



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 Number” 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 call transfers during call hours.
- 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 AISA call?

- The AISA forwards the call to you directly to speak with the contact.
- It schedules an appointment on your calendar to call the contact later.
- It leaves a voicemail for the contact and will call again later.

Where can I see the AISA activity in Total Expert?

- The recording and transcript are available on the contact record.
- Contacts may also be visible in AISA-specific pipeline views.

Which contacts will the AISA call?

- Contacts with an active alert powered by customer intelligence.

What phone number will the AISA transfer calls to?

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

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

- If you mark your calendar as “Busy”, you will not be forwarded calls during that time.



What happens if the customer identifies the AISA as an AI bot?

- The bot will explain that it is an AI assistant, 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.

How often do people realize the AISA is a bot?

- Only 10% identify that this is a bot and even less view that as an issue.

What does conversion look like?

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

Will the AISA pronounce difficult names and places?

- Yes, it learns pronunciation.