?

✔ Conversation Qualified



Passed To Sales

- Interest and Fit Confirmed
- Meeting Scheduled
- Pre-qualification Questions Answered

✗ Didn't Engage



Reconfirm & Reschedule

Automatically reach back out if Sales don't make contact. Adding persistence, finding the right time to re-engage sales

✗ Not Quite Ready

Passed Back To Nurture

Automatically route to best nurture campaign based on insights collected

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Conversica's RDAs Helped Corelight
Increase the Engagement of Nurture Leads

"Our RDA is a great asset for us—following up on leads in nurture status which allows ISRs to focus on the important MQLs. It's a perfect match."

- Tyler Fields, Senior Director of Growth Marketing, Corelight



corelight

LEAD CONVERSION

12.5%

That's 9x higher than the industry average lead-to-win rate

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Improve Quality of Leads Passed to Sales

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Conversation Qualified Produces the Best Caliber Leads

Confirm Interest and Validate Fit on Behalf of Sales

Clear the Clutter and Reform Your Opportunity Rates



Remove Doubt with Pre-Qualified Leads

xx



Eliminate Missed and Underworked MQLs

RDA follows up a few days later to ensure that the lead connected with the rep. If not, the RDA escalates to ensure the issue is remedied.



Remove and Delays with Pre-Scheduled Meeting

XX



Offer Prospect Insights To Better Prepare for Meeting

XX

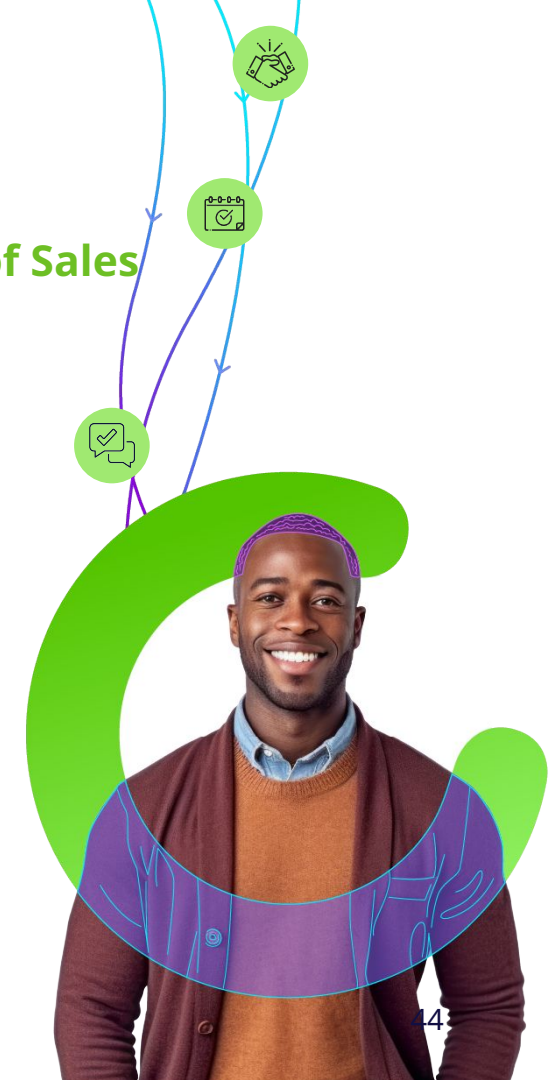
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Why Conversica for Lead Quality

Powerfully Human Conversations to Pre-Qualify on Behalf of Sales

- Use insights from multiple sources to deliver hyper-personalized two-way conversations optimized to drive conversion.
- Provides flexibility to customize Rep assignment rules allow to route contacts based on specific circumstances or situations.
- Action-oriented alerts with required context for seamless handoff to the rep.



12%
Conversation Qualified Rate

300%
Increase in Lead to MQL rate

18%
Opportunity rate

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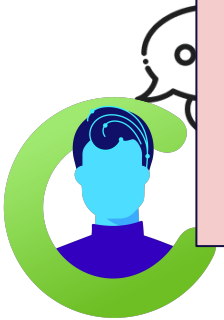
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RDAs Pre-Qualify and Schedule Calls On Behalf of Sales

Confirm Interest, Ask Questions and Convey it all to Sales

New Inbound Interest

Form Fill
Content Syn
Demo Request
Event Attendee



Two-Way Conversation

- Immediate Follow up
- Personalized with Context
- Provides Helpful Resources
- Assess Sales-readiness



Passed To Sales

- Interest and Fit Confirmed
- Meeting Scheduled

UPDATE CONTENT

X Not Quite Ready



Or



Try Again

Automatically reach back out after a predefined time frame, taking a new approach to promote dialog

Passed To Nurture

Automatically route to best nurture campaign based on insights collected

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Platform and Features

Generative AI Strategy

Conversica Chat



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Conversica's *Powerfully Human*® Revenue Digital Assistants™

Unlock revenue through personalized and persuasive two-way conversations



- Authentic conversations that turn leads into customers & grow customers into advocates
- Autonomously execute critical tasks across the lifecycle
- Powerfully Human team members who are
  - ☑ Well trained and constantly learning
  - ☑ Act independently
  - ☑ Adapt to contacts requests
  - ☑ Resourceful, using all available insights
  - ☑ Works well in a team
  - ☑ Delivers consistent results

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RDA *Skills* to Transform Conversions

Skill	Description	Common Uses
CULTIVATE Leads	**Turn warm leads hot. Provide a helpful assistant to guide leads through their journey** *Initiate a personalized conversation based on the contacts action or area of interest. Offer the next logical resource, answer any questions and gauge if the contact is ready to speak to a rep.*	• Segment and tailor conversations based on content engagement, search terms and page visits • Kick off a dialog with contacts that were referred to your org
QUALIFY Prospects	**Immediately engage inbound contacts to validate interest & confirm fit** *The first point of contact to engage prospects who submit a demo request or contact us form, or leads who reach a threshold and become Marketing Qualified Leads.*	• Conversationally qualify prospects with questions to confirm fit and then route appropriately • RDAs collect and confirm the correct information from leads for follow-up
REACTIVATE Interest	**Re-ignite interest, revive your sales funnel, and keep opportunities moving with relevant two-way dialogue** *Don't let your leads age use what you know about their interest to construct a relevant and helpful dialog a warm that lead back up. Target open opportunities that need an extra nudge to progress or help manage the paperwork required in the late stages of a deal.*	• Programmatically engage any MQL or inbound that's gone silent after initial Sales outreach • Segment leads based on last action or interest and provide them with a new, highly relevant asset • Provide a personalized offer or promotion based on historical activities • Follow up with leads that have been transferred to a partner to ensure progression
EVENT Promotions	**Add a special touch with a personal invite to webinars & events and follow up based on engagement** *Don't put the burden on your sales team to personally invite their prospects and customers when you can provide a human-like touch at scale. Segment participants delivering a tailored follow up to keep the conversation going based on their interest level at the event.*	• Solicit questions from registrants before a webinar to increase participation • Segment an event list, inviting ICP accounts to drop by and see a demo • Vary follow up based on actions at event, attend vs visited booth or attended presentation,

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RDA *Skills* to Scale Outbound Motions

Skill	Description	Common Uses
GENERATE Interest	**A personal touch to generate & gauge interest of new or cold leads** *IUse a personal touch to generate & gauge interest with new or cold leads. Initiate a two-way conversation to answer questions & provide a best-in-class experience that builds rapport.*	• Engage former users that have moved to a new organization to gauge interest • Reach out to clients of your partners to explore interest in your solution • Warm up accounts that Sales is not focused on
EVENT Promotions	**Add a special touch with a personal invite to webinars & events and follow up based on engagement** *Don't put the burden on your sales team to personally invite their prospects and customers when you can provide a human-like touch at scale. Segment participants delivering a tailored follow up to keep the conversation going based on their interest level at the event.*	• Solicit questions from registrants before a webinar to increase participation • Segment an event list, inviting ICP accounts to drop by and see a demo • Vary follow up based on actions at event, attend vs visited booth or attended presentation,
WINBACK Former Customers	**Keep an open dialog, expose new value & gauge interest in returning** *Restart the conversation by highlighting new product advancements and customer successes to demonstrate value unique to that account.*	• Use the reason they left to personalize outreach and directly address concerns with recent successes and new features • Target accounts with personalized offers and promotions to incentivize there return
REACTIVATE Interest	**Re-ignite interest, revive your sales funnel, and keep opportunities moving with relevant two-way dialogue** *Don't let your leads age use what you know about their interest to construct a relevant and helpful dialog a warm that lead back up. Target open opportunities that need an extra nudge to progress or help manage the paperwork required in the late stages of a deal.*	• Programmatically engage any MQL or inbound that's gone silent after initial Sales outreach • Segment leads based on last action or interest and provide them with a new, highly relevant asset • Provide a personalized offer or promotion based on historical activities • Follow up with leads that have been transferred to a partner to ensure progression

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RDA *Skills* to Retain and Expand Customers

Skill	Description	Common Uses
MANAGE Customer Health	**Start off on the right foot and maintain a healthy relationship with every customer** *Provide an onboarding concierge to facilitate the process & provide best practices. Regularly engage & maintain an open line of communication with all customers, highlighting account changes, reviewing results, driving adoption & exploring growth.*	• Check in at every step of the onboarding process to offer tips to improve the experience • Schedule account reviews on CSMs' behalf • When a specific product usage metric is declining, start a conversation to learn why • Identify missed onboarding milestones and drive action to keep the process moving
RENEW Customers	**Drive repeat purchases or renew subscriptions by facilitating an easy renewal process** *Avoid unexpected churn by starting a conversation early, confirming details and uncovering issues before they become a barrier to renewal*	• Kick off renewals by verify the point person and contact details then setting a meeting • Notify accounts of discount or promotion expiration to encourage early renewal
EXPAND Accounts	**Drive interest in new products & expansions and guide adoption of new capabilities** *Ensure the product's full value is utilized by driving the adoption of key features & encouraging optimization. Leverage insights to tailor announcements & gauge interest in expansion or to purchase additional products, services or projects.*	• Cross-sell into different buying centers or locations • Facilitate expansion for those reaching capacity limits • Announce and gauge interest in new products • Explore customer interest in participating in a beta
REQUEST Feedback	**Keep a pulse on customers by collecting feedback on a regular basis and find advocates willing to share their experience and refer prospects** *Solicit feedback on recent customer activities. Take action on the results of NPS, product usage, reviews, and surveys, setting meetings to explore issues or encourage reviews from promoters. Continuously mine satisfied customers for shareable stories and new referrals*	• Encourage participation & follow-up on NPS surveys, scheduling meetings with detractors and encouraging online reviews from promoters • Solicit product or beta feedback & encourage reviews • Gauge interest in a written or video testimonial • Reach out to see if your customer is interested in sharing their results during a webinar

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Generative AI is a Strategic Imperative

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Generative AI is a Strategic Imperative

Generative AI solutions are not merely a pursuit of innovation. It's becoming a question of competitive survival.

Enhanced Customer Experience

User expectations have fundamentally shifted - the real-time realistic experience can’t be delivered by human engagement alone any longer.

Operational Efficiency & Scale

Organizations that use AI will exponentially increase efficiency and scale. Those left behind will not remain competitive for long.

Delivery is Key

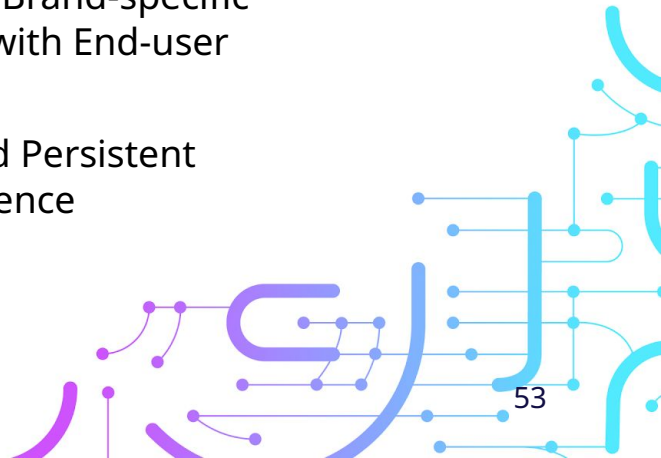
The wrong or bad execution of Generative AI solution can be as perilous as not doing it at all.

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Shifting from Content Creation to Actionable Engagement

Generative AI is longer just a “back office” facilitator, its moved to a “front office” enabler

Generating Content	Generating ***Action***
Content Generated for Human Review and Action	***Autonomous*** Brand-specific Interactions with End-user
Inconsistent and Error Prone Human Engagement	***Accurate*** and Persistent Brand Experience



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Conversica Delivers the Best Brand Experience

Requires the right components for your applications & use cases

Conversica Conversational AI Platform

Human-Like Exchanges	Brand Domain Knowledge	Outcome-based Conversations	Multi-Channel Multi-Lingual	Use cases across lifecycle	Governance
• 2- way conversations & experiences • Remembers you along the way • Can interpret intent of the user	• Filters on brand-sensitive info • Knows offering details inside and out • Learns brand tone and vernacular	• Actively progress leads through the funnel • Driving toward a business objective • Support each step in their journey	• Shift between chat, email and text seamlessly • Human-like engagement on any channel • Languages across key markets	• Drive actions from cultivating leads to renewals • Support Marketing, Sales and Customer Success	• Filter brand-sensitive information • Fact-based answers • Fake news/Hate speech

Human in-the-loop

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Generative AI Power, but with *Brand Controls*

"Public" Large Language Models

(OpenAI)

input

Conversica Shield

"Private" Large Language Model

(Brand-specific)

conversation

intelligence



End-User Experience

- High Accuracy
- No Bias
- No Hallucinations
- Protected Brand Experience

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The Conversica Difference

Balanced Approach to Innovation. Leverage the power of Generative AI to Drive the Best Brand Experience

Conversica- Generative & Brand Safe

- ✓ Variety of AI models tailored to business need and use case
- ✓ Trained on company specific LLMs to deliver brand-specific experiences
- ✓ Deliver Powerfully Human conversations anytime, anywhere
- ✓ Brand-safe, carefully curated LLMs provide enterprise-class guardrails

Other Solutions - Limited & Generic

- ✗ Relies on a single AI model, limiting options and increasing risk
- ✗ Dependent on general LLMs, sacrificing a brand-specific experience
- ✗ Drives a single use case in a single channel vs. an integrated experience
- ✗ Solutions lack tenure for proper governance and control

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AI Accuracy

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Conversica AI Accuracy

Conversica's **98% AI Accuracy** is a result of

Ensemble of AI Models

- Portfolio of models (LLM, Intent, NER, Q&A & Search)
- Includes Open source, proprietary and our own in house models

Extensive Data Set

- 1.2 Billion Interactions
- 10 years of training
- Rich data set including edge cases

Dedicated Training Desk

- Human in the Loop
- Real time Evaluation of responses and feedback
- Offline process to audit the decisions that were made

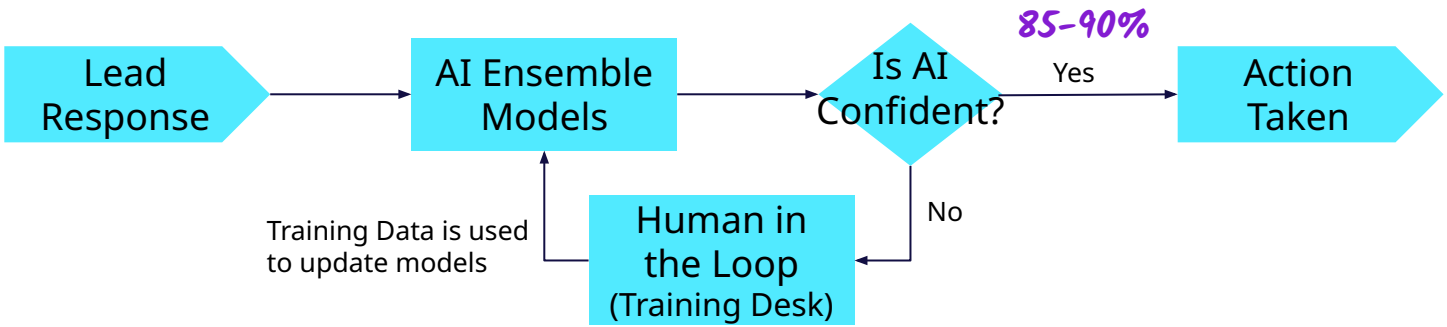
Team of Data Scientist

- Continuously evaluating new technologies and models
- Training and retraining models

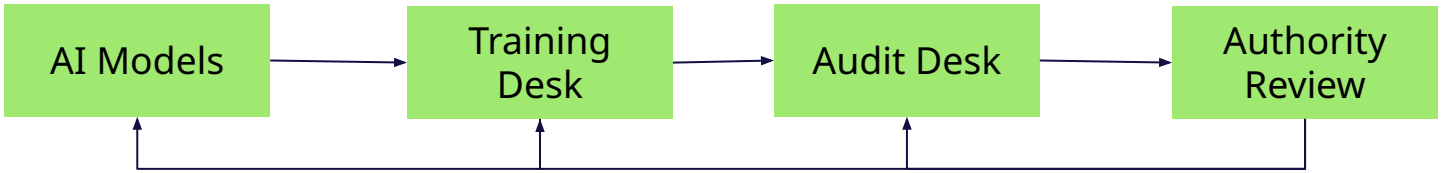
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Conversica AI Model Flows

Real Time AI Flow



Offline AI Training Flow



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Webchat Module

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Web Engagement is Critical, but Experience Matters

Frustration Continues to Grow

30%
websites difficult to navigate

34%
can’t find answers to simple questions

Chatbot the Answer?

67%
prefer self-service over speaking to a rep

82%
instant responses are critical

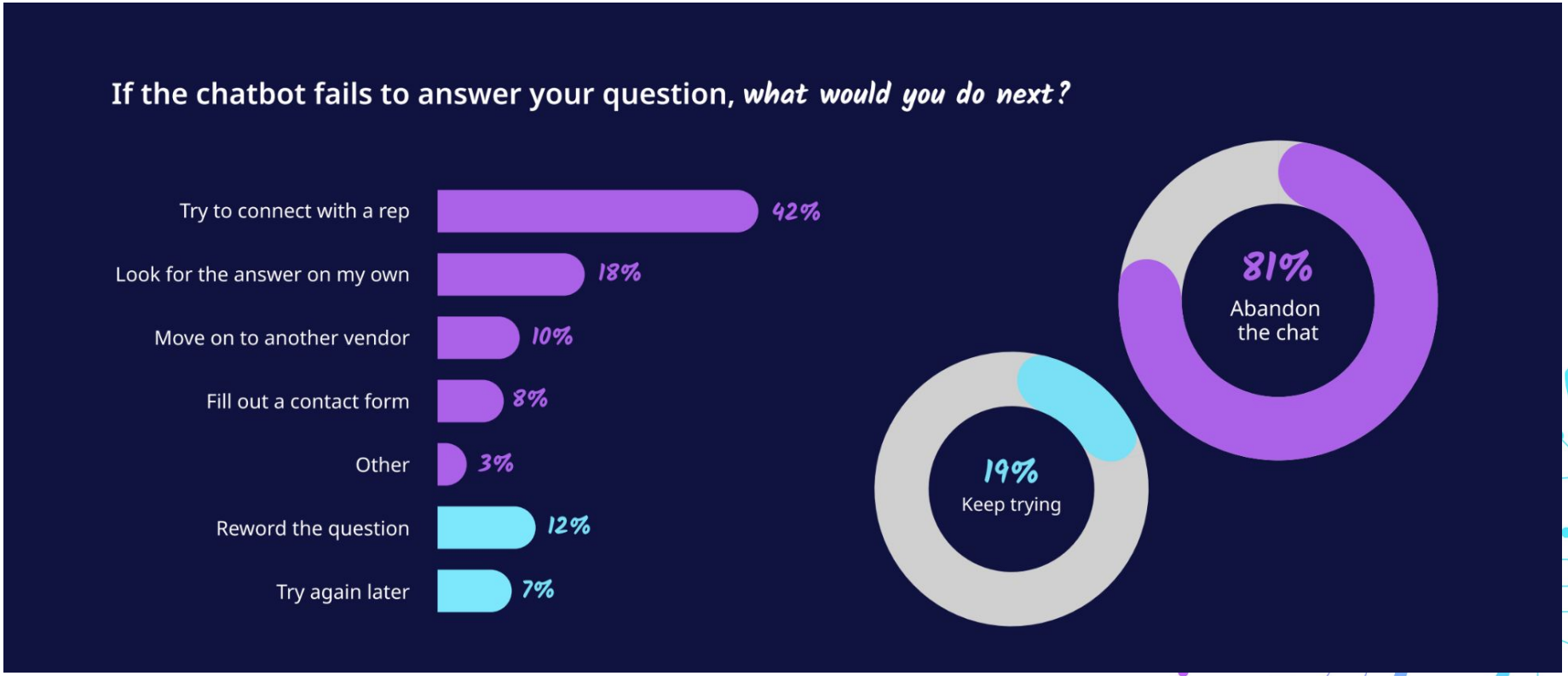
Not if Experience Matters

78%
users are dissatisfied with the service chatbots deliver

73%
won’t use that chatbot again

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Scripted Chatbots: Impact of poor experience



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Source: 2023 Chat Experience Report

AI-Powered Chat is the Answer

Superior Visitor Experience, Less Burden on Reps

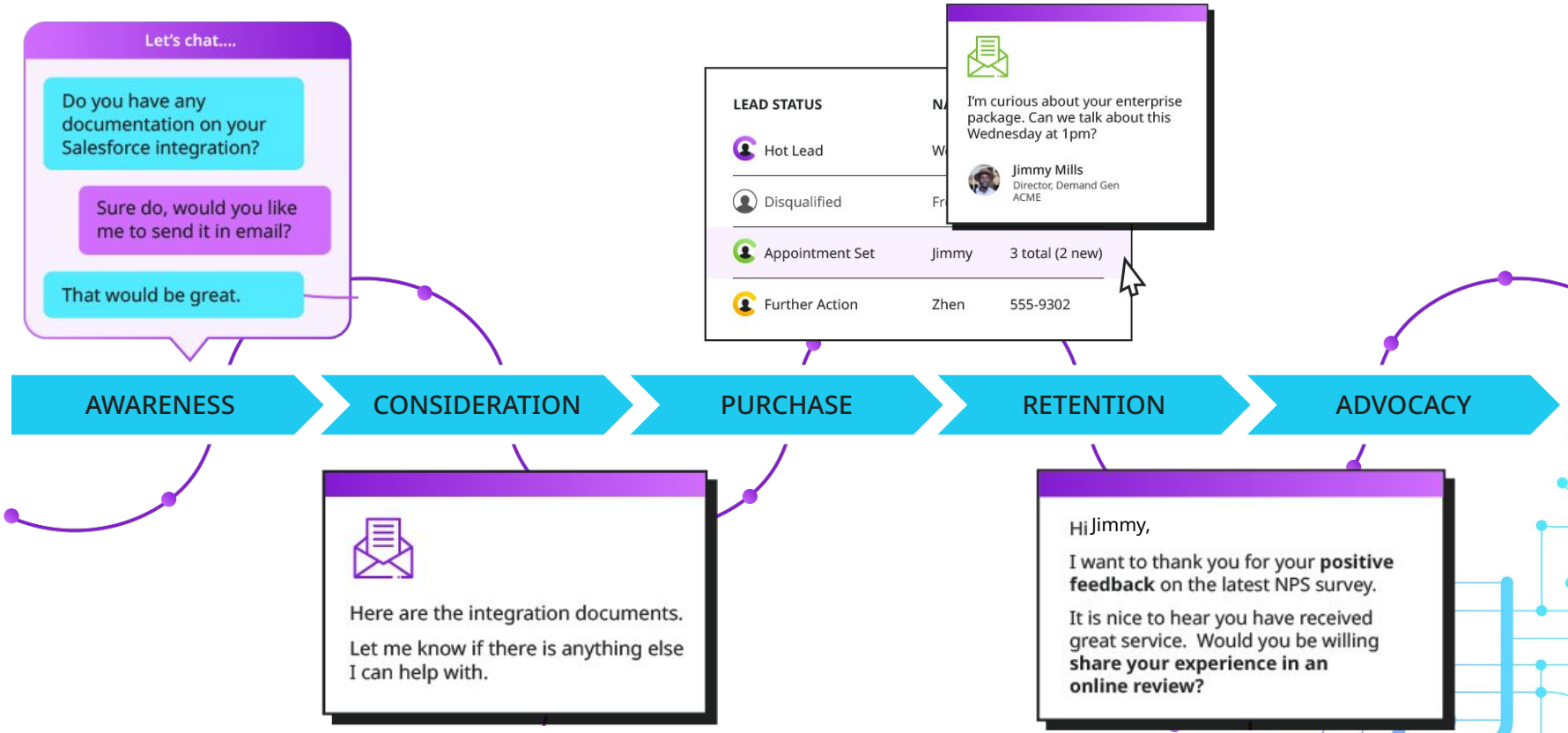
A true AI powered web engagement is:

- Trained to respond quickly to a variety of topics
- Nimble enough to respond to unexpected questions and refocus the conversation back to relevant topics
- Resourceful enough to satisfy the majority of request without relying on reps
- Collects lead data and insights naturally as part of the conversation
- Doesn’t require maintenance of complex workflows, simply define a data set



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An Experience that *Builds Rapport & Differentiates!*

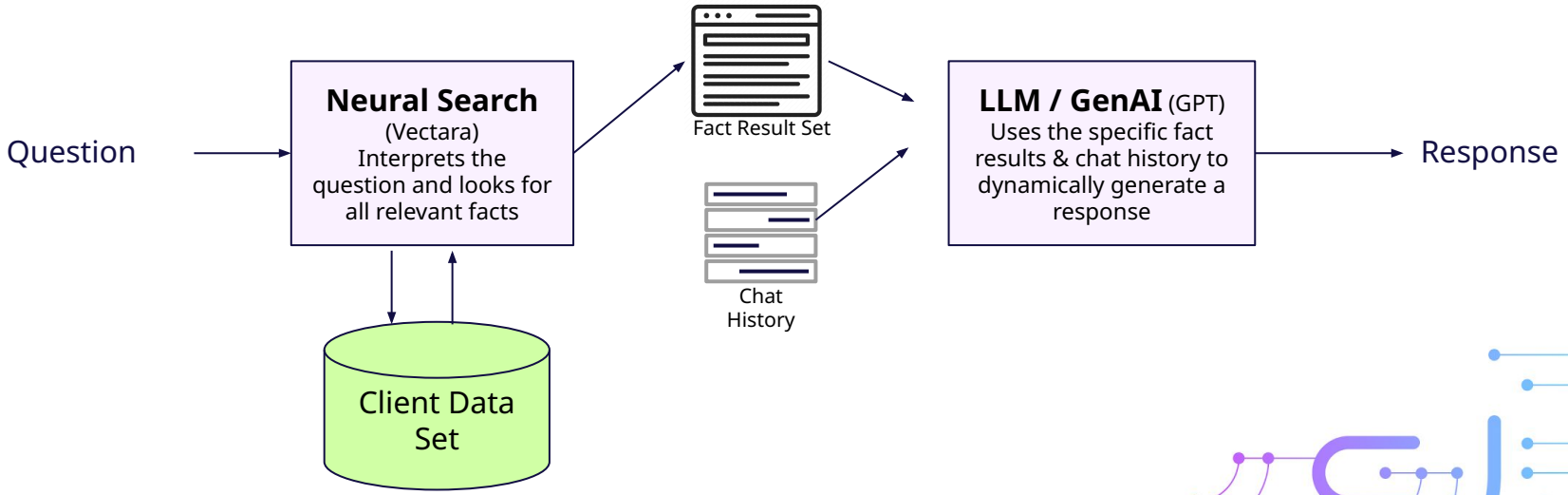


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What is Retrieval Augmented Generation

Retrieval-augmented generation (RAG) is an artificial intelligence (AI) framework that ***retrieves data from brand sources*** of knowledge to improve the quality of responses. This natural language processing technique is commonly used to focus large language models (LLMs) on the most up to date resources and ***respond more accurately to user queries***.



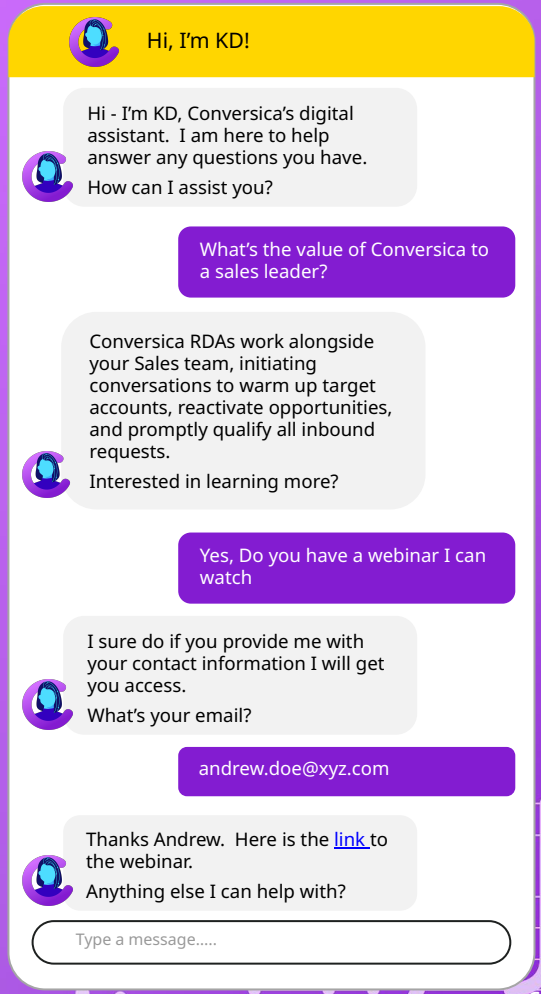
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Announcing Conversica Chat!

What it is: A dynamic, Powerfully Human web engagement experience - powered by both NLU and NLG - to answer just about any question a visitor asks.

Why it's cool: The beginning of the end for the traditional scripted and rigid chatbot solutions. Experience is more important than product in purchase decisions and traditional chatbots simply fall short.



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The Value of Conversica Chat

Superior Visitor Experience, Less Work

Providing a helpful resource to web visitors that supports self-service learning and helps progress visitors through the funnel naturally capturing lead data and insights along the way.

Support Their Journey



Give web visitors an experience that stands out. Human-like dynamic engagement that provides visitors the information and resources they seek, capturing lead data and insights along the way. **Support their journey don't define it** with a scripted or rigid engagement

High Value Can Be Painless



No complex workflows or picklist to set up and maintain. RDAs learn your business and engage with customers on a full range of topics. Simply provide a client specific data set and an RDA can support customers at any stage in their journey with relevant and helpful dialog.

Clear the Clutter



Don't mistake a question with a desire to talk with a rep. Capture lead data and insights to empower an RDA to use all the resources available to them, across channels to **cultivate a prospect until they are ready to take the next step,** focusing sales resources on converting not qualifying.

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The Conversica Chat Difference

Leveraging the full power of AI to improve visitor experience, reduce operations and increase the quality of every lead captured

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- **Harnessing the True Value of AI**
  Fully AI-powered chat - understand the question, find the best answer, dynamically respond.
- **The Conversation Never Stalls**
  Answer “brand’ questions consistently and respond to those unexpected questions with Small Talk.
- **Low Operational Overhead**
  A client specific dataset is all the RDAs need to get started and getting smarter over time.

VS

Other Offerings

- **It’s a Predefined Script**
  Most chatbots don’t use AI at all, it is simply a scripted path to follow.
- **Comprehension Low**
  Works great if visitors follow the “happy path” but veer off script and it’s requires intervention.
- **Time Consuming & Complex Workflows**
  Workflows very time consuming, hard to maintain. & never learning or evolving.

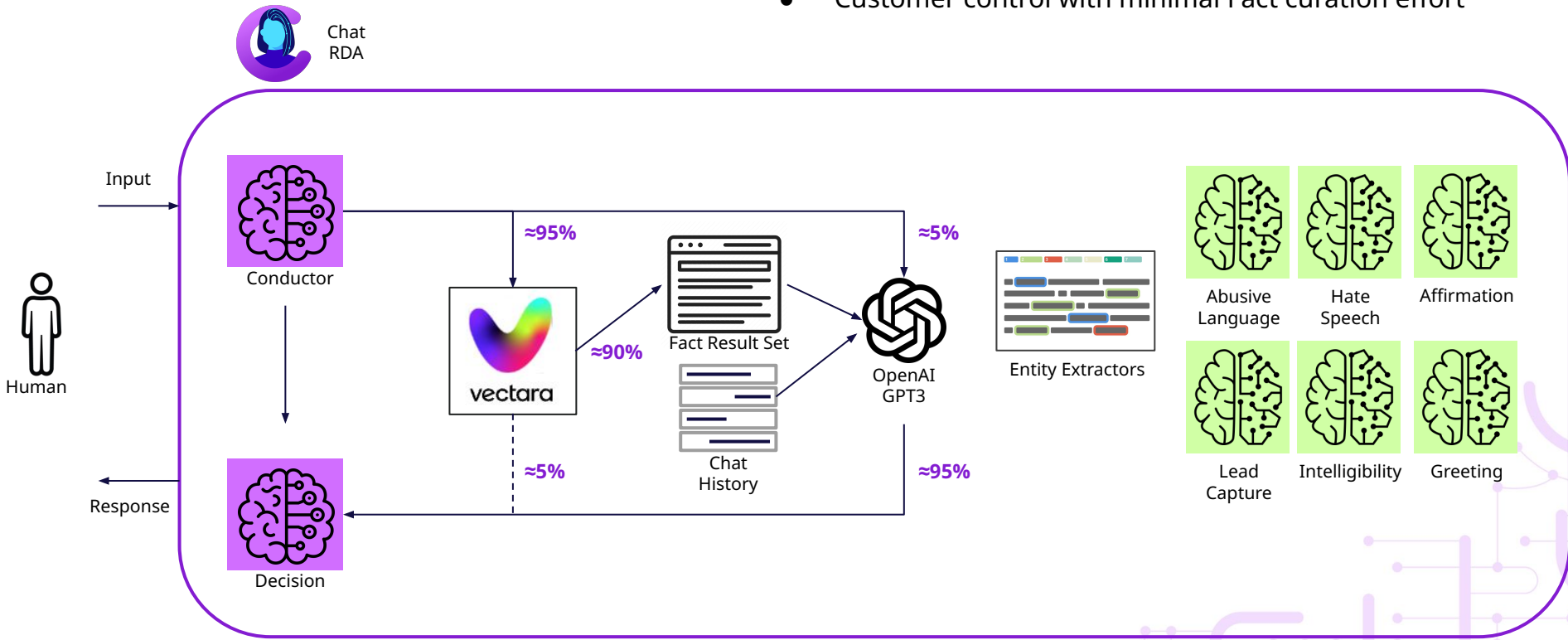
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Chat with RAG Technology

Announce Jan 31, 2024

Retrieval Augmented Generative AI (RAG) Features

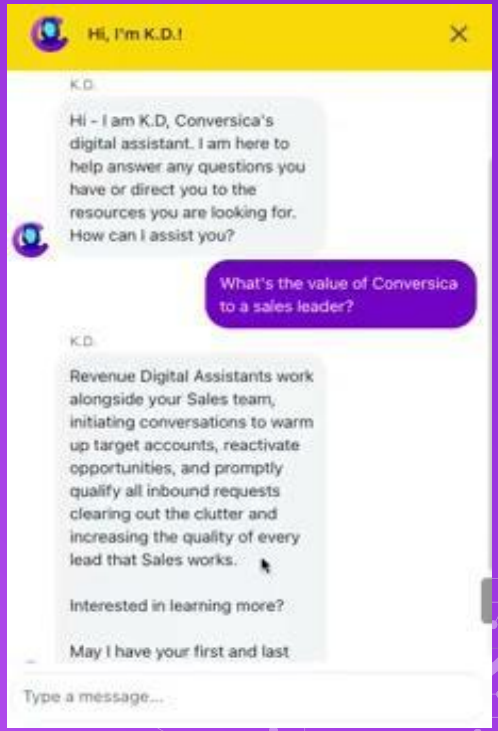
- All of the prior generation plus
- Much more human like interaction
- Customer control with minimal Fact curation effort



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Dumb Chatbot *VS* Conversica Chat





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Platform and Features

- Answers
- Variable Based Conversation Architecture

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Conversation Rate



✉ Following up on your interest

Good morning,

I noticed that you previously expressed interest in our high demand careers in healthcare. I just wanted to make sure you received all the information you were looking for.

The healthcare field is growing and with our frequent class starts and both day and evening classes you could be career ready in as soon as eight months.

Would you like me to help set up a call?

Thank you very much and have a good morning,
Riley

In this example, a Revenue Digital Assistant™ reaches out to a lead referencing their previous interest, and asks if they'd like to take the next step. If the lead responds, the interaction becomes a **conversation**. Auto-responses like out-of-office notices don't count for the Conversation Rate metric.

Conversation Rate **measures engagement** far more reliably than traditional metrics like opens or clicks.

Engaged in Conversation

✉ RE: Following up on your interest

Yes! Thank you.

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Conversation Qualified Rate

Continuing our example, the Revenue Digital Assistant interpreted general interest from the lead and **continues the conversation** by asking for contact information.

When the lead responds to move the conversation forward to a call, they become **Conversation Qualified**.

Conversation Qualified Rate is essentially the **percentage of contacts self-identifying** as ready for the next step.



✉ RE: Following up on your interest

[Rep Name] is happy to help and looks forward to connecting with you.

What phone number would you like us to use?

Best regards and I hope you have a wonderful day,
Riley



✉ RE: Following up on your interest

Call my cell: [Phone Number]

Conversation Qualified

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Conversica Answers

RDAs answer common questions in the course of a conversation - no intervention required

- Our RDAs continuously listen to every conversation, on any channel (email, SMS and chat) so they can quickly identify questions and consult their customer defined facts and respond with the best answer
- Don't burden your reps or drive a contact underground because they aren't interested in talking with a rep yet.

Keep the Conversation Moving



Revenue Digital Assistants help contacts get answers quickly in the course of natural conversation. RDAs provide the help needed while keeping the conversation progressing toward the desired outcome.

Reduce the Burden



Stop using reps to answer common question and engage with contacts before they are Conversation Qualified. RDAs will handle the majority of the request and alert reps when further assistance is needed.

Control the Message



Conversica uses AI to match the question with client defined answers. Clients retain control over responses but have the ability to tailor responses by channel, language, conversation and RDA.

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The Conversica Answers Difference

RDAs human enough to respond to questions during the course of a conversation

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- Smart enough to know when a question is asked, resourceful enough to identify the answer without help
- Answers are tailored to different situations and channels providing the most authentic and relevant exchanges

Other Offerings

- Follow a rigid exchange, if a question is asked it required a human to intervene or worse stops the conversation all together
- One size fits all approach with a standard set of answers - if they have them at all



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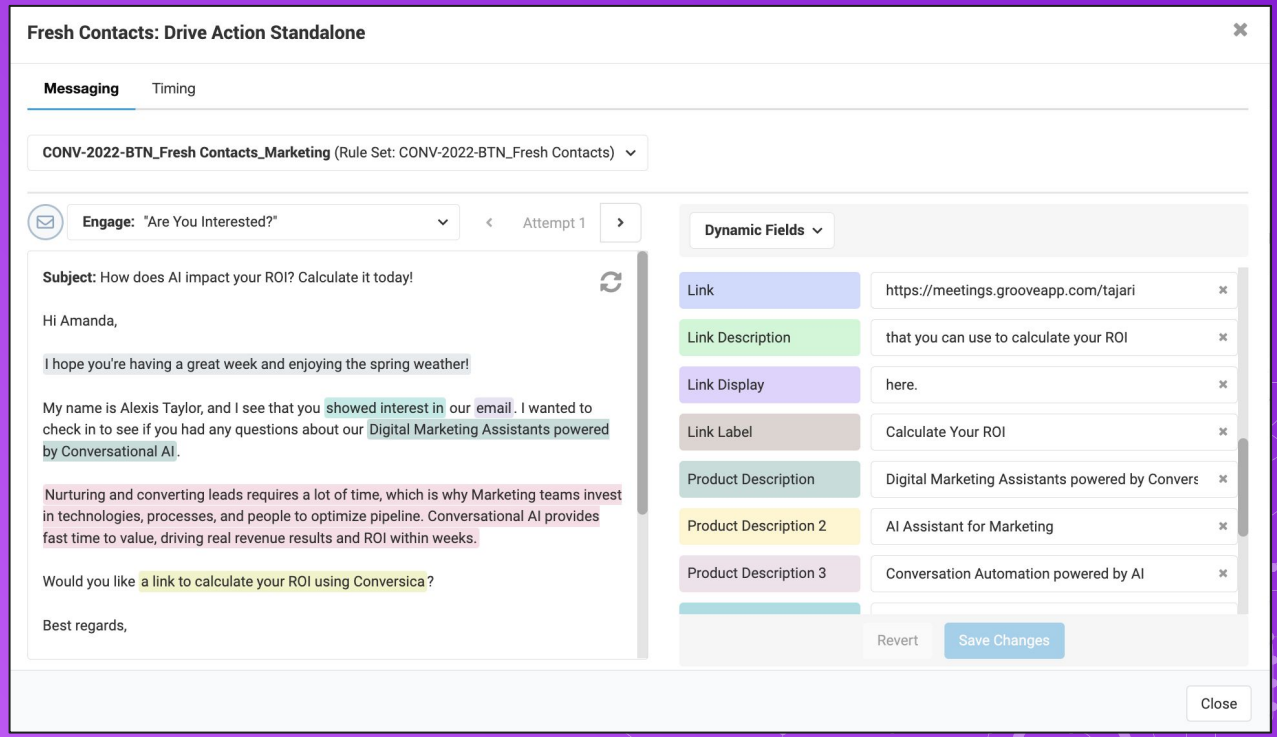
Variable Based Conversation Architecture

Easily customize the message subject and body

Unique, personalized messages, every time

Dynamic message generation

Each set of variables support over 350 unique exchanges



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Customizing Conversica Conversations

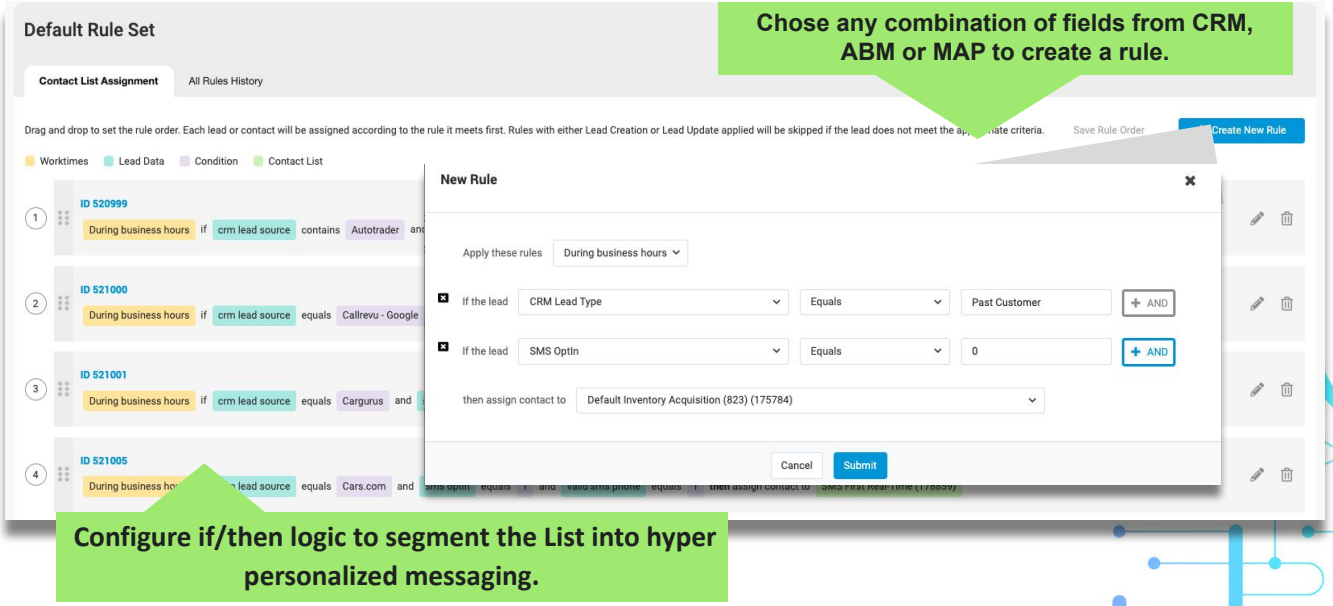
Areas of Customization	Conversica's Customization Capabilities
Create an entirely new conversation	**Yes** - If the goal and intent the customer needs is not represented by one of our 700+ existing conversations then Conversica can build and train a custom conversation with the customer
Body Copy	**Yes** - All "meaty" components of the message are defined by the customer
Define Pull Field Variables	**Yes** - Fields can come from more than one source (CRM and ABM etc)
CTA and Links	**Yes** - A conversation variable, dynamically inserted messages
Subject Lines	**Yes** - subject line of each message and each attempt can be modified
Workflow Timing	**Yes** - Default is 7 attempts over 21 days but each attempt can be customized down to the minute.
Lead Status	**Yes -** Customer can define the status they give each response category within a conversation allowing a customer to tailor the alerts, tracking and reporting based on their internal process and definitions.
Workflow Steps / Next Action	**Yes** - We have a base flow designed by our conversation specialists but each step can be modified and adjusted to tailor how the Assistant responds. A net new action, not in the standard list of actions, can be created and added to the module on a customer by customer basis. Conversica trains the model to recognize and use that new action/intent.

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Conversation Rules: Automate Lead Segmentation

Dynamically route contacts based on lead and account attributes

Use any field to segment a contact and direct them to the most personalized conversation

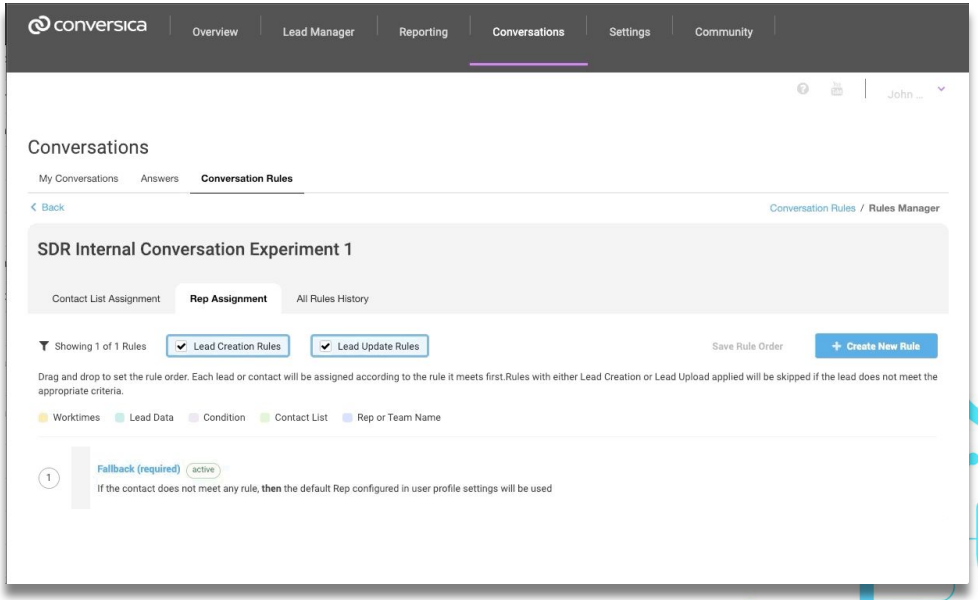


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Conversation Rules: Directs Action

Adjust the Conversation and Assign the Right Rep

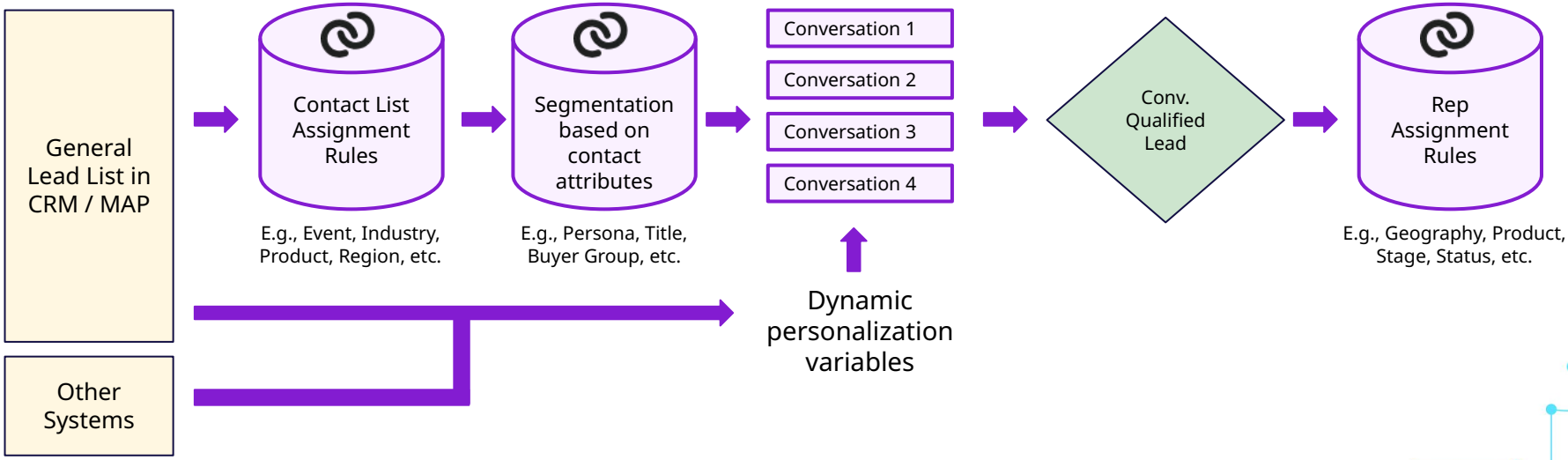
- Use insights and responses to **determine the next step** in the conversation
- Dynamically **Assign a rep** based on specific contact attributes



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Conversation Rules within the Lead Flow



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Contact List Assignment Rules

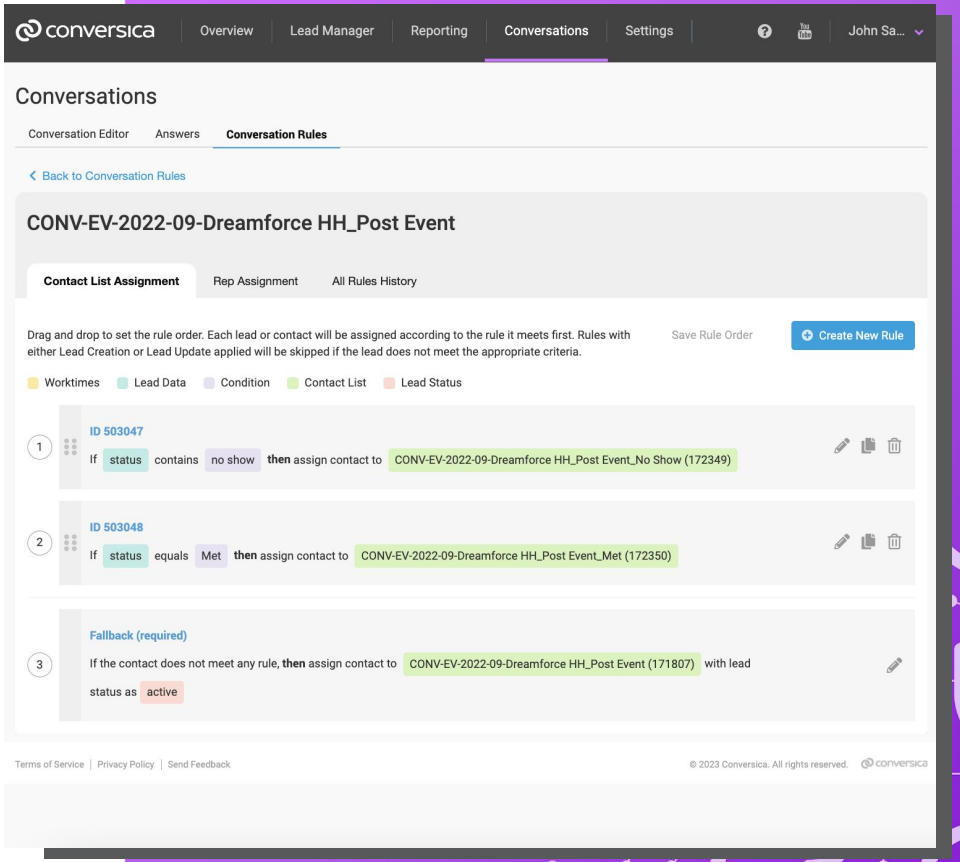
Increase performance with Segmentation

Available:

- **Contact Assignment:** Route contacts to different conversation based on fields in CRM

Segment leads by:

- Event Attendance Status
- Region
- Product Lines
- Buyer Persona
- Comments Fields
- And more…



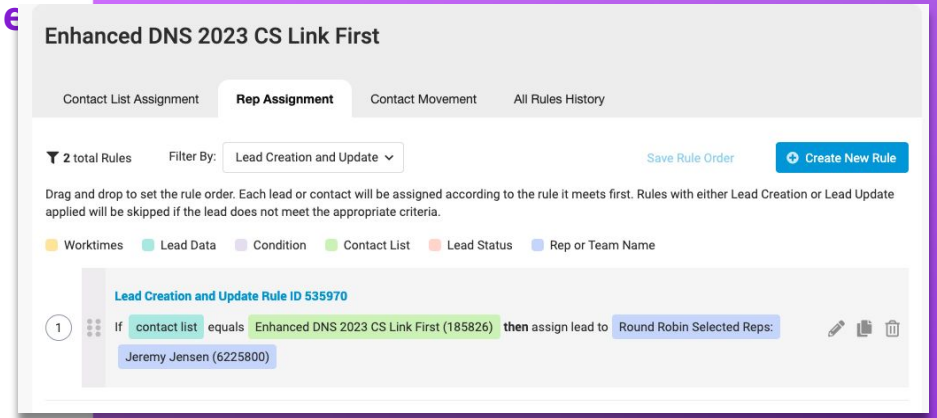
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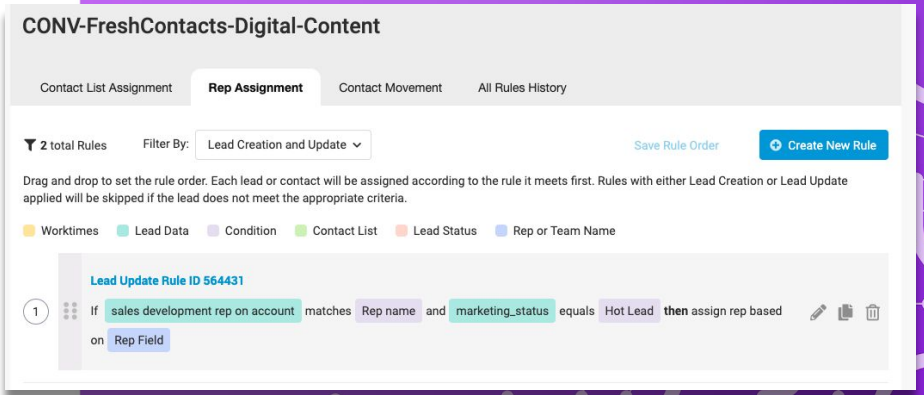
Rep Assignment Rules

Optimize your team's efficiency by enabling the to focus on their specific leads.

- **Use Case 1 -** Stages of the customer Life Cycle
  - Use a different Rep Field in the CRM to determine which rep is assigned.
  - Assign SDR, Account Executive or Customer Success Manager organically for each campaigns objective

- **Use Case 2 -** Minimize Alerts
  - Reassign Leads based on Conversica Lead Status.
  - Funnel all leads to a Default Bucket, until the Conversica Qualifies the lead





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Impact of Segmentation with Conversation Rules

Leica Geosystems part of Hexagon was an early adopter of Conversica Conversation Rules.

- Segmenting all leads based on age of lead and product family
- Tailoring conversation variables and leveraging pull fields

Using Conversation Rules to Segment and Tailor Conversations delivered compelling results

47%

Increase in Conversation Rate

54%

Increase in Conversation Qualified Rate

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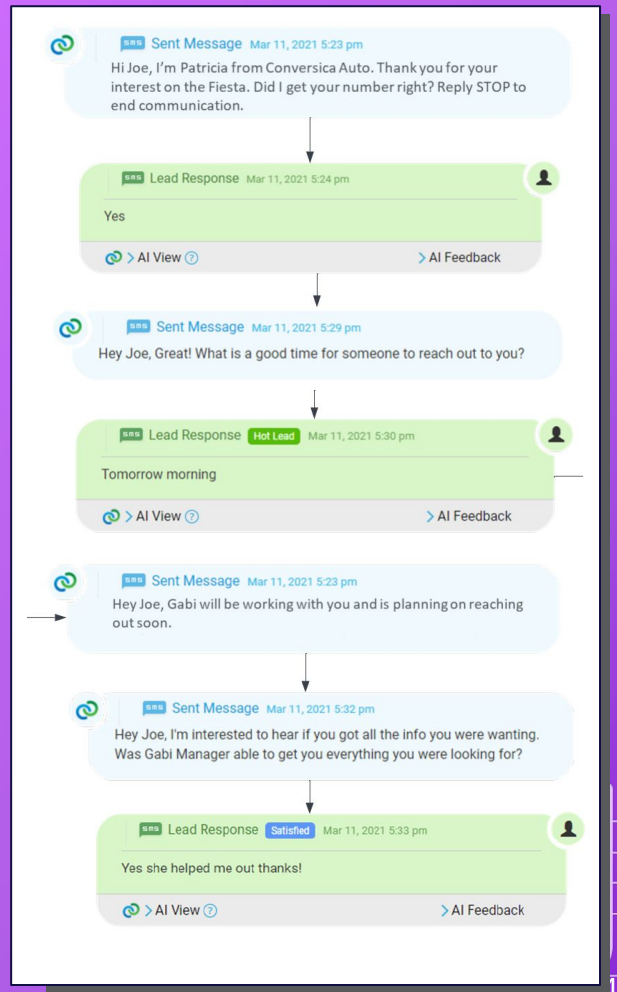
SMS Conversations

Start in or Switch to SMS

Have a conversation when and where customers wants

- Use Texting to provide updates, drive action or increase participation
- Improve your SMS consent by starting a email conversation to get consent and automatically move to SMS
- Switch between channels seamlessly based on customer preference

…. It’s all the greatness of our email engagements just in SMS



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Early Successes with SMS

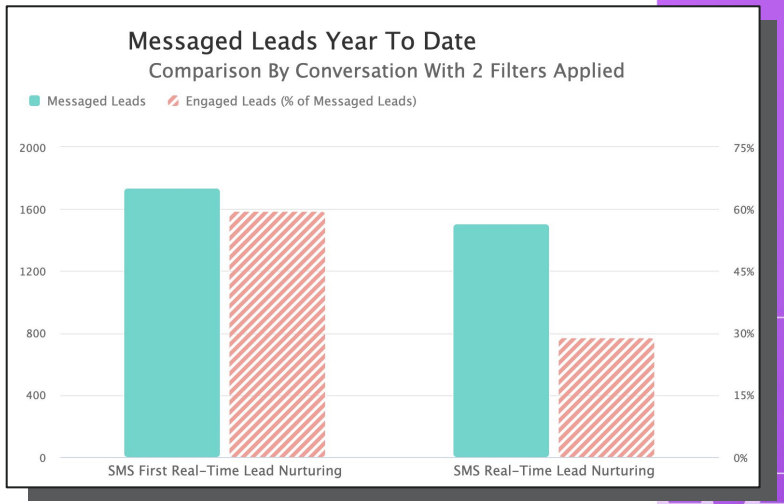
Moved to SMS First and Saw Engagement Double

Use SMS First to follow up with online interest providing notification when a car fitting their parameters has become available and setting up time to see it.

105% Increase in Engagement Rate

81% Increase in Number of Sales

½ Slashed number of days to a Sale in half



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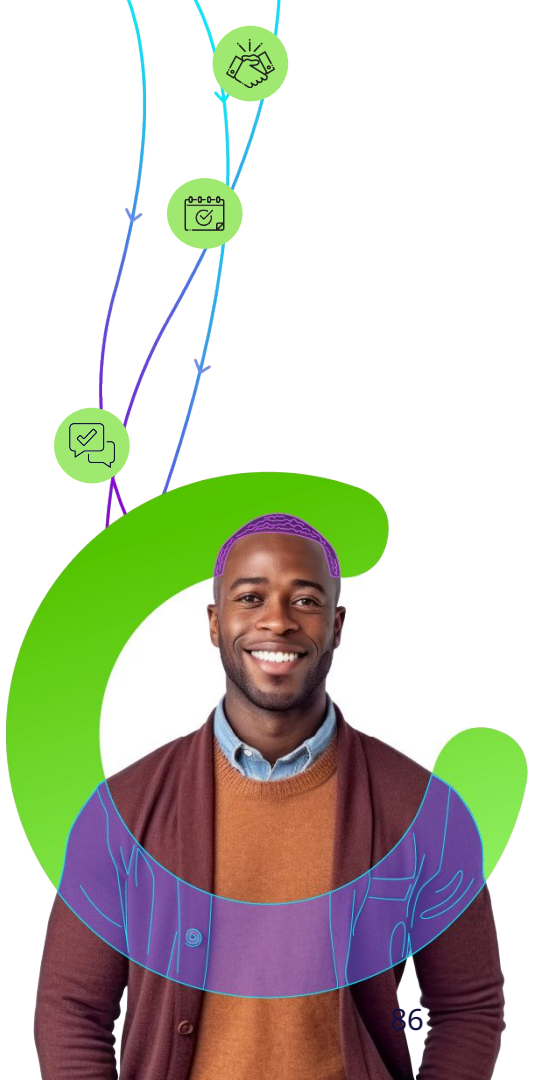
Conversica Product Roadmap

Product Roadmap

Forward Looking Statements

The product roadmap Information shared in this presentation contains forward-looking statements based on Conversica's current expectations, assumptions, and market projections. Conversica abides to agile development with continuous deployment. External factors such as market conditions, technological advancements, and customer feedback may influence our product development priorities and timelines. Consequently, our roadmap and plans are subject to change.

Although we seek to deliver innovative solutions that meet our customers' evolving needs, please be aware that any forward-looking statements made today should not be considered as guarantees of future product functionality, performance, or results, and they should not be relied on. We undertake no obligation to update or revise them, but may do so in related future discussion with you. They are intended to provide you with an understanding of our current strategies and aspirations and reflect our best judgment and knowledge as of today.



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Customer Case Study Slides

- Leica / Hexagon
- IHS Markit / S&P
- Epson
- Hootsuite
- San Jose Earthquakes
- Toronto Blue Jays
- Voyager Sopris
- OEConnection
- Sprint / T-mobile
- ServiceNow

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Leica Customer Story

[Customer Case Study Link]

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Conversica's RDAs Helped Hexagon Move Leads Through the Funnel Faster

*"Literally as soon as we hit go, we had people **responding as hot leads within the hour**. It was like, '**Holy cow, what just happened?**' It was a pretty exciting first day—we almost were **unprepared for how quickly we would get responses.**"*

- Kerry Trivers, VP of Marketing, Leica Geosystems Part of Hexagon



HEXAGON

LEAD CONVERSION

300%

Improvement in net new lead to MQL conversion

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Holly touches every lead having relevant dialog based on interest and action taken

Quick & Personalized Follow up



Holly immediately follows up with any new or existing lead that engages with content, using the product of interest and have a relevant dialog to uncover handraisers

No Lead Left Behind



Holly continuously monitors the age of the lead stock, automatically reaching out with a CTA tailored to the age of lead and product of interest

Best Practices

- All leads are segmented based on product interest and age of lead
- Conversations are tailored to the segment and Salesforce pull fields used to enhance personalization
- Multiple automatic triggers set up based on lead actions
- Conversica is always on, automatically engaging any time a trigger occurs
- Automated Rep assignment and custom notifications

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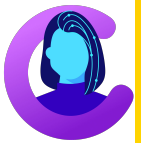
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Turn Interest Into Sales Ready Leads Faster

Challenge

- Keep leads moving through the funnel
- Reconnect with untouched group of aging, dormant leads

Solution

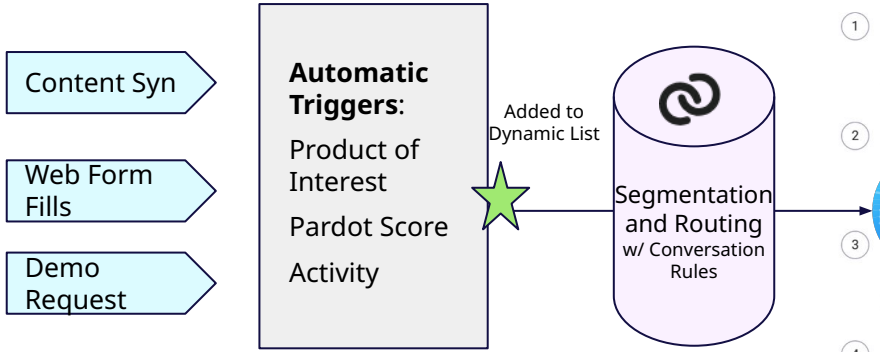


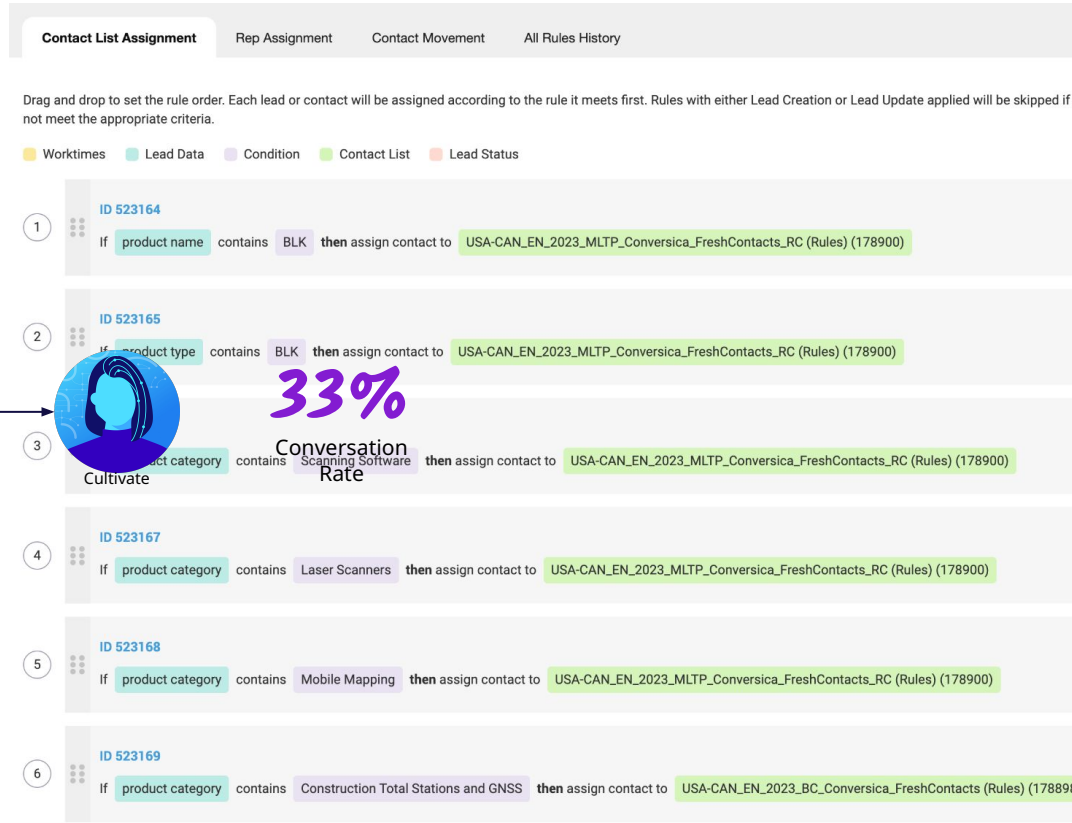
Holly Hudson, *Revenue Digital Assistant™ for Marketing*

- Quickly follows up with on every inbound lead, providing relevant resources based on product interest.
- Automatically identifies and initiates a personalized dialog with aged leads using previous activities.

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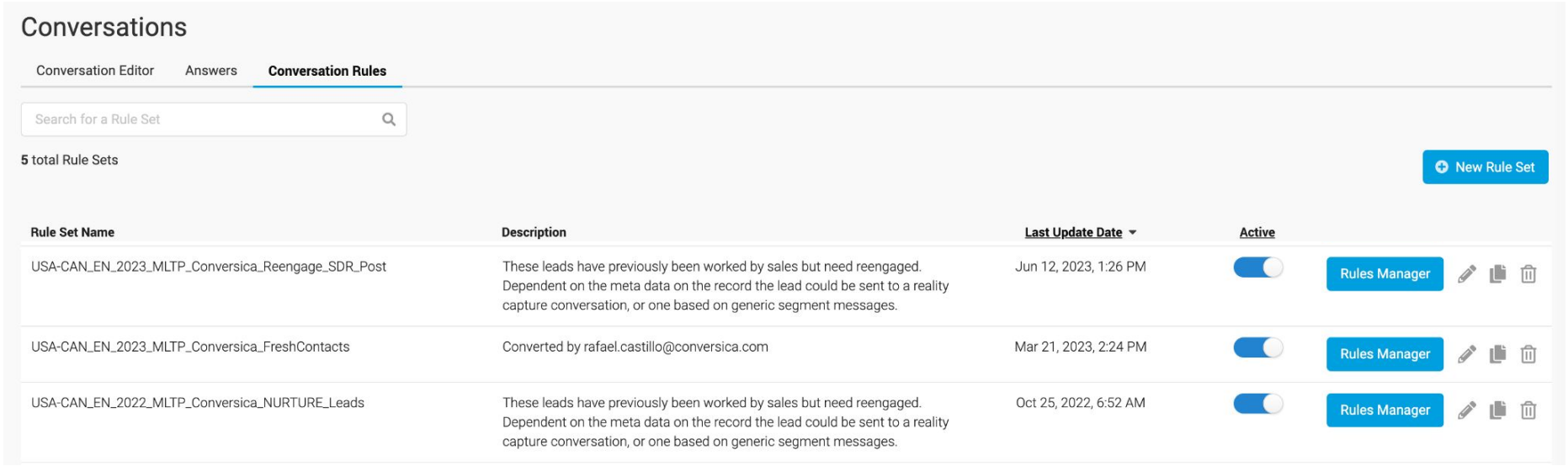
How Leica has Integrated Conversica into their Lead Management Process





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Leica Conversation Rules Implementation

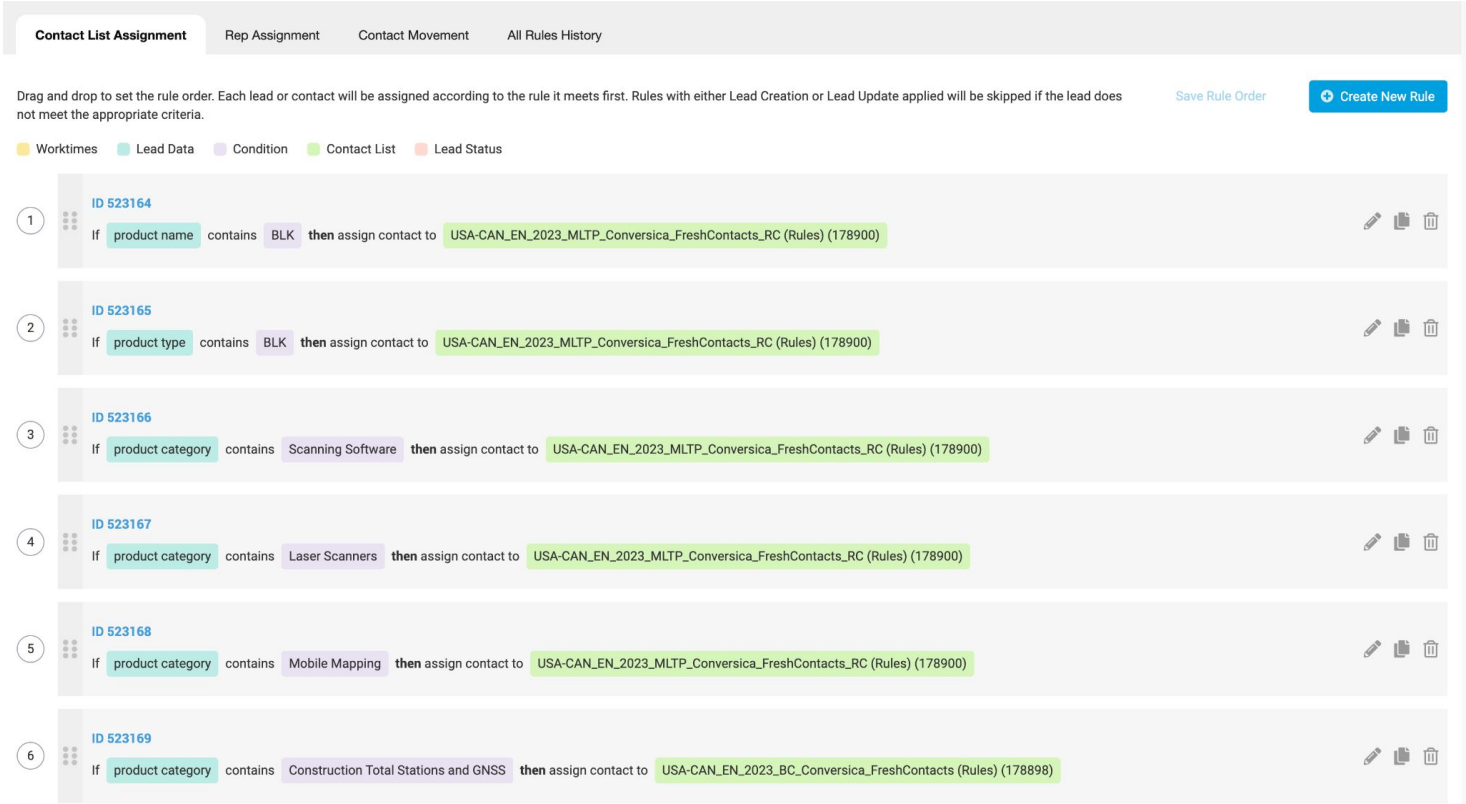


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Leica Lead Engagement Rules

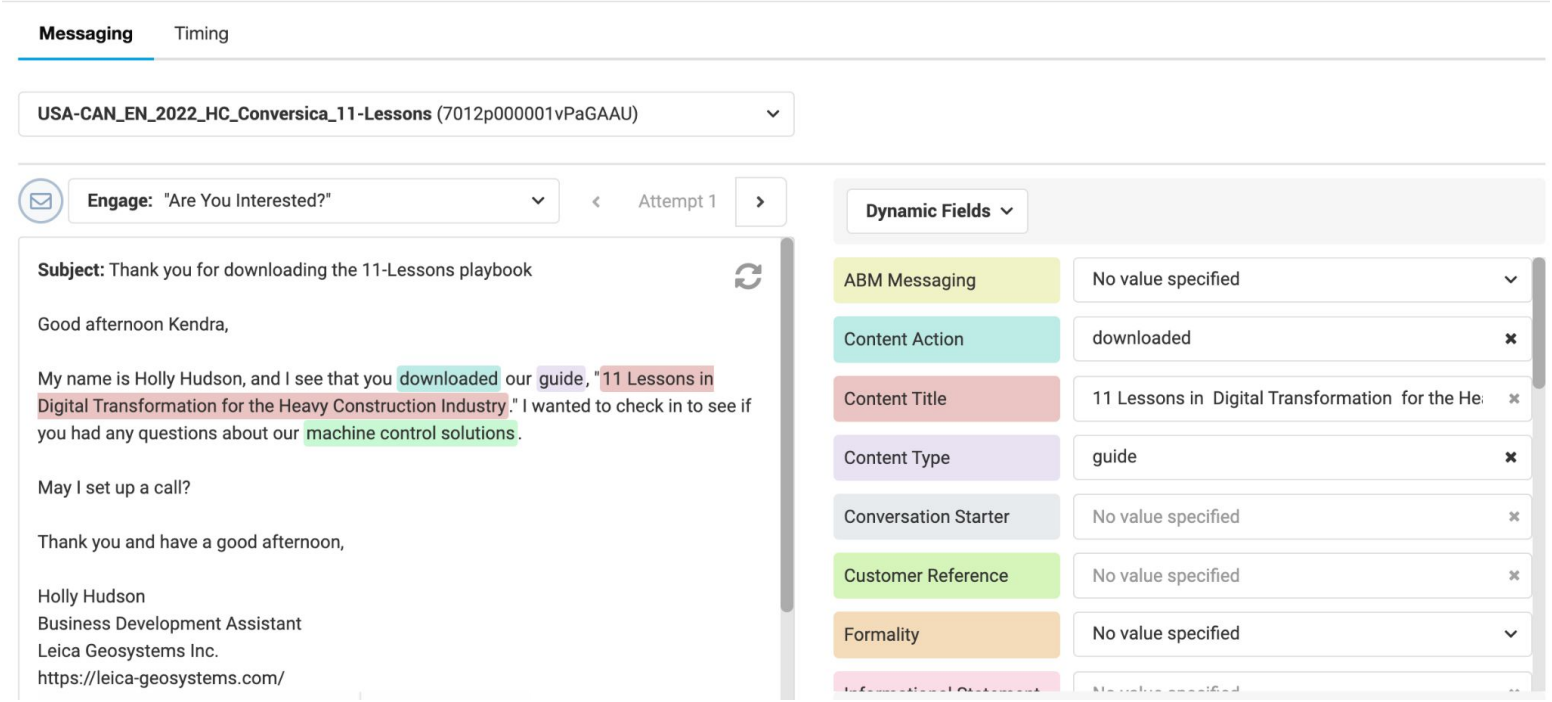
22 Rules

Based on Product Type and Category



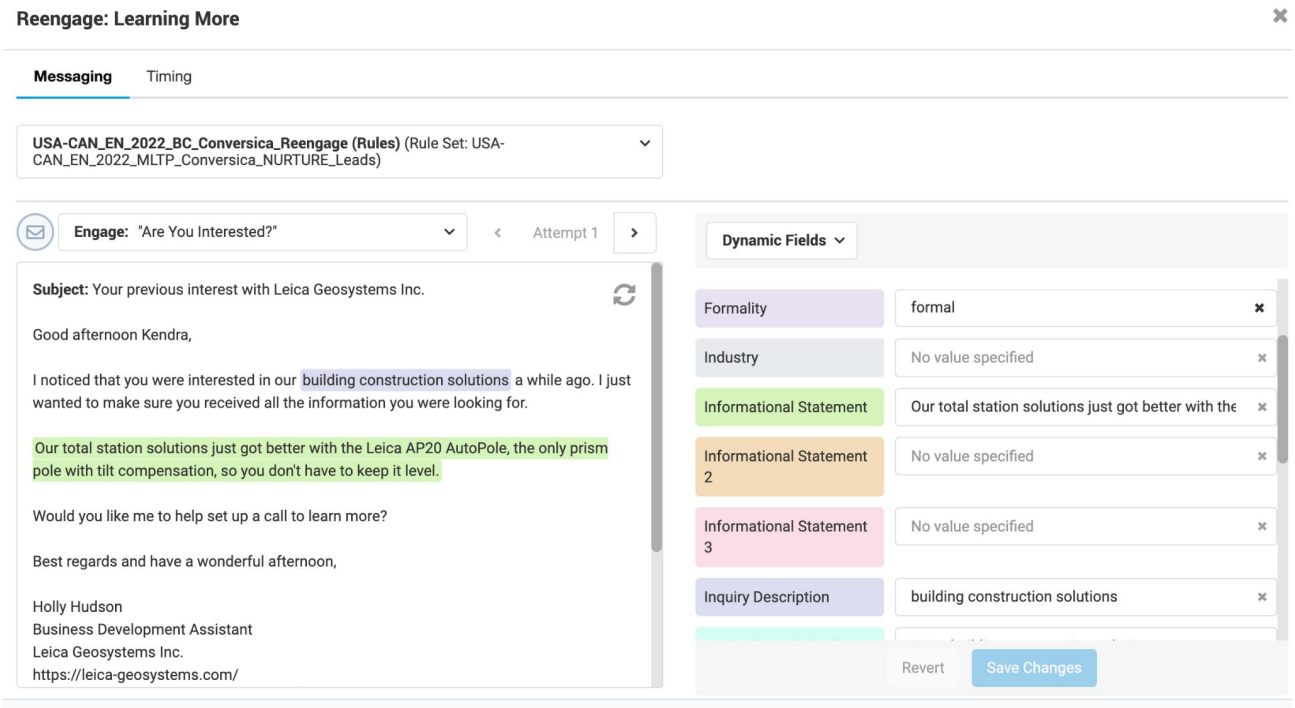
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Leica Cultivate Conversation Example



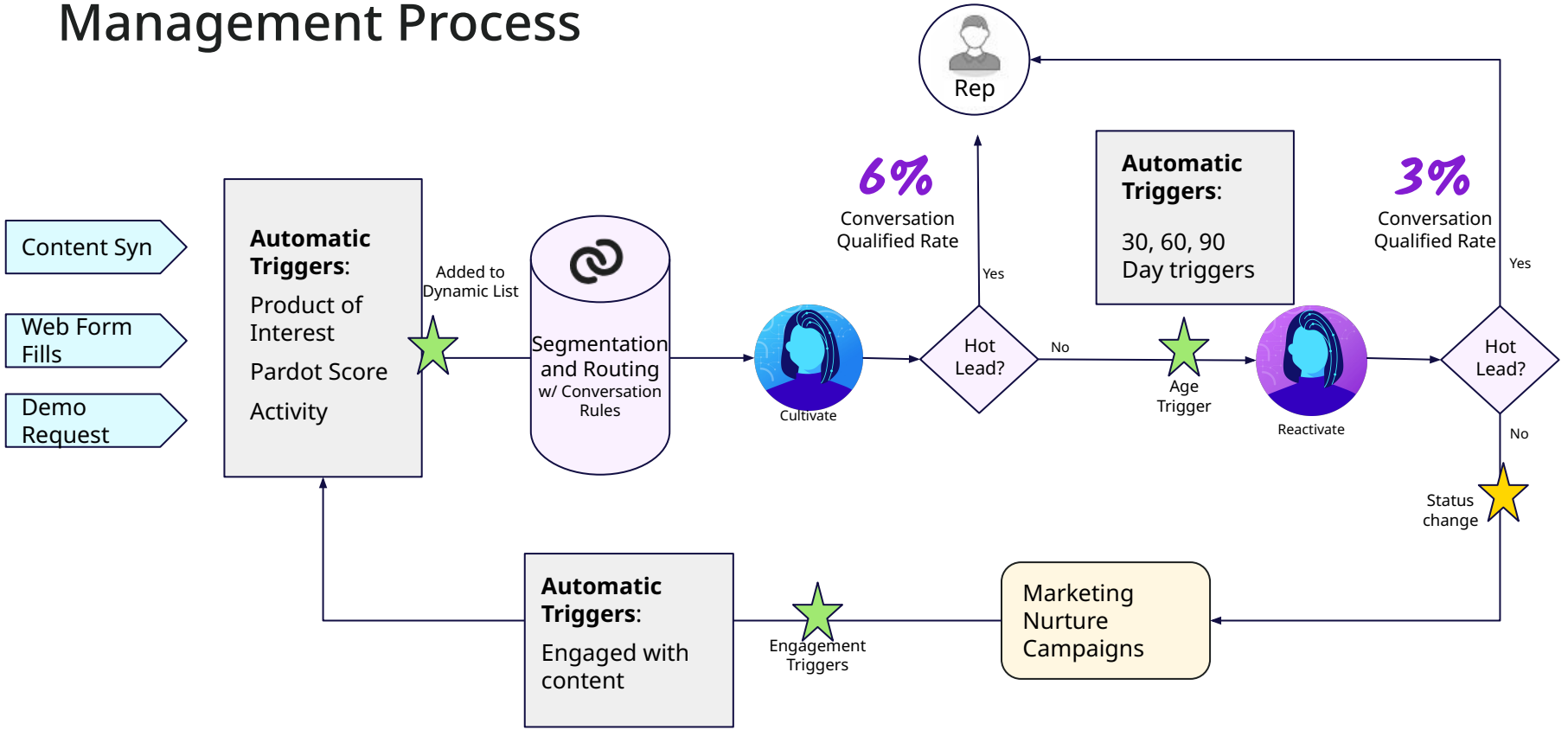
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Leica Reengage Conversation Example



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Increase in Conversation Qualified Rate

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Turn Interest Into Sales Ready Leads Faster

Leica Geosystems

"We decided to take the stance that 'we don't know what we don't know' about a buyer's intent to purchase regardless of what we did know about their engagement with our content. We really questioned if scoring even made sense anymore in deciding if a lead is ready for a sales conversation. So we were looking at how we could communicate in a more personal 1:1 manner with leads, and that's when we found Conversica."

KERRY TRIVERS
VP of Marketing
Leica Geosystems
Part of Hexagon



Challenge

- Keep leads moving through the funnel
- Reconnect with untouched group of aging, dormant leads

Solution

Holly Hudson, *Revenue Digital Assistant™ for Marketing*

- Quickly follows up with on every inbound lead, providing relevant resources based on product interest.
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Business Results

33% LEAD ENGAGEMENT RATE	12% OF TOTAL OPPORTUNITY VALUE INFLUENCED BY RDA
300% IMPROVEMENT IN NET NEW LEAD > MQL CONVERSIONS	23x RETURN ON INVESTMENT

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IHS Markit Customer Story

Customer Case Study Link



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Improving the Quality of the Leads Sales Works

Challenge

- More inquiries than resources to follow up with them
- Inquiries varied in quality and fit, but each had to be touched by sales

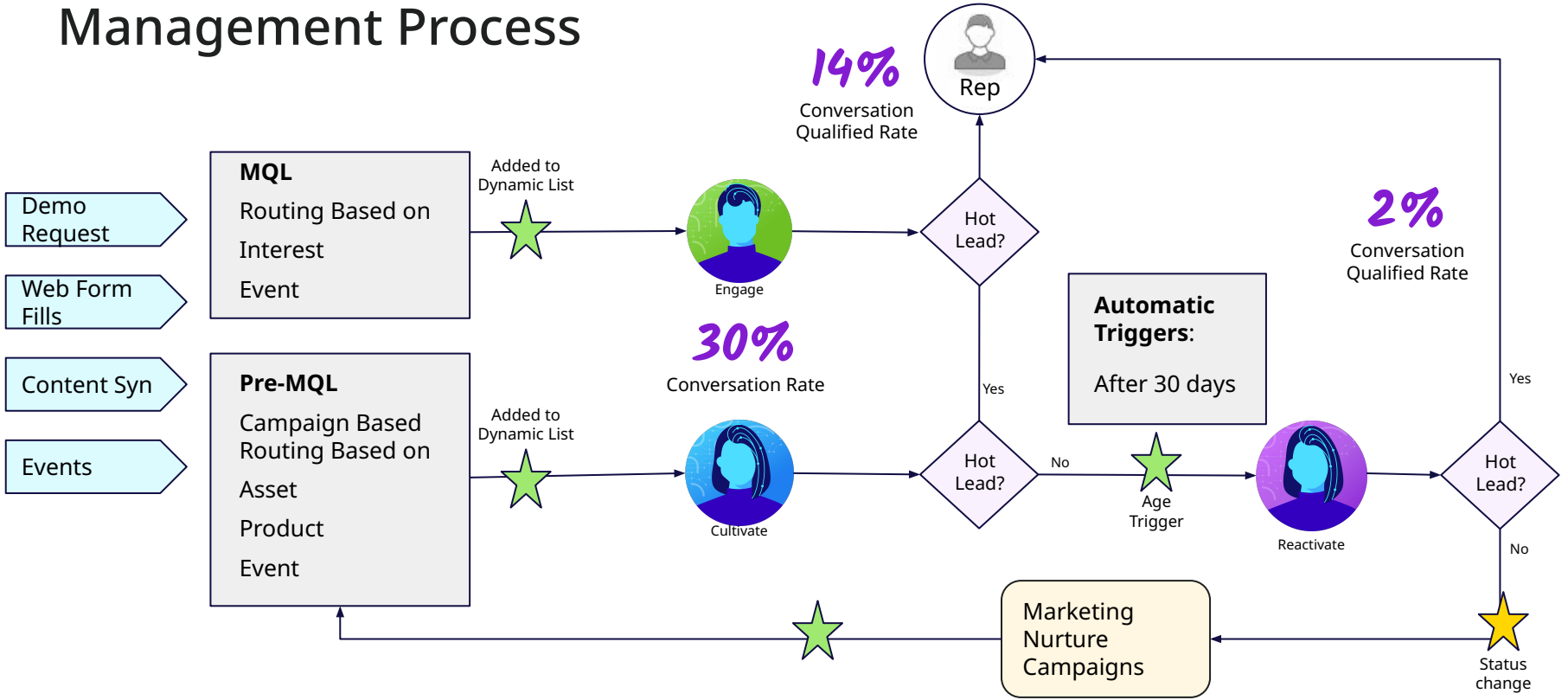
Solution

Taylor Jones, Revenue Digital Assistant™ for Sales

- Immediate follow up with each lead, determining their fit within the ICP and validating their readiness to talk with Sales
- If sales does not connect with the leads, RDAs pick them back up to see if they are still interested or route them to a nurture program

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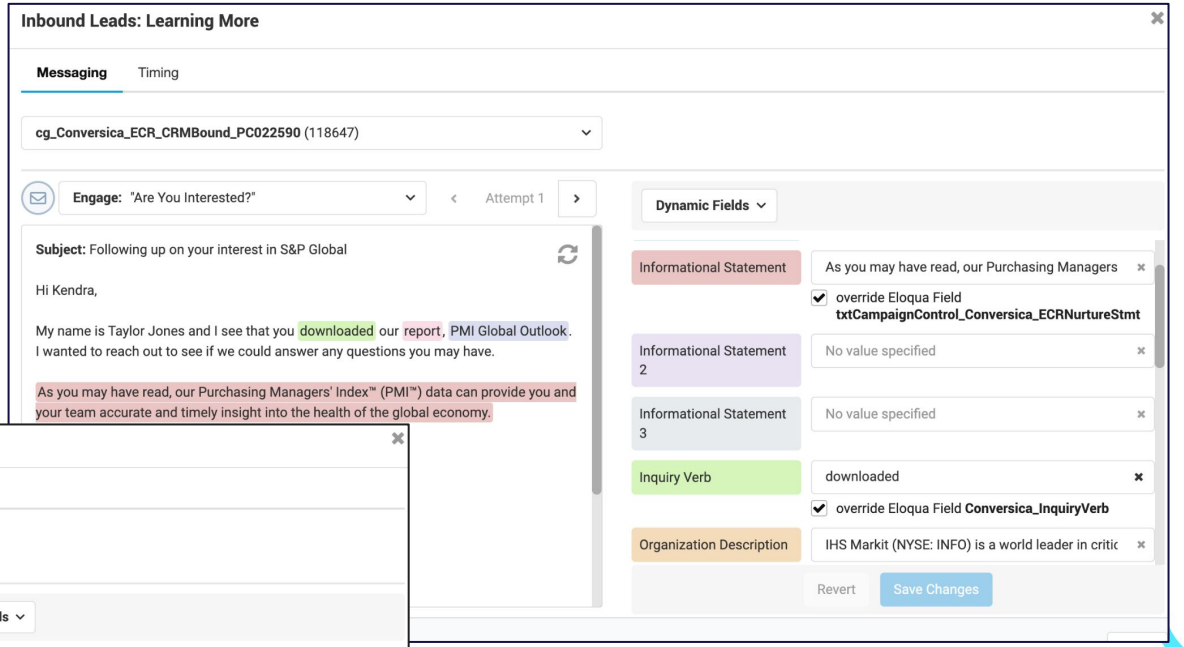
How IHS Markit has Integrated Conversica into their Lead Management Process

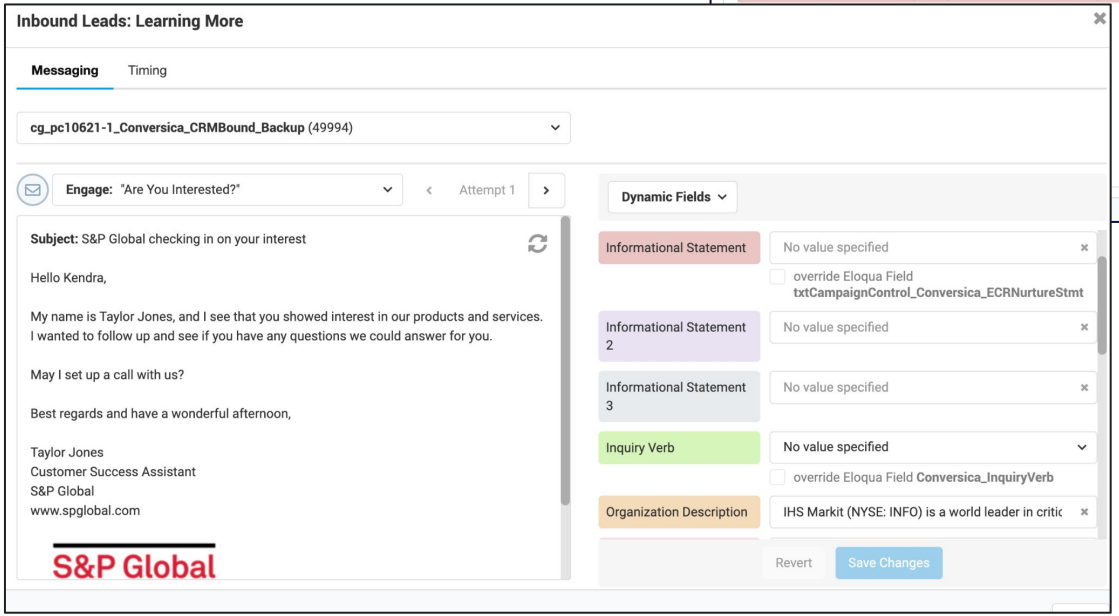


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Campaign Based Segmentation

- Pull Fields to Personalize
- Overwritten for Campaign Specific Engagements





Improving the Quality of the Leads Sales Works

IHS Markit
S&P Global

*"We've been able to **touch nearly every inquiry** that comes into the business. And that's **uncovering incremental, high-quality leads** to support the Sales team."*

ADAM BENITEZ
Marketing Operations Manager

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Business Results

39x RETURN ON INVESTMENT	44% LEAD ENGAGEMENT RATE
7 FTE RDAs EQUIVALENT TO 7 FTEs	100% HAPPIER SALE ORGANIZATION

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EPSON

Improved Response Times and Transformed the Lead Experience

"Before Conversica, leads would come in and whether they were good, bad, qualified, or not qualified, we would just turn them over to our salespeople.

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"

CHRIS NICKEL
Sr Manager, Commercial Marketing Team, Epson America

The Challenge

- Slow follow up, 3-7 days on average
- Leads passed to sales without direct pre-qualification
- Underworked MQL's minimizing Marketing's pipeline contribution



Peyton Collins, Revenue Digital Assistant™ for Marketing
Skills: **Cultivate** Early Interest, **Post Event** Engagement, **Reactivate** Dormant Demand, **Generate** New Interest

Business Results

64x RETURN ON INVESTMENT	75% INCREASE IN MQLs
4 days TO ARR PAYBACK	500% INCREASE IN INFLUENCED PIPELINE

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Taming High Lead Volume

When Hootsuite adopted a Conversica AI Assistant, the team quickly realized that Conversational Marketing from **Conversica worked better than traditional automation solutions**. This was thanks to Conversica's ability to **deliver greater personalization to leads with unmatched speed and persistence**.

The Challenge

- Excessive lead volume
- Too much time spent on addressing unqualified leads
- Routing leads to the Sales team



Taylor Banks, Revenue Digital Assistant™ for Marketing
Skills: ***Cultivate*** Early Interest, ***Reactivate*** Dormant Demand

Business Results

50% INCREASE IN DEMO REQUESTS	700% INCREASE IN LEAD ENGAGEMENT
10x CONVERSIONS FROM CONTENT LEADS	40M OPPORTUNITY REVENUE

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San Jose *Earthquakes*

Winback Fans with Unused Ticket Credit

2023 Top Performer: Sports Industry

Use Case *Details*

- MLS team with **Revenue Digital Assistant for Ticket Sales**
- Winback conversation target fans who haven't purchased tickets or services in **>3 months**
- Messaging adapted based on **fan's past experiences**

Keys to *Success*

- Fans **automatically segmented** by purchase history
- Segment with **unused ticket credit** gets best results
- Includes credit **expiration date to add urgency**

57% **CONVERSATION RATE**

47% **CONVERSATION QUALIFIED RATE**



Sent Message | Feb 12, 2023 10:51am

Samantha Martinez with the Quakes reaching out

Hello Miguel,

I'm reaching out because I realized that you have account credit remaining with the Quakes and I want to see if you are interested in more information about how you can use this credit before it expires this season.

This amount can be used only toward tickets to matches in 2023. Our season officially starts on Saturday, March 4th!

May I set up a call with us?

Thank you very much,
Sarah Martinez
Ticketing Sales Assistant

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Toronto Blue Jays

Upgrade Single Game Buyers to Season Tickets

2023 Top Performer: Sports Industry

Use Case Details

- MLB team with **Revenue Digital Assistant for Ticket Sales**
- Winback conversation with a twist: focus on **past single-game ticket buyers**
- Messaging adapted based on **fan's purchase history**

Keys to Success

- Fans **automatically segmented** by purchase history
- **Targeted offer** designed to entice season ticket purchase
- Smooth handoff of **true interest to sales rep** to close the deal

40% **CONVERSATION RATE**

23% **CONVERSATION QUALIFIED RATE**



Sent Message | Nov 2, 2023 9:04 am

Reaching out from the Blue Jays

Good morning Michael,

I noticed that you had previously purchased our single game tickets. I wanted to reach out to see if we could get you some information about our Season Ticket packages.

Would you like us to send some information your way?

Have a good morning,
Alex Cousins
Ticket Information Specialist
Toronto Blue Jays Baseball Club

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VOYAGER SOPRIS LEARNING®

2023 Top Performer: Tech Industry

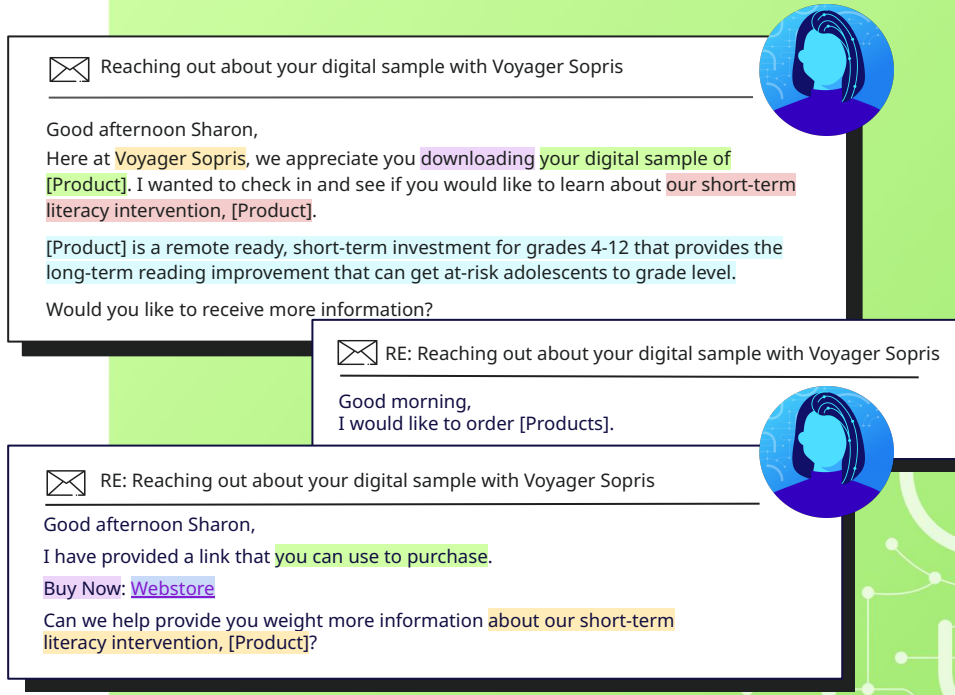
Instant Follow-Up on Digital Downloads

Use Case *Details*

- **Education software** company with Revenue Digital Assistant for Marketing
- Follow up on **digital sample downloads** to convert to purchase
- Shares **purchase link** when lead turns “hot”

Keys to *Success*

- **Automatic triggers** ensure flawless follow-up
- **Rep-less conversion** thanks to online purchase option
- Circle back function to check for **additional needs or answer questions**



21% CONVERSATION RATE

34% OF HOT LEADS CONVERT TO ONLINE PURCHASE

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OEConnection®

Drive Account Health for Retention & Growth

2023 Top Performer: Tech Industry

Use Case *Details*

- **Education software** company with Revenue Digital Assistant for Marketing
- Follow up on **digital sample downloads** to convert to purchase
- Shares **purchase link** when lead turns “hot”

Keys to *Success*

- **Automatic triggers** ensure flawless follow-up
- **Rep-less conversion** thanks to online purchase option
- Circle back function to check for **additional needs or answer questions**



Sent Message | Aug 12, 2023 2:25 pm

OEConnection Checking In

Hello Pete,

Hopefully you had a nice week.

I’ve been working with your Customer Success Rep and it is time to schedule your account review if you are interested. It will only take about 10 minutes to go over your performance so far and answer any questions that you may have.

From my perspective, you are off to a good start. However, I still wanted to check in to make sure that there isn’t anything else you needed on your end.

Would you be interested in scheduling a call?

Regards,
Harper Wilson
Customer Success Assistant

21% **CONVERSATION RATE**

34% **OF HOT LEADS CONVERT TO ONLINE PURCHASE**

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Scaling Retention to New Heights

Sprint T-Mobile

Problem

- 1000s of customers on legacy system
- Lack of engagement due to traditional outreach
- Needed to upgrade Push-to-Talk users to SDC
- Unable to schedule account reviews of B2B customers

Solution

Sales prospecting	Customer Success	Coverage
Conversational sales • Engage • Activate	**Conversational CS** • Drive Health • Renew • Expand • Cross-Sell	• 110k messaged • 22% engagement rate • 11% hot lead rate

HOT LEADS

56%

Engaged to Sales Ready!
In just two weeks of launch.

ONGOING BUSINESS IMPACT

$915K

ARR generated in less than a year

EFFICIENCY GAINS

$800K

labor costs saved over 15 months

DATA QUALITY IMPACT

14,706

phone numbers were updated

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Working Every Lead to the Fullest

servicenow

Problem

- ServiceNow wanted to institute a “no lead left behind” policy
- Large volume of inbound leads that exceeded sales capacity to follow-up
- They wanted ADR to focus on outbound prospecting

Solution

Marketing influenced	Sales prospecting	Regions
Conversational marketing • Post-event	**Conversational sales** • Engage	• North America • Nordics • LATAM

HOT LEADS

2.8k

leads were found who were ready to talk

ONGOING BUSINESS IMPACT

$6.3M

pipeline and $400k revenue created by Conversica RDAs in a fiscal year

EFFICIENCY GAINS

$782K

labor costs saved over 2 years

DATA QUALITY IMPACT

9084

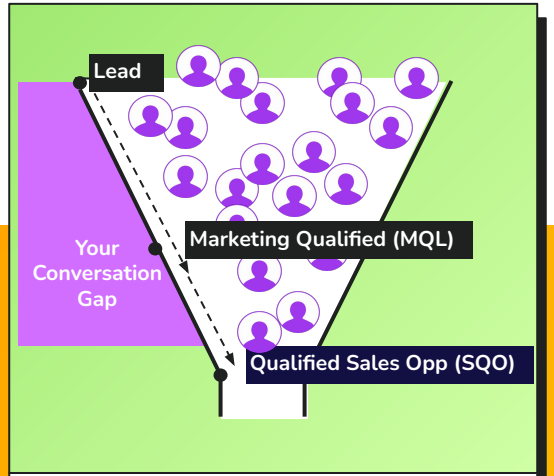
phone numbers were updated in addition to detecting 9k unhealthy emails

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ARCHIVE

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Resulting in Challenges

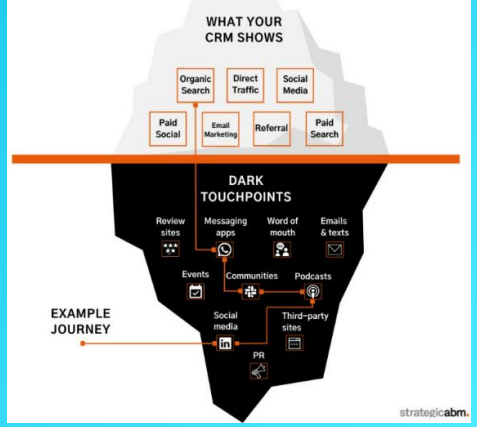


A Conversation Gap

Personalized Experiences Requires Resources

TBD

Need branded version of this



Smaller Window of Influence

xxx

TBD

<illustrates “talk at” with inefficient results>

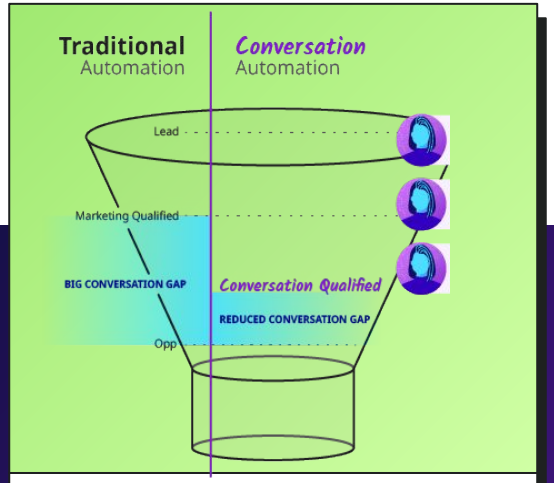
Antiquated MarTech

xxx

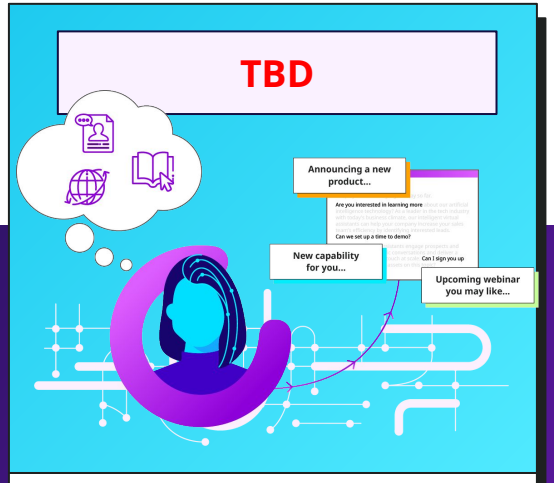
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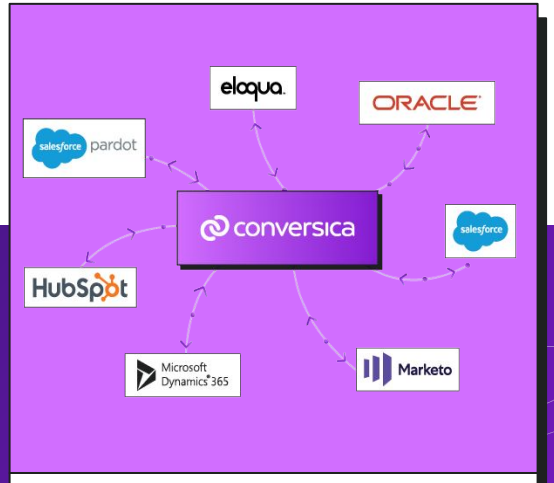
Conversica will Provide a Competitive Edge



Close The Gap with Two-Way Conversations



Powerfully Human First Impressions



Elevate Existing MarTech Investments

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3 Ways to Meet Expectations and Exceed Pipeline Objectives

1

Deliver ***Compelling First Impressions***

Respond First with a Tailored Reply that Encourages Dialog

- Right message, right time, any channel

RESULT
Increase Customer ***Engagement Rates***

25% Conversation Rate[1]

2

Have ***Personalized Conversations***

With Every Buyer, Persistently and at Scale

- Hyper-personalized exchanges that produces qualified hand raisers

RESULT
Transform Funnel ***Conversion Rates***

12% Conversation Qualified Rate[1]

3

Modernize ***Lead Management*** with AI

Turn One-way Nurture Into Active Converational Engagements

- Integrate conversations into all marketing activities

RESULT
Maximize ***MarTech ROI***

24x Average ROI[2]

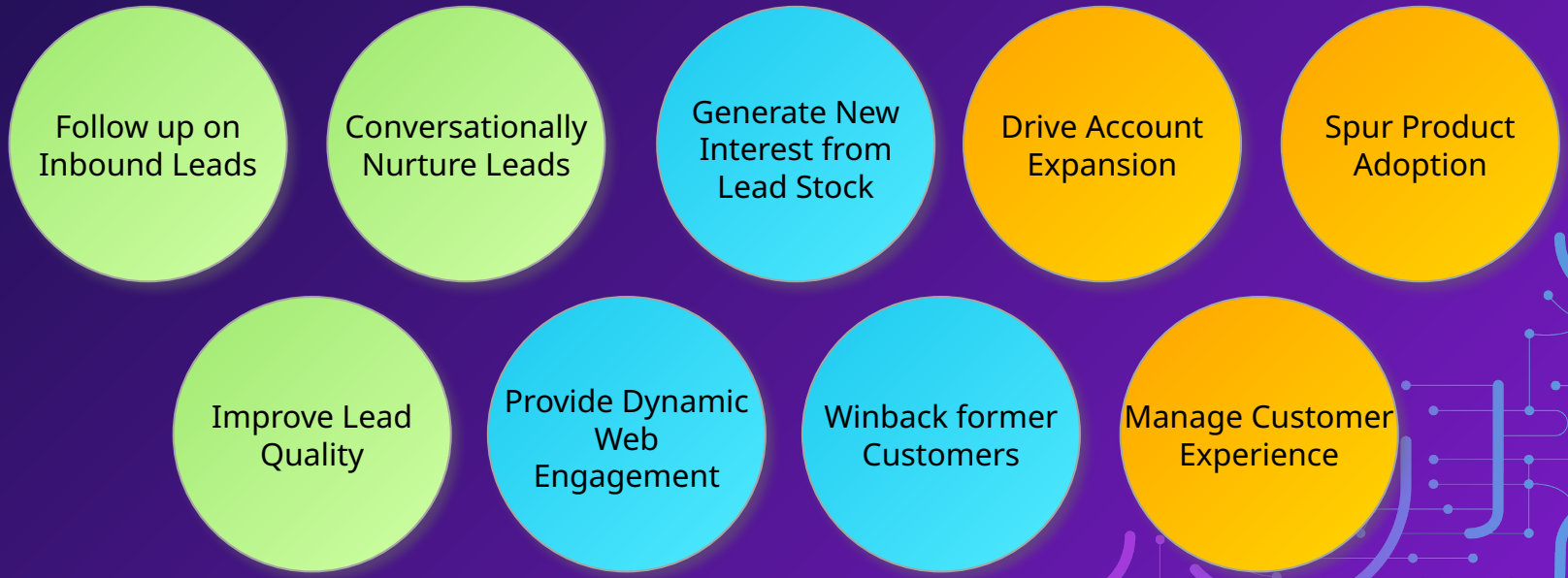
Captivate Buyers and Create a ***Competitive Advantage***

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Sources: 1. Conversation Index 2 Total ROI Roll Up Report

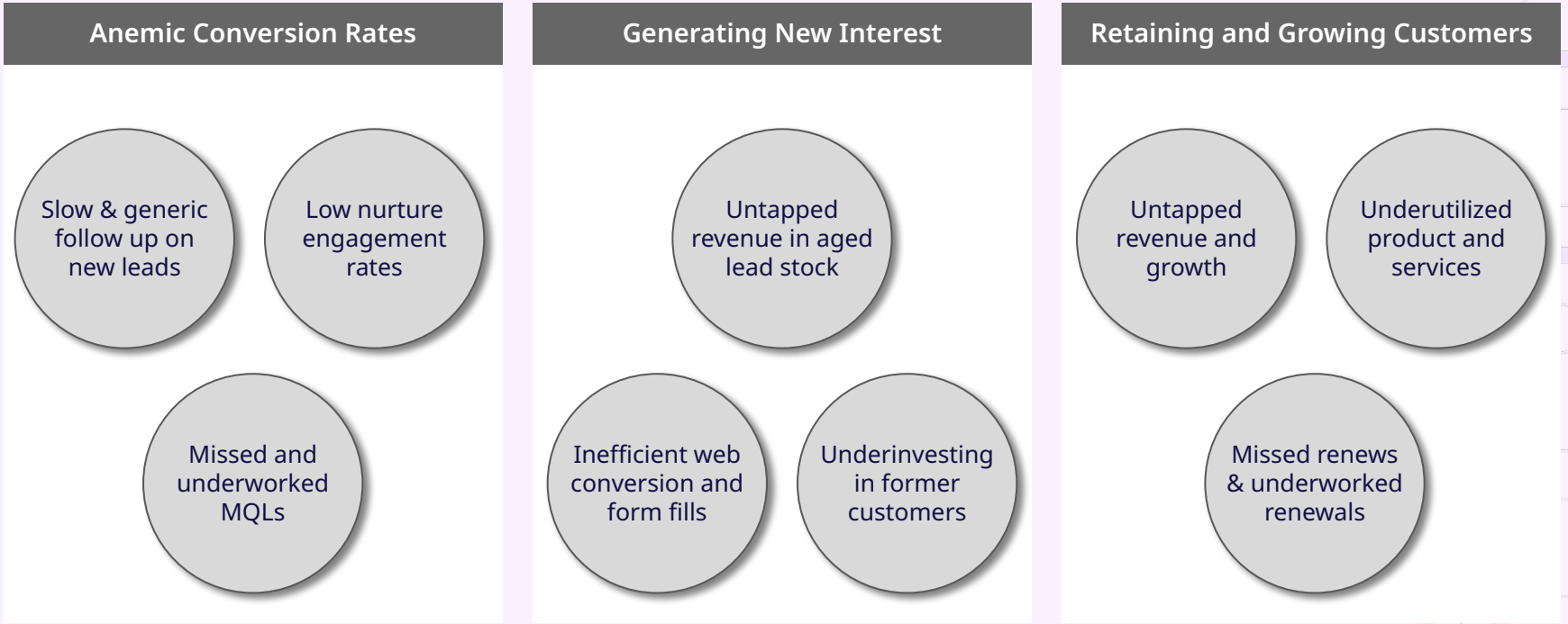
Specialized in Uncovering and Converting Revenue Opps



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What Challenges Are You Facing?



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Where Are the Speed Bumps in Your Funnel?

Generating New Interest

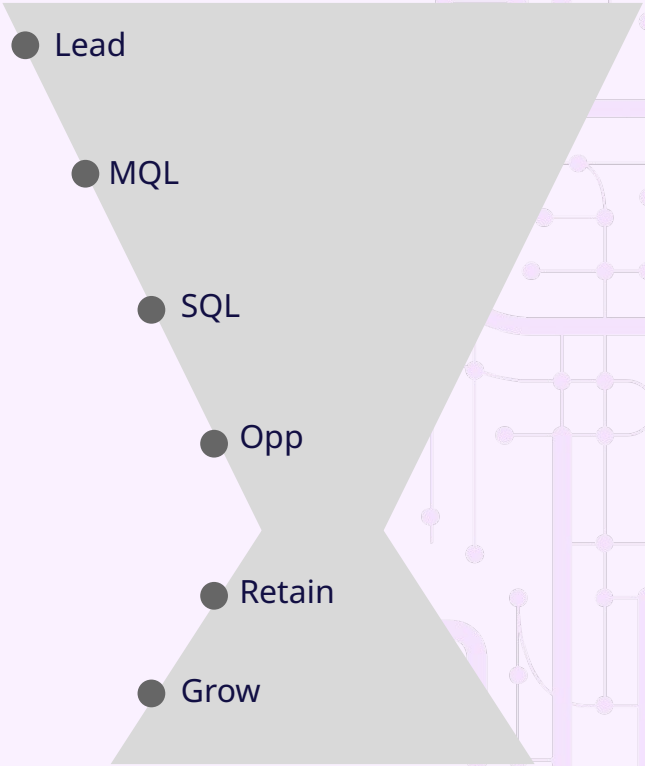
- Untapped revenue in aged lead stock
- Inefficient web conversion and form fills
- Underinvesting in former customers

Anemic Conversion Rates

- Slow & generic follow up on new leads
- Low nurture engagement rates
- Missed and underworked MQLs

Retaining and Growing Customers

- Untapped revenue and growth
- Underutilized product and services
- Missed renews & underworked renewals

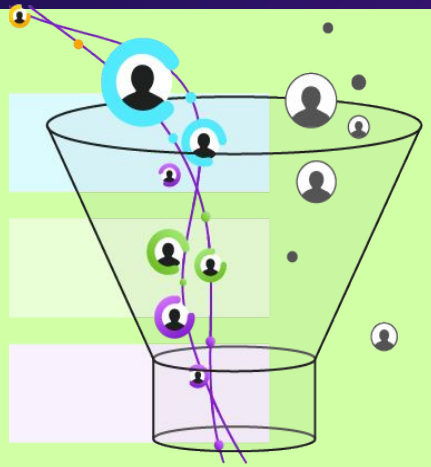


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Conversica Puts You in the *Conversion Fast Lane*

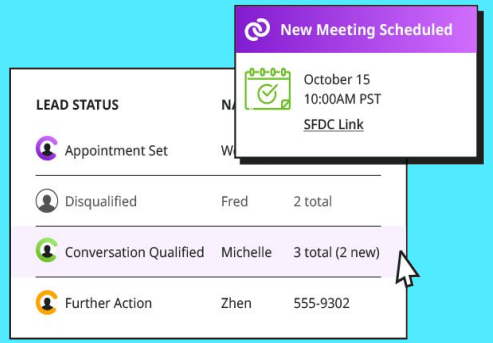
Maximize Funnel Conversion



More Quality Leads

Find Hand Raisers &
Confirm Interest Earlier

Drum Up Fresh Interest



Get More At Bats

Turn Outbound Motions into
Hot Inbound Leads

Drive Retention & Expansion



Drive Growth

Give Every Customer VIP,
High Touch Experience

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Specialized in Uncovering and Converting Revenue Opps

Maximize Funnel Conversion

- Follow up on Inbound Leads
- Conversationally Nurture Leads
- Improve Lead Quality

Drum Up Fresh Interest

- Generate New Interest from Lead Stock
- Provide Dynamic Web Engagement
- Winback former Customers

Drive Retention & Expansion

- Drive Account Expansion
- Spur Product Adoption
- Manage Customer Experience

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Drum Up Fresh Interest

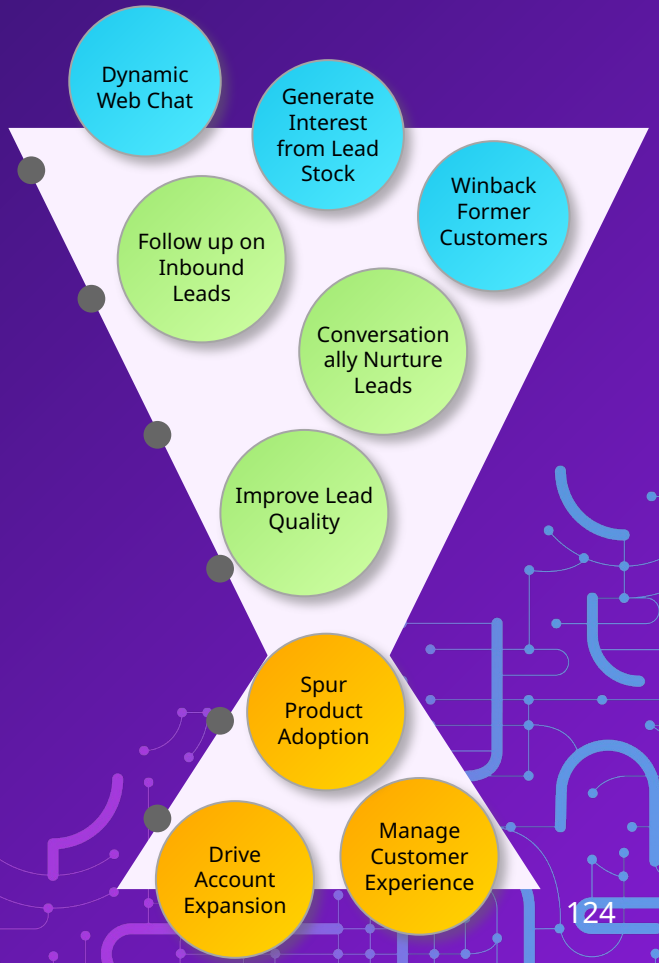
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Maximize Funnel Conversion

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- Manage Customer Experience



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Specialized in Uncovering and Converting Revenue Opps

Drum Up Fresh Interest

Provide Dynamic Web Engagement
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Winback former Customers

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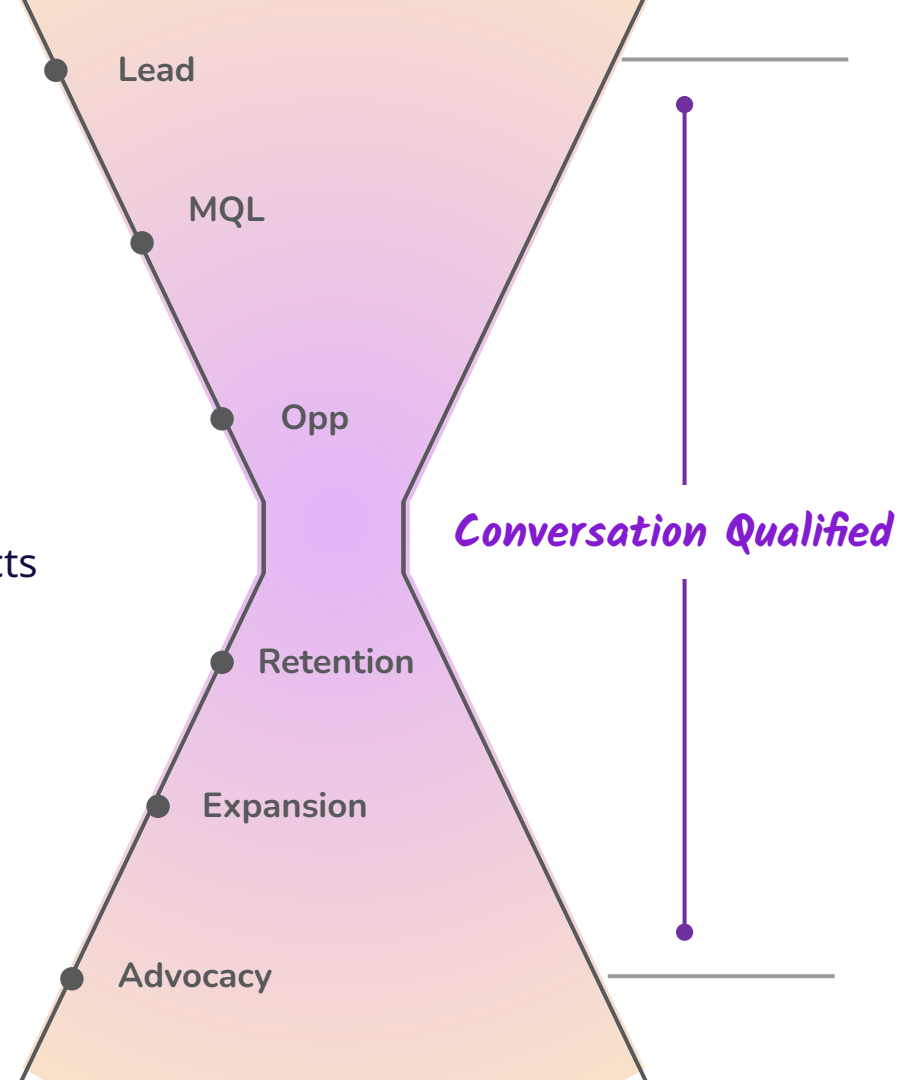
Revenue Digital Assistants

Close the Conversation Gap

Engage Everyone Throughout the Funnel in Personalized Human-like Conversations

Delivering ***Conversation Qualified*** Contacts at Every Stage of the Journey

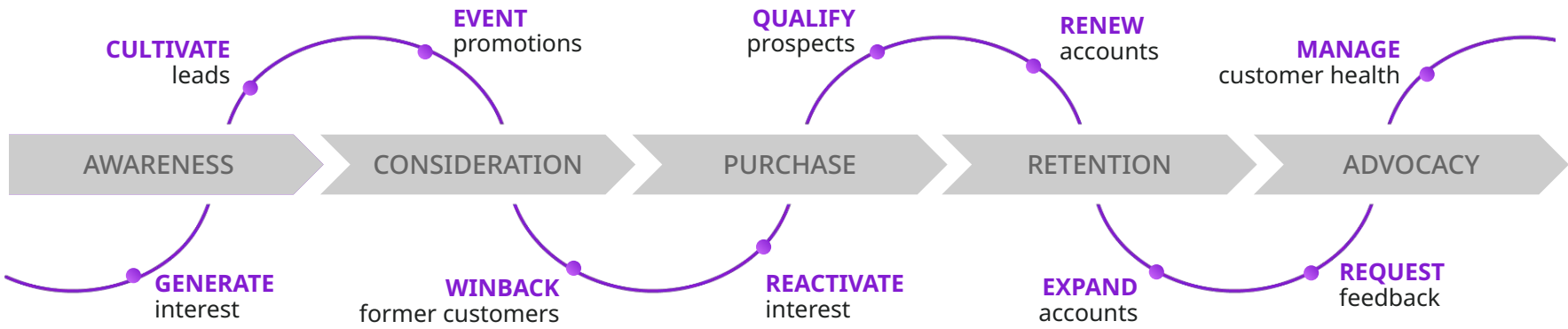
- More, High Quality Leads
- Sales Gets More at Bats
- More Conversations to Drive Customer Health



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RDAs Influence and Persuade at Every Stage in the Lifecycle



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TEMPLATE

Converisa Value statement

How it works

To address challenge



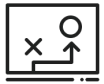
Value statement

XX



XX

XX



XX

XX



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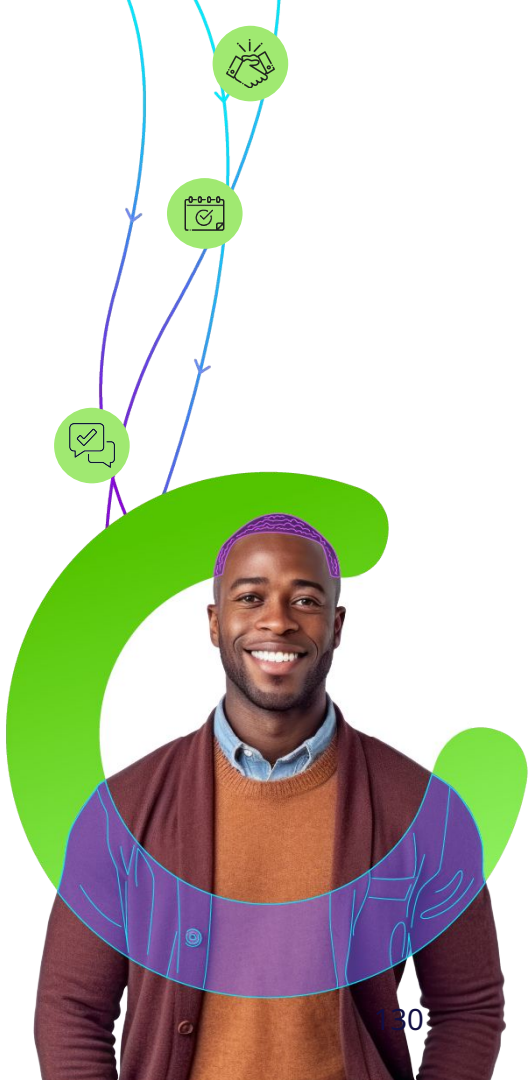
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Why Conversica

xxxx

- xxxxx



12%
Conversation Qualified Rate

300%
Increase in Lead to MQL rate

18%
Opportunity rate

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Conversica's RDAs Helped Hexagon Generate More Inbound Leads

"As soon as we hit go, we had people responding as hot leads within the hour. We had opportunity value that we didn't even know was there."

- Kerry Trivers, Vice President, Marketing, Hexagon



HEXAGON

RETURN ON INVESTMENT

32X

achieved positive ROI
in just 11 days

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Conversica's RDAs Helped Epson
Reenergize Previous Interest

"[Through RDA's efforts], we learned quite a bit about how best to nurture prospects, including the fact that they need to be touched, on average, six to eight times before they respond and that they are more responsive if they are emailed at the times they prefer."

- Chris Nickel, Senior Marketing Manager, Epson America

EPSON



INCREASE IN PIPELINE

500%

Epson's RDA paid for itself in 4 days

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Conversica's RDAs Helped LA Galaxy Engage With More Leads

"We wanted to tap into a lead pool that our Account Executives were not getting to. We've been using Conversica to reach out to fans that we may have been overlooking in the past."

- Aline Mardelli, Senior Manager of Ticket Sales, LA Galaxy



REVENUE INCREASE

163%

Despite COVID restrictions, LA Galaxy more than doubled revenue from ticket sales with Conversica

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Conversica RDA in Action

Need a better conversation and have this slide designed

Initial Outreach

Good afternoon Sam,

I hope your quarter is going great.

Graduating from basic accounting to AI-powered financials is more important than ever in today's business environment. ACME can help your team streamline payment processing while increasing efficiency. Just ask our customers: ACME has been a vital part of their strategy. We can leverage the same result for your team.

ACME is the #1 accounting software for more than 670 financial services firms that collectively manage more than $1.3 trillion AUM.

May I assist in setting up a call to discuss this further?

Have a great afternoon,
Ashley
Business Development Assistant



Subsequent attempts to engage

Hi Sam,

I'm following up on my previous email regarding ACME. If you have some time, I can set up a call with a representative to talk about how we can help your team streamline payment processing while increasing your efficiency.

Would you like to receive a call to learn more?

Thank you and I hope you have a wonderful afternoon,,
Ashley
Business Development Assistant



Hi Sam,

I'm following up on my previous emails to see if you may be interested in learning more about ACME.

With ACME, streamline payment processing while increasing efficiency for nearly 70% less than average processing costs.

May I set up a call for you to learn more?

Thank you very much and have a great morning,
Ashley.
Business Development Assistant



Prospects Reply

Hi Ashley,

I think we'd like some information on this. I can definitely see some benefit but I can also already foresee a lot of hurdles.

Regards,
Sam Bowie
Regional Director
(680)-342-4254

Alert Sales Rep & Update CRM

Responds based on Positive Intent

Hi Sam,

I will have a member of our team call you about this. Would you like us to reach to you at (680)-342-4254 during the day?

Thank you for your time,
Ashley
Business Development Assistant



Prospect Provides Contact Number

Hi Ashley,

My direct line is (680)-555-2512. Best to email prior to calling. I am not always in my office.

Regards,
Sam Bowie
Regional Director
(680)-342-4254

Alert Sales Rep & Update CRM

Post Engagement Follow up

Hi Sam,

I just wanted to follow up and make sure you received the information you were looking for. Did a member of our team reach out and connect with you?

Have a good day,
Ashley
Business Development Assistant



2 Days Later RDA follows up

Prospect Satisfied

Hi Ashley,

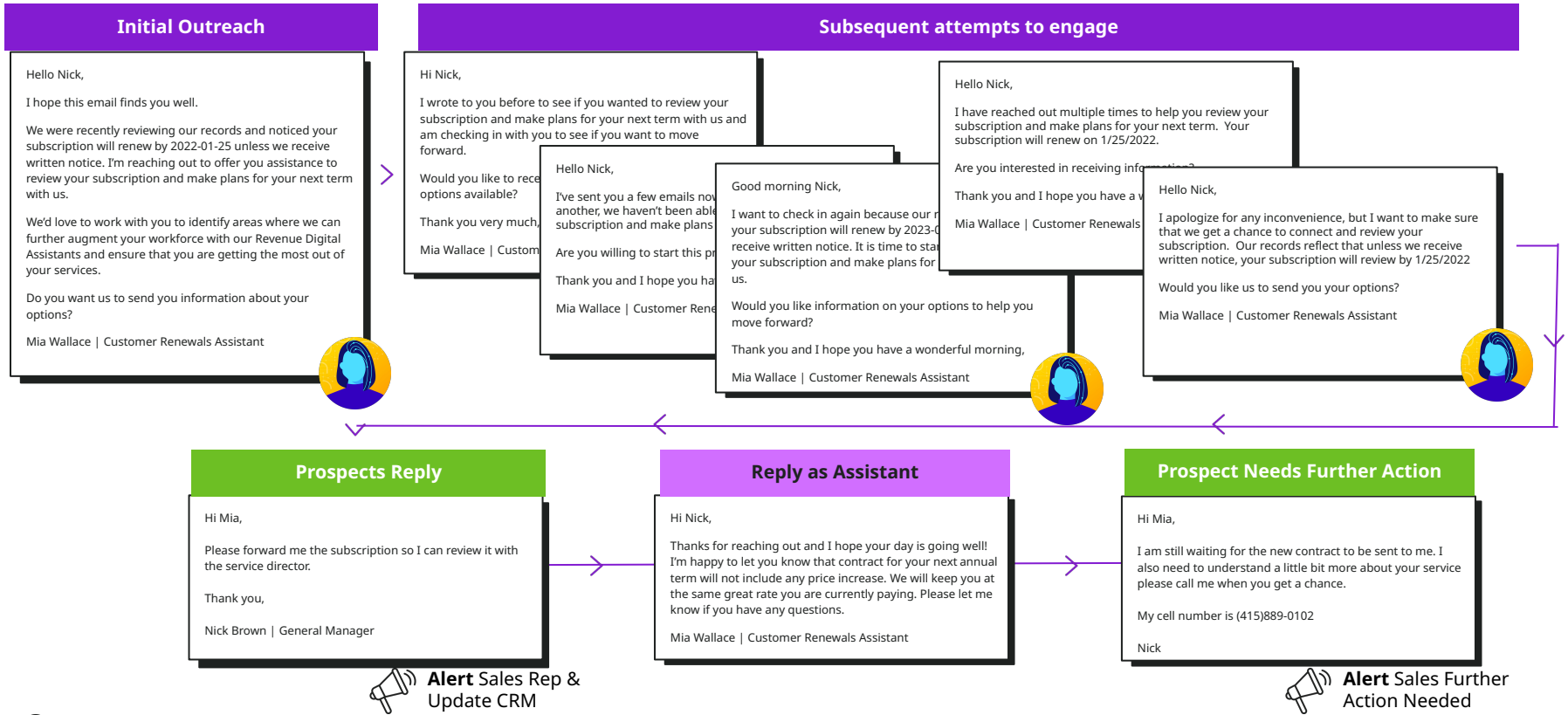
They did. I am getting this info to management to take a look at.

Thanks for the follow-up,
Sam

Mark lead as satisfied in CRM

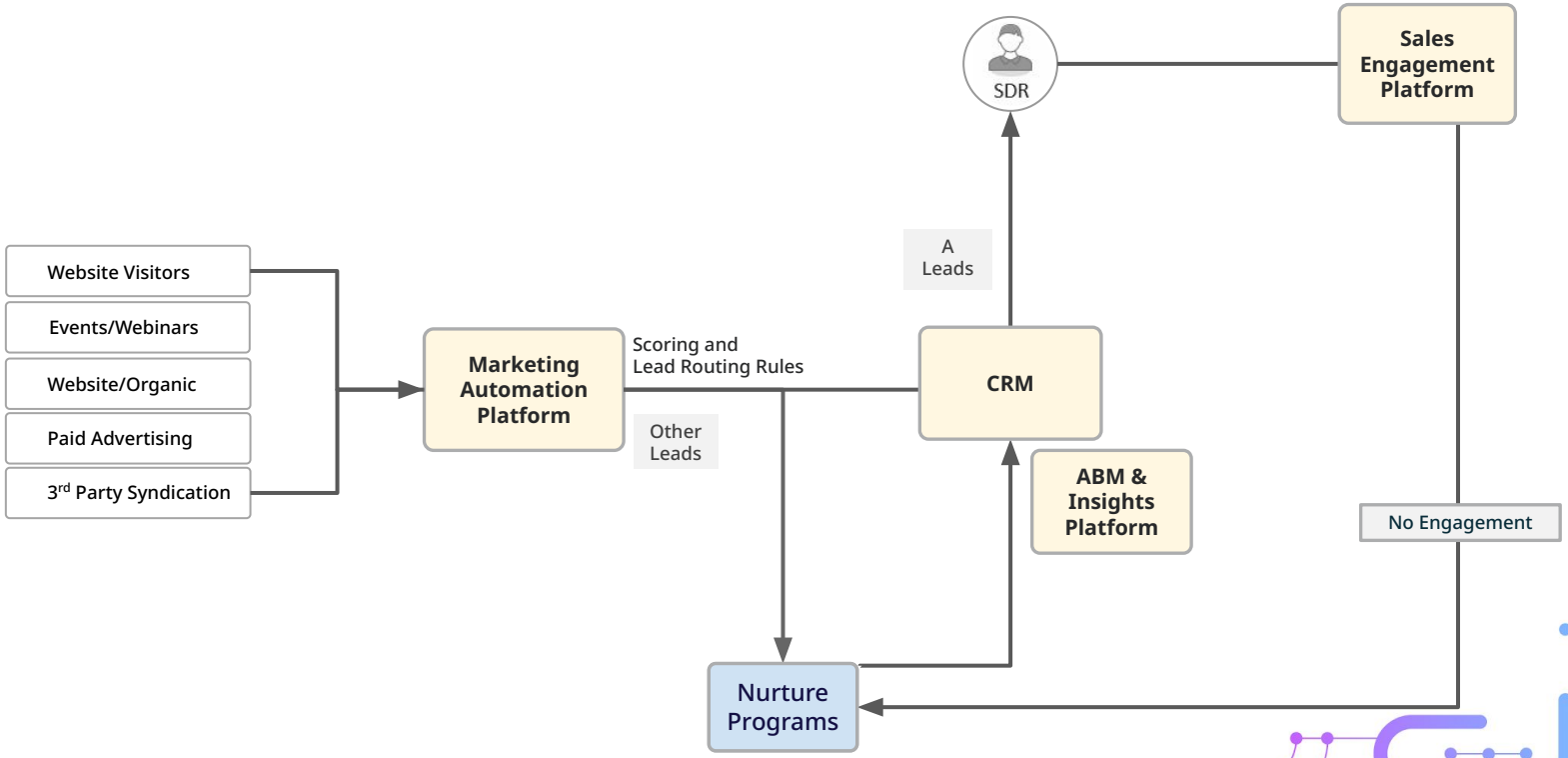
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Conversica RDA for Customer Success in Action



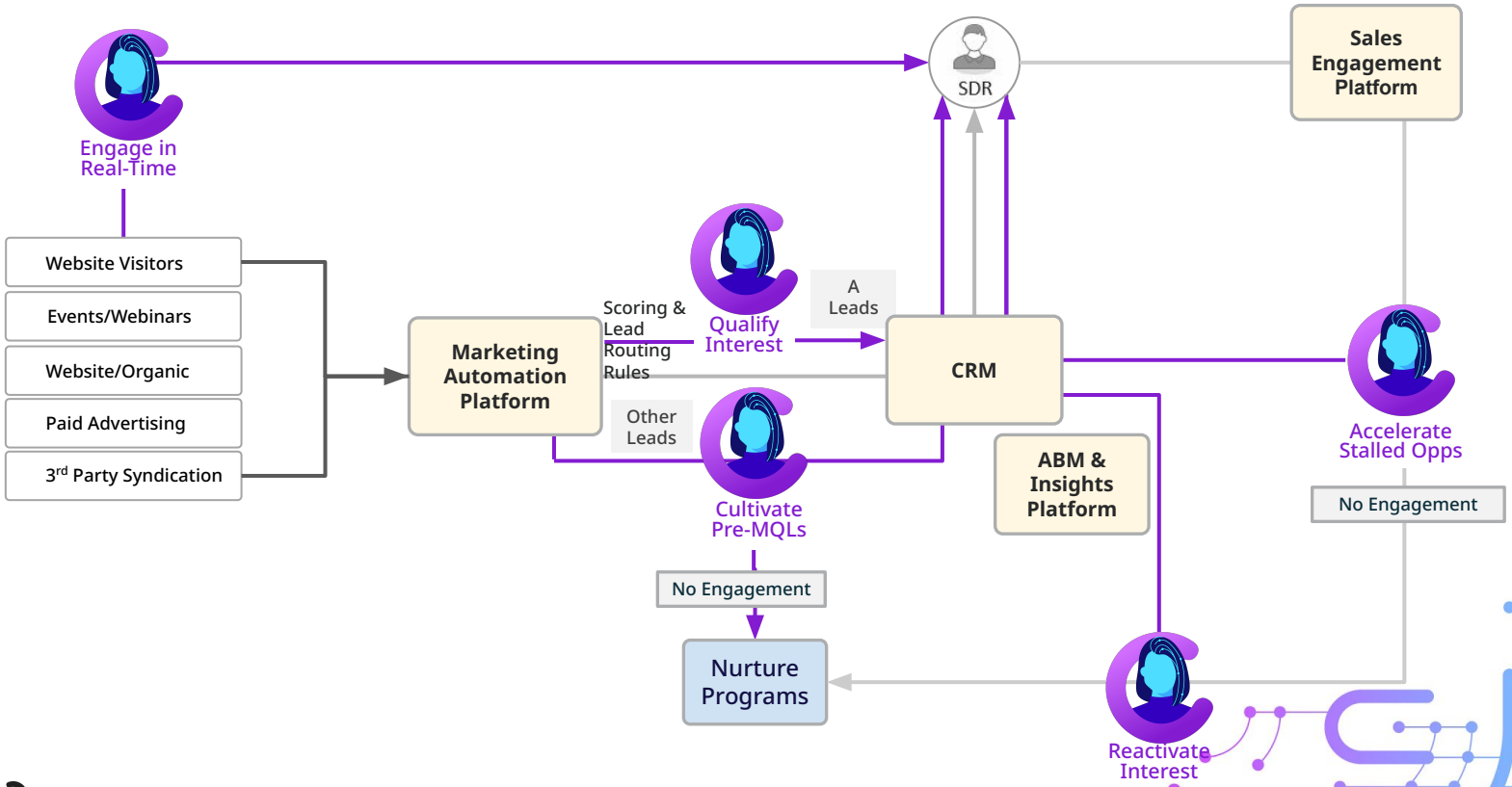
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Historic Lead Management Process



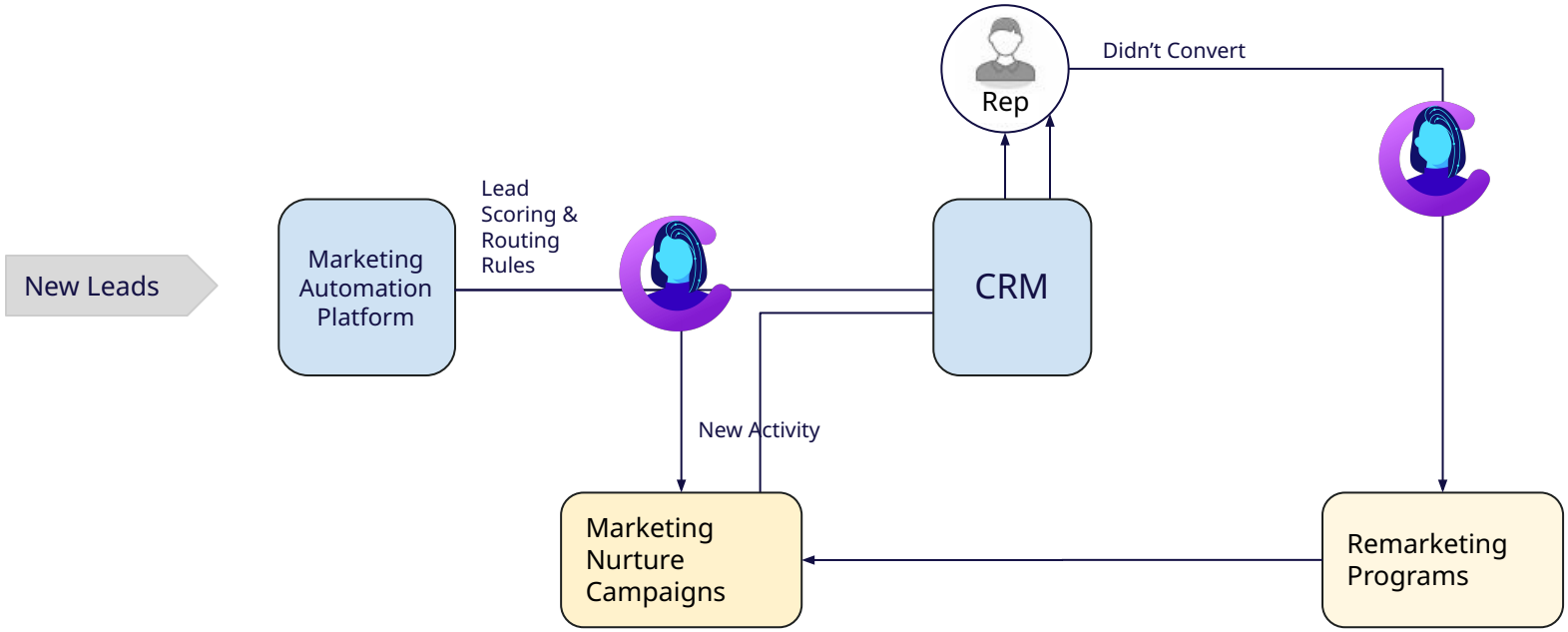
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Lead Management Process with Conversica



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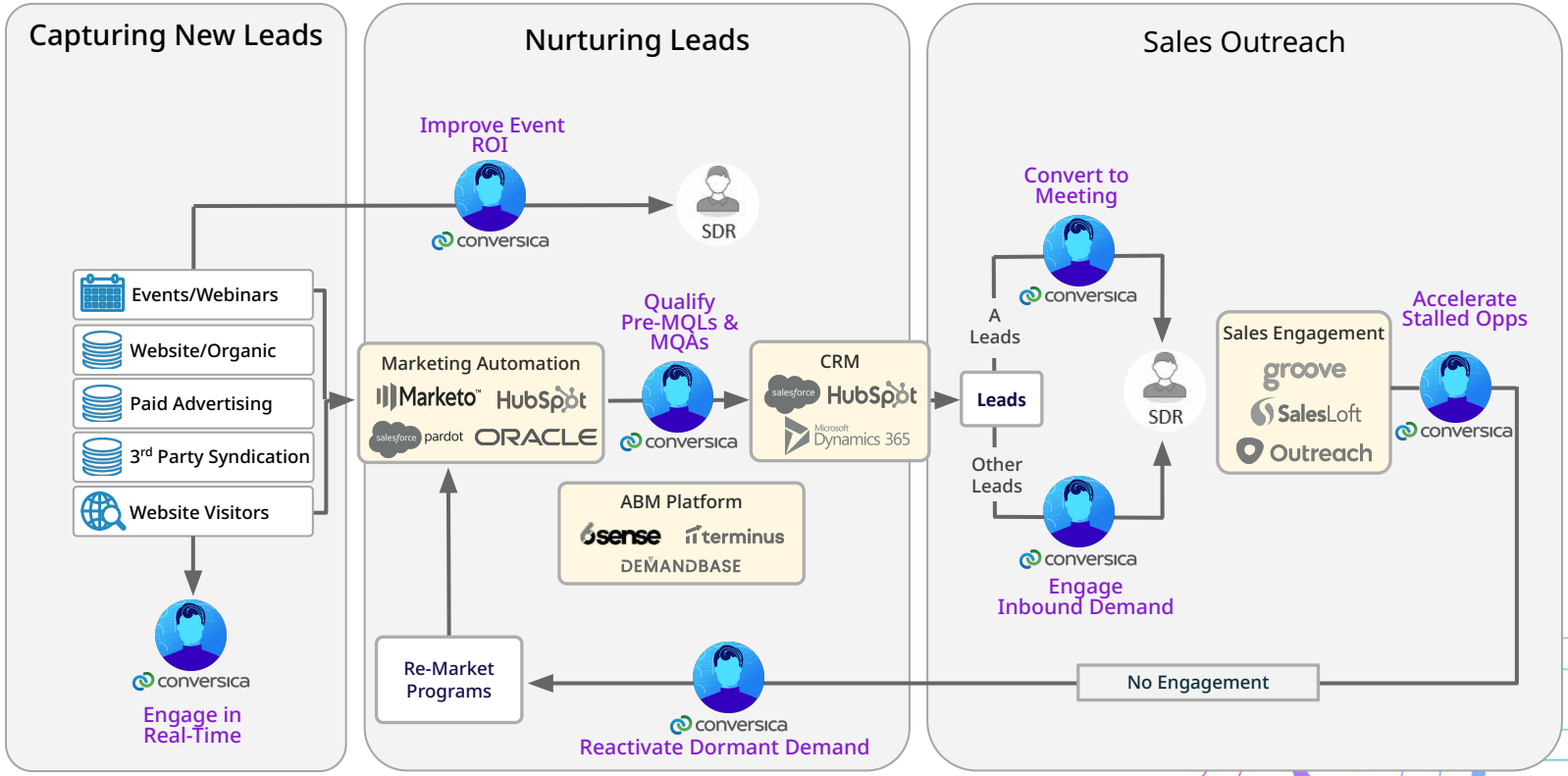
Elevating Your Lead Management Process



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Conversational AI Can Help…



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