AI Sales Assistant Reporting

Introduction

As a Total Expert marketing administrator, you need to communicate effectiveness of the AI Sales Assistant (AISA) to your organization. Total Expert provides granular AISA activities available to you in standard reports (**Reporting & Analytics → Standard Reports**). New standard reports are available every Monday, and your AISA report provides you with AISA activities for the previous 90 days of report generation.

The tips below help you filter and define specific success metrics. Download the standard report, apply filters to the columns, and perform the tasks to generate the corresponding metric. This report also allows you review AISA-specific activities at the LO or consumer level.

AISA Reporting Instructions

> **Tip**
> You can get specific data for an individual TE loan officer for any of the metrics in the table below by adding a filter on the `lo_name` column.

Metric	Filter Settings
Lead Volume	• `Note_type` = ODC Action or Loan ODC Action • `Formatted_note` = Select all "Start" ODCs for the specific use case (for example, Rate Alert) • `Journey_name` = Select the journey for the specific use case (for example, Rate Alert)
Outreach Attempts	• `Note_type` = Insight Info • `Formatted_note` = Select all options for the specific use case (for example, Rate Alert Call) • `Journey_name` = Select the journey for the specific use case (for example, Rate Alert)

Conversations Held	• `Note_type` = Insight Info
	• `Formatted_note` = Select the following for the specific use case:
	    ○ Completed
	    ○ Completed Appointment Scheduled
	    ○ Completed Live Transfer
	    ○ Completed Stop Calling
	• `Journey_name` = Select the journey for the specific use case (for example, Rate Alert)

Transfers/ Meetings Scheduled	• `Note_type` = Insight Info
	• `Formatted_note` = Select the following for the specific use case:
	    ○ Completed Appointment Scheduled
	    ○ Completed Live Transfer
	• `Journey_name` = Select the journey for the specific use case (for example, Rate Alert)

Metric	Filter Settings

Loans Created (#) and Loan Volume - All ($$)	• `Note_type` = Insight Info
	• `Formatted_note` = Select the following for the specific use case:
	    ○ Completed Appointment Scheduled
	    ○ Completed Live Transfer
	• `Journey_name` = Select the journey for the specific use case (for example, Rate Alert)
	• `Loan_number` = Remove blanks

Loan Volume - Funded ($$)	• `Note_type` = Insight Info
	• `Formatted_note` = Select the following for the specific use case:
	    ○ Completed Appointment Scheduled
	    ○ Completed Live Transfer
	• `Journey_name` = Select the journey for the specific use case (for example, Rate Alert)
	• `Loan_number` = Remove blanks
	• `Loan_Status` = Select the status(es) that reflect a funded loan (refer to TE organization setting)

Common Stats to Track

Metric	Purpose	Method to Obtain Metric
% Lead to Transfer	Demonstrate how often AISA is successful in getting an LO on the phone with a lead	Transfers/Meetings Scheduled ÷ Lead Volume
% Lead to Loan Started	Demonstrate how many AISA leads in total have a loan started	Loans Created (#) ÷ Lead Volume
% Transfer to Loan	Demonstrate success rate of getting a loan started once an LO is engaged with the lead	Loans Created (#) ÷ Transfers/Meetings Scheduled