



Complete Client Guide

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

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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

Key Metrics

Total Leads

Count of all leads received through your forms. Updated in real-time as new leads arrive.

Average Confidence




AI-calculated score (0-100%) indicating lead quality. Higher scores mean more likely to convert.

Recent Activity

Latest leads with quick view of name, email, and confidence score.

Understanding Lead Cards

Each lead card displays the following information:


- **Name & Email** - Contact information
- **Confidence Score** - AI assessment of lead quality (0-100%)
- **Intent** - What the lead is looking for (e.g., "Partnership", "Service Inquiry")
- **Urgency** - Priority level: High , Medium , or Low 
- **Message Preview** - First few lines of their message

3. Lead Insights

Intent Distribution

Shows what your leads are looking for:

- **Service Inquiries** - Customers looking for your services
- **Partnerships** - Potential collaboration opportunities
- **Information Requests** - General inquiries
- **Custom Intents** - Specific to your industry

 **Pro Tip:** Use intent distribution to tailor your follow-up strategy. If most leads are service inquiries, focus on showcasing your service benefits.

Urgency Breakdown

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

Confidence Scoring

Our AI assigns a confidence score based on:

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 requests may score higher

Score Interpretation:

- **90-100%:** Excellent - High likelihood of conversion
- **70-89%:** Good - Strong potential lead
- **50-69%:** Fair - Needs qualification
- **Below 50%:** Low - May require nurturing

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@aveniraisolutions.ca | Website: <https://www.aveniraisolutions.ca>

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