AI Sales Assistant for Loan Officers

About the AI Sales Assistant (AISA)

- Calls your contacts and past borrowers for specific opportunities with the intent of acting quickly and effectively.
- Is conversational and compliant.
- Only calls during specific hours.
- Can forward calls to you or schedule appointments for you to reach out later.
- Never takes breaks, never gets flustered, and never gets nervous.

Get Set Up for Success

- Save the “Money Line” in your phone.
- Set up Outlook rules to ensure you are not missing emails alerting you to scheduled appointments and updates to contact records.
- Consider how you manage your calendar, leaving “Free” time to be available for appointment scheduling.
- Call the demo number to get familiar with the experience that your contacts are going through.
- When talking to your contacts, refer to the AI Sales Assistant by name. That is how your contacts will know it.

FAQ

What are the outcomes of an AI Sales Assistant call?

- The assistant forwards the call to you directly to speak with the contact.
- It schedules an appointment on your calendar to call the contact later if you’re not available to speak in the moment.
- It leaves a voicemail for the contact and will call again later.
- Dial No Answer, Dial Failed, Dial Busy – the agent will call back.
- Stop Calling/Last Call.

Where can I see the AI Sales Assistant activity in Total Expert?

- The recording and transcript are available on the contact record. The recording can be played within the platform or downloaded and played on your computer’s media player.
- Specific responses that the contact gave to questions asked by the assistant are available in the *Responses* tab of the contact record.
- Contacts may also be visible in AI Sales Assistant-specific pipeline views.
- Reach out to your admin team for additional details on how you can identify AI Sales Assistant activity and how it relates to your contacts.

Which contacts will be called?

- Contacts can be called for a variety of reasons. Some of those ways include, but are not limited to, Customer Intelligence alerts and key milestones related to their loan. Confirm your organization's use cases and parameters with your marketing team.

How can I identify which of my customers are being called by the AI Sales Assistant?

- Common ways to identify those contacts are with groups or by filtering for the AISA Journey using the *Currently Active Journey* data point.
- Reach out to your admin team for the exact specifics on how they are helping you to know which of your contacts are being called by the assistant.

What name will the assistant use to reference the contact?

- The assistant will use the first name field in the contact record. If the contact asks the assistant to call them something different, it will.

When will the AI Sales Assistant make calls?

- Calling hours are set by your organization and are not customizable by user. Calls will be made within allowable hours based on the customer's location, and will largely target times of day with high success rates for getting answers. Check with your admin team for specific details on the days and times that the assistant will call your contacts.

How often will the AI assistant call if it's unable to get in touch with the contact?

- The calling cadence varies across use case and has been specifically researched, built, and tested to provide the optimal results and opportunity for the assistant to make a connection.

What phone number will the agent transfer calls to?

- The cell phone number that is configured in each user's Account Settings page.

What can I do to prevent the agent from scheduling call appointments during certain parts of the day?

- If you mark your calendar as "Busy", you will not have appointments scheduled during that time.
- You will receive attempts for live transfers during the day, which you can either accept or decline.

How does the AI Sales Assistant handle customer inquiries about current rates, credit, qualification, or other loan-specific questions?

- The assistant will state that it is not a licensed loan officer and will direct the contact to speak with the loan officer, rather than provide information that she is not authorized to provide.

What information on the contact's record is the AI Sales Assistant able to reference?

- It looks at multiple fields to qualify the record. This typically includes information that is relevant to the conversation and can be shared compliantly over the phone such as name, funded date, and previous rate.

Will the assistant respond to a text message from the contact?

- No, the assistant does not recognize or respond to text messages.

What happens if the customer identifies the assistant as artificial intelligence?

- The assistant will explain that it is artificial intelligence and the contact can speak to it like a human. If the contact would like to be forwarded directly to the LO, it can do that, too.
- Only 10% of call recipients identify that this is artificial intelligence and even less view that as an issue.

What happens if the contact calls the assistant back?

- If the contact calls the assistant back from the same number the assistant used to originally call them, the assistant will recognize the phone number, contact, and reason they called.
- If the contact returns the call from a different number and the agent can't confirm which contact is calling them, your marketing team has a process in place to capture these customers and get them in contact with you.

Can I get a full transcription of my calls?

- You can view a system-generated summary of the call and listen to the call recording in the Activity Stream on the contact record. If you would like a full transcript of any individual call, please reach out to your admins.

What does conversion look like?

- About 25% of calls convert to a phone call or scheduled appointment.

Can the way the assistant speaks be updated?

- The AI Sales Assistant can take live feedback on pronunciation and will adjust immediately.
- Pronunciation of names and places, sentence structure, use of certain phrases, greetings, and more can also be updated via feedback to your marketing team.

Can loan officers change the AISA's name and personality?

- No, the agent is customized on behalf of the entire organization, not on a "per user" basis.