Complete Client Guide

Your comprehensive guide to maximizing lead intelligence and prospect discovery with Avenir AI

Version 2.0 | October 2025 (Updated)

Avenir AI Client Guide

🎉 **Welcome to Avenir AI!**
Thank you for choosing Avenir AI. This comprehensive guide will help you master every feature of your AI-powered lead intelligence platform.

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1. Getting Started

Initial Setup

When you first access your Avenir AI dashboard, follow these essential steps:

> 💡 **Quick Start Tip:** Complete all three setup steps within your first 15 minutes to ensure optimal performance.

1. **Complete Your Profile**
   - Navigate to Settings (⚙️)
   - Fill in your company information
   - Configure your Ideal Client Profile (ICP)
2. **Test Your Connection**
   - Use the "🧪 Test Connection" button in Settings
   - Verify that leads are being received correctly
   - Check your integration status
3. **Customize Your Email Preferences**
   - Select your preferred email tone
   - Add your booking link (Calendly, etc.)
   - Preview your automated emails

Navigation

Your dashboard has four main sections:

Section	Purpose	Key Features
📊 **Dashboard**	Overview of recent leads	Key metrics, recent activity
💡 **Insights**	Deep analytics	Intent, urgency, trends
🎯 **Prospect Intelligence**	AI-powered discovery	ICP matching, fit analysis
⚙️ **Settings**	Configuration	Profile, email, integration

2. Dashboard Overview

👋 **First-Time Login?**
When you first access your dashboard, you'll see a welcome message with quick tips. This appears only once and guides you through the key features.

Key Metrics at a Glance

Your dashboard displays four real-time metrics at the top:

📈 Total Leads

Count of all leads received through your forms. Updated in real-time as new leads arrive. Includes a trend indicator (▲ or ▼) showing change from previous period.

✨ Average Confidence

AI-calculated score (0-100%) indicating overall lead quality. Higher scores mean more likely to convert. Hover over the "ℹ️ " icon for confidence legend and AI factors used.

🎯 Top Intent

The most common intent across your leads (e.g., "Service Inquiry", "Partnership"). Helps you understand what prospects are looking for.

🔴 High Urgency Count

Number of leads requiring immediate attention. These should be your top priority for follow-up.

7 Status Tabs: Your Lead Pipeline

Leads move through a structured workflow. Use the tabs to view leads at each stage:

Tab	Meaning	Recommended Action
Active	New leads awaiting response	Review and respond ASAP
Contacted	You've sent initial response	Follow up if no reply in 2-3 days
Meetings	Meeting scheduled	Prepare for call/meeting
Converted	Closed as customer	Celebrate! 🎉
No Sale	Not a fit or declined	Archive or revisit later
Archived	Temporarily paused	Review periodically
Deleted	Spam or invalid	No action needed

> 💡 **Pro Tip:** Check the **Lead Distribution** section below the metrics to see percentages across all 7 statuses. This helps you identify bottlenecks in your pipeline.

Smart Filters

Below the tabs, you'll find three powerful filters to narrow your view:

- **Urgency Filter:** Show only High, Medium, Low, or All urgencies
- **Language Filter:** Filter by English (EN) or French (FR) leads
- **Min Confidence Slider:** Drag to show only leads above your chosen confidence threshold (0-100%). Great for focusing on high-quality leads.

Understanding Lead Cards

Each lead card displays comprehensive information:

- **Name & Email** - Contact information (click email to copy to clipboard 📋)
- **Confidence Score** - AI assessment with color-coded badge:
  - 90-100% = Green (Excellent)
  - 70-89% = Blue (Good)
  - 50-69% = Yellow (Fair)
  - Below 50% = Red (Low)
- **Intent** - What the lead is looking for (click to copy 📋)
- **Tone** - Communication style detected (casual, formal, etc.)
- **Language** - EN or FR pill badge
- **Urgency** - Priority level: High 🔴 , Medium 🟡 , or Low 🟢
- **Message Preview** - First few lines of their message
- **Notes Summary** - Shows note count and last updated time (if notes exist)
- **Quick Actions:** Mark Contacted, Book Meeting, Mark Converted, Archive, Delete

> 🔍 **Relationship Insights:**
> Below each lead, you'll find a collapsible **"📈 Relationship Insights"** section. Click the chevron to expand and see lead evolution over time—how confidence, tone, and urgency have changed.

2.5. Predictive Growth Engine

🤖 **AI-Powered Intelligence**
Your dashboard includes a **Predictive Growth Engine**—an AI section that analyzes trends across all your leads to give you strategic insights.

What the Growth Engine Shows

The Predictive Growth Engine displays four key trend cards:

📊 Engagement Trends

Tracks incoming lead volume over time. Look for spikes (campaign success) or drops (need more marketing).

🎯 Confidence Distribution

Shows how many leads fall into High (90+), Medium (50-89), and Low (0-49) confidence ranges. Helps you understand overall lead quality.

💬 Tone Analysis

Breakdown of communication styles: Casual, Professional, Formal, Urgent, Friendly. Adjust your responses accordingly.

🌐 Language Breakdown

Percentage of English vs. French leads. Useful for bilingual businesses to allocate resources.

💡 **Strategic Use:** Review the Growth Engine weekly to spot patterns. If confidence scores are dropping, revisit your form or ICP. If one tone dominates, tailor your email templates to match.

3. Lead Intelligence & Actions

Confidence Scoring: How It Works

Our AI assigns a confidence score based on multiple factors:

1. **Message Quality** - Clear, detailed inquiries score higher
2. **Intent Clarity** - Specific requests score higher
3. **Contact Information** - Complete information scores higher
4. **Urgency Indicators** - Time-sensitive language may boost score
5. **Tone Alignment** - Professional tone often scores higher in B2B

Score Interpretation:
• **90-100%:** Excellent - High likelihood of conversion. Prioritize these!
• **70-89%:** Good - Strong potential lead. Follow up within 24 hours.
• **50-69%:** Fair - Needs qualification. Ask clarifying questions.
• **Below 50%:** Low - May require nurturing or could be low-intent.

💡 **Confidence Legend:** Hover over the "ℹ️" icon next to *Average Confidence* at the top of your dashboard to see a legend explaining the 0-100 scale and what AI factors are used.

Urgency Levels & Response Times

Level	Icon	Response Time	Action
High Urgency	🔴	Within hours	Immediate follow-up required
Medium Urgency	🟡	1-2 days	Priority follow-up
Low Urgency	🟢	3-5 days	Standard timeline

Quick Actions: Moving Leads Through Your Pipeline

Each lead card has action buttons to update status:

- ✓ **Mark Contacted:** Moves lead to "Contacted" tab
- 📅 **Book Meeting:** Moves lead to "Meetings" tab
- ✓ **Mark Converted:** Moves lead to "Converted" tab
- 📁 **Archive:** Moves lead to "Archived" tab
- 🗑️ **Delete:** Moves lead to "Deleted" tab (use for spam)

> ⚠️ **Important:** These actions update lead status *only*. To add notes or detailed history, click the lead to view full details.

Relationship Insights: Lead Evolution

Click the chevron (▼) next to **"📈 Relationship Insights"** on any lead card to see:

- **Confidence History:** How AI's assessment of the lead has changed over time
- **Tone History:** Shifts in communication style (e.g., casual → professional)
- **Urgency History:** Whether urgency increased or decreased
- **AI Summary:** Key observations about the lead's journey

> 💡 **Best Practice:** Review Relationship Insights before important follow-ups. If a lead's confidence dropped, they may need re-engagement. If urgency increased, prioritize them immediately.

4. Prospect Intelligence

What is Prospect Intelligence?

Avenir AI automatically discovers and analyzes potential customers in your industry, scoring them based on how well they match your Ideal Client Profile (ICP).

> ✅ **Key Benefit:** Save hours of manual research. Our AI finds and qualifies prospects automatically while you focus on closing deals.

ICP Match Scoring

Each prospect receives an **ICP Match Score** (0-100):

Score Range	Quality	Recommendation
90-100	Excellent Match	Top priority prospects
70-89	Good Match	Strong potential
50-69	Fair Match	May require qualification
Below 50	Low Match	Outside ideal profile

Business Fit Analysis

When you click "📊 View Proof" on a prospect, you'll see:

- **ICP Match Score** - AI-calculated fit based on your ideal client profile
- **AI Reasoning** - Detailed explanation of why the prospect matches
- **Business Information** - Company details, industry, region
- **Automation Score** - How much they could benefit from your services

💡 **Best Practice:** Focus on prospects with 70+ scores for the best conversion rates. Use the "Show Only Strong Match" filter for efficiency.

5. Settings & Configuration

Company Information

- **Industry Category** - Your primary business sector
- **Primary Service** - Your main service offering
- **Booking Link** - Your Calendly, Acuity, or other scheduling link

Ideal Client Profile (ICP)

Defining your ICP helps Avenir AI find the best prospects:

1. **Target Client Type** - Be specific for better matching
2. **Average Deal Size** - Typical contract value (optional)
3. **Main Business Goal** - What you're trying to achieve
4. **Biggest Challenge** - Your main obstacle

⚠️ **Important:** The more detailed your ICP, the better quality prospects you'll receive. Update your ICP as your business evolves.

Email Preferences

Choose from **4 distinct email tones**:

Tone	Best For	Style
Professional	B2B, Corporate	Business-focused, polished
Friendly	Local businesses, Consumer	Warm, approachable
Formal	Legal, Financial	Traditional, respectful
Energetic	Creative, Startups	Enthusiastic, dynamic

6. Email Customization

Professional Tone Example

> *"Thank you for your inquiry. We've reviewed your message and would be pleased to discuss how our services can support your business objectives."*

Friendly Tone Example

> *"Thanks so much for reaching out! We're excited to hear from you and would love to help with your project."*

Email Components

Every automated email includes:

- ✅ Personalized greeting with lead's name
- ✅ Acknowledgment of their message
- ✅ Service context and expertise
- ✅ AI summary reference
- ✅ Clear next steps
- ✅ Booking link (if configured)
- ✅ "Powered by Avenir AI 🧠 " branding

> 💡 **Always Preview:** Before finalizing settings, click "👁️ Preview Email" to see how your email will look.

7. Best Practices

Maximizing Lead Conversion

1. **Respond Quickly** - Set follow-up speed to "Instant" for best results
2. **Personalize Follow-up** - Review AI insights before responding
3. **Complete ICP Profile** - Detailed ICP = better prospect matches
4. **Regular Dashboard Checks** - Check at least twice daily
5. **Optimize Email Tone** - Test different tones with A/B testing

✅ **Success Formula:** Fast Response + Personalization + Strong ICP = Higher Conversion Rates

Daily Workflow Checklist

Time	Task	Duration
Morning	☕ Check dashboard for overnight leads	5 min
Morning	🔥 Respond to high-urgency leads	15 min
Midday	📊 Review confidence scores and AI insights	10 min
Afternoon	📧 Follow-up on priority leads	20 min
Weekly	🎯 Review new prospects	30 min
Monthly	⚙️ Optimize settings based on results	1 hour

8. Troubleshooting

Common Issues

Issue: Not receiving leads

Solutions:

- Check Integration Status in Settings
- Verify API key is correct
- Run "Test Connection" to verify setup
- Contact support if test fails

Issue: Confidence scores seem low

Solutions:

- Review your form fields - ensure detailed message collection
- Add context questions to your form
- Low scores indicate leads need qualification (not always bad)

Issue: Prospects don't match my business

Solutions:

- Review and update your ICP in Settings
- Be more specific in "Target Client Type"
- System learns over time - give it 1-2 weeks to improve

9. Frequently Asked Questions

General Questions

Q: What is Avenir AI?

A: Avenir AI is an intelligent platform that combines lead management with AI-powered prospect discovery. It helps you capture, analyze, and convert leads while automatically finding new potential customers.

Q: How does the AI work?

A: Our AI uses advanced natural language processing (GPT-4o-mini) to analyze lead messages, detect intent and urgency, calculate confidence scores, and match prospects to your business profile.

Q: Is my data secure?

A: Yes. All data is encrypted, stored securely in enterprise-grade infrastructure, and isolated per client.

Lead Management

Q: How quickly are leads processed?

A: Leads are processed in real-time. From form submission to dashboard display takes less than 5 seconds.

Q: Can I disable automated emails?

A: Yes! In Settings, turn off "Enable AI Personalized Replies". Leads will still be captured but no automated email will be sent.

Prospect Intelligence

Q: How often are new prospects added?

A: New prospects are discovered and added weekly. The system continuously scans for businesses matching your ICP.

Q: What does the ICP Match Score mean?

A: It's a 0-100 score indicating how well a prospect fits your ideal client profile. Higher scores mean better alignment with your criteria.

Need Help?

Email: contact@avenirаisolutions.ca | Website: https://www.avenirаisolutions.ca

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Version 1.0 | October 2025