AI Tag Conversation

Smarter Conversations, Faster Deals

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1758200760/4b9bedb4c5b45fc612b7dd6705e3/AITags.png?expires=1770723900&signature=66bc1d1699d12ad0a4ddc19c66c93f6a6e16e26bfb33698e8287e8d6978e5054&req=d$

We're excited to announce the launch of **AI Tag Conversation**, a powerful new feature that helps you automatically organize and act on your sales conversations.

Instead of spending hours manually tagging replies, our AI now does the heavy lifting for you. By analyzing every message, it applies the right tags instantly—so you know exactly where each lead stands in their journey. This not only saves you time but also speeds up your follow-ups, helping you **close more deals, faster**.

How It Works

The new **AI Tags section** inside the **AI Playbook** gives you full visibility and control:

🔖 Default AI Tags

We've included essential tags that automatically detect the most common outcomes of a conversation:

- **Interested**
- **Not Interested**
- **Bad Timing**
- **Meeting Booked**
- **Not the Target Persona**
- **Out of Office**
- **Referred**

These default tags can't be deleted or edited to ensure consistency, but you can **duplicate and activate/deactivate** them depending on your workflow.

Tag Categories

To make tracking simpler, all tags are grouped into **three categories**:

- **Positive** – e.g., Interested, Meeting Booked
- **Neutral** – e.g., Referred, Out of Office
- **Negative** – e.g., Not Interested, Bad Timing

This means that on the **Analytics Page**, users can track a single metric per category. For example, all Positive tags can be aggregated into one main metric for easier reporting.

Manual Tags

You can also create your own custom tags. For each manual tag, you'll be able to:

- Add a custom **prompt** (so AI knows when to apply it)
- Assign a **category** (Neutral, Positive, or Negative)
- Activate or deactivate it anytime
- Delete or create new ones as your needs evolve

⚠️ *Important:* Manual AI tags must have a prompt associated before they can be activated.

Compatibility

To ensure accurate tracking, AI uses a **compatibility matrix** that controls how tags interact:

- A conversation can have **multiple tags** at the same time (e.g., **Bad Timing** and **Interested**).
- Tags are automatically updated as the conversation evolves—if the context changes, relevant tags are added or removed.
- This ensures your analytics remain accurate while reflecting the full status of each conversation.

Where You'll See AI Tags

- **Inbox**: AI tags appear directly in your replies, so you instantly know the context. For example, if a lead replies with *"Let's connect again next quarter"*, the AI will tag it as **Bad Timing**. You can always remove a tag if it doesn't fit.
- **Analytics Page**: Tag metrics are now tracked by **category** (Positive, Neutral, Negative), helping you quickly understand patterns in replies across campaigns. You'll also see individual tag counts for more granular insights.

👉 For existing clients: If you've already been using manual tags (e.g., "Interested"), your previous results will automatically be merged with the new AI Tags—so your historical data stays consistent.

Key Benefits

✅ **Save hours of manual work** – AI automatically handles tagging for you.

✅ **Faster follow-up** – Instantly know which leads to prioritize.

✅ **Smarter analytics** – Gain insights into conversations across campaigns.

✅ **Consistency across teams** – Everyone uses the same set of structured tags.

COMMON QUESTIONS

1. Can I edit or delete the default AI tags?

No, default tags can't be edited or deleted. However, you can duplicate them and deactivate any you don't need.

2. How do manual tags work?

You create a tag, add a prompt that tells AI when to apply it, then activate it. Without a prompt, the tag cannot be activated.

3. Will my old "Interested" tag data be lost?

Not at all. Any existing client who already used "Interested" will see their results automatically merged into the new AI Tags system.

4. Can I track performance of tags across campaigns?

Yes. The Analytics Page now includes AI Tag metrics, so you can see exactly how leads are categorized and how that impacts your pipeline.

🚀 With AI Tag Conversation, you can finally eliminate the guesswork and focus on what really matters: closing deals.