

## Lead Generation Virtual Chat Agent.

### Objective :

#### Objectives for a Lead Generation Virtual Chat Agent

1. **Increase Lead Acquisition Efficiency:** Automate the process of capturing and qualifying leads to maximize conversion rates while reducing human effort.
2. **Provide 24/7 Availability:** Ensure uninterrupted service to engage with potential leads at any time, regardless of time zones or business hours.
3. **Enhance User Engagement:** Deliver personalized and interactive responses to keep prospects engaged and guide them effectively through the sales funnel.
4. **Streamline Lead Qualification:** Gather essential information from prospects, segment them based on predefined criteria, and hand off high-quality leads to the sales team.
5. **Improve Customer Experience:** Offer instant assistance to potential clients, reducing response time and creating a positive impression of the brand.
6. **Integrate Seamlessly with CRM Tools:** Ensure easy integration with existing CRM systems to organize, track, and follow up on leads efficiently.
7. **Optimize Lead Conversion Metrics:** Continuously analyze user interactions to identify patterns and improve conversion strategies through data-driven insights.
8. **Reduce Operational Costs:** Minimize the need for human intervention in lead generation, thereby reducing overheads and operational expenses.

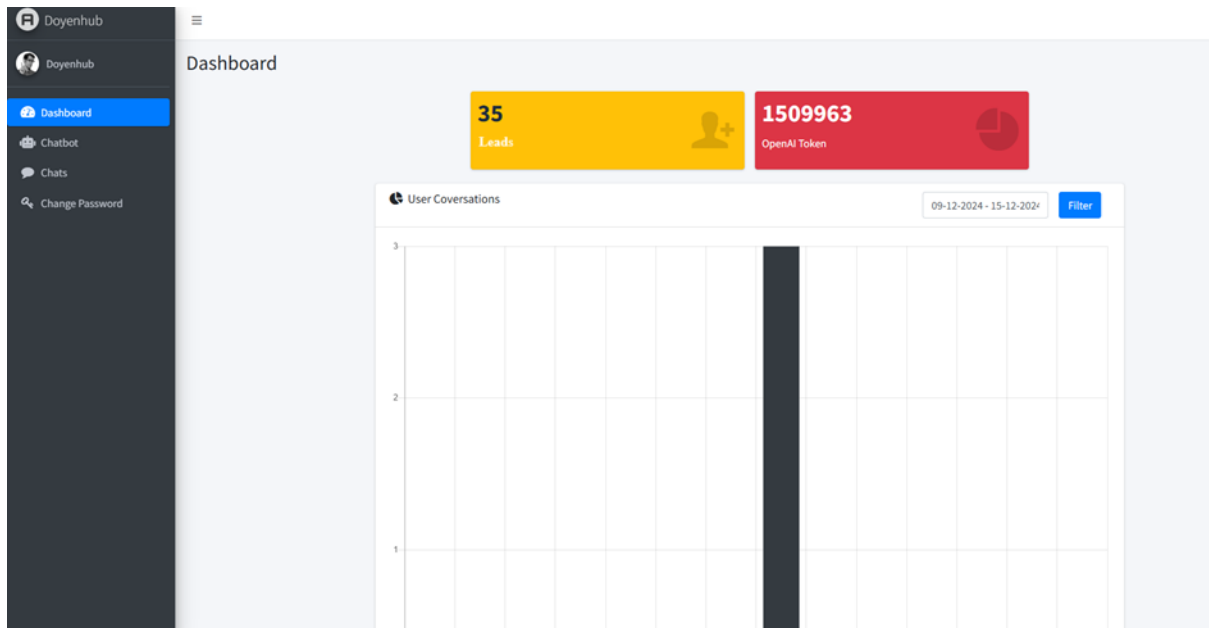
### Development Strategy

1. **Data Preparation:**
  - Extract and preprocess data from Customer Service portfolio documents using NLP techniques.
  - Store processed data in a structured format using **ChromaDB** for efficient querying.
2. **Chatbot Development:**
  - Integrate OpenAI or Google Gemini as the backend to ensure high-quality NLP responses.
  - Implement a conversational memory mechanism for retaining context.
  - Efficient processing of unstructured document data
3. **Frontend Integration:**
  - Develop a user-friendly interface with functionality to select backend services dynamically.
4. **Testing and Optimization:**
  - Validate accuracy with various queries and documents.
  - Optimize response time and memory utilization.

### Features we implemented

#### Admin Dashboard

Give number of leads and token usages date wise or custom date range.



## Virtual Agent Training:

upload your services and portfolio files to train model. It is supporting .PDF, .Docx, .txt file format.

The screenshot shows the 'Edit Chatbot' interface in Doyenhub. The sidebar is the same as the dashboard. The main content area is titled 'Edit Chatbot' and has a breadcrumb trail: 'Dashboard / Chatbot / Chatbot Details'. A progress bar at the top shows four steps: 1. Chatbot Details, 2. Data Sources (current step), 3. Train Chatbot, and 4. Review. The 'Data Sources' section has two tabs: 'Text' and 'Files'. The 'Text' tab is active, showing a text area with sample Q&A pairs. At the bottom, there are 'Previous' and 'Train Chatbot' buttons.

## Training using Files

The screenshot shows the 'Edit Chatbot' interface in Doyenhub, specifically the 'Files' tab. The sidebar and progress bar are the same as the previous screenshot. The 'Files' tab is active, showing a list of 'Existing Files'. One file, 'Machine Learning Portfolio\_1721714543.pdf', is listed with a 'Trained' status. Below the list is an 'Upload File' button and a note: 'Supported file formats: pdf, docx, doc'. At the bottom, there are 'Previous' and 'Train Chatbot' buttons.

## Agent Settings

Admin can set base template and prompt template and other fields.

The screenshot shows the 'Edit Chatbot' page in the Doyenhub admin interface. The left sidebar contains navigation links: Doyenhub, Dashboard, Chatbot (selected), Chats, and Change Password. The main content area is titled 'Edit Chatbot' and includes a breadcrumb trail: Dashboard / Chatbot / Chatbot Edit. A progress bar at the top indicates four steps: 1. Chatbot Details (active), 2. Chatbot Configuration, 3. Chatbot Training, and 4. Chatbot Deployment. The 'Chatbot Details' section contains the following fields:

- Name \***: A text input field with 'Doyenhub' entered. Below it, a small text says 'Enter a name for the chatbot.'
- Display Name (optional)**: A text input field with 'AI Assistant' entered. Below it, a small text says 'Name shown to users on your Chat Widget.'
- Sub-heading**: A text input field with 'Enter sub-heading' entered. Below it, a small text says 'Enter the sub-heading for the chatbot.'
- Initial Message \***: A text input field with 'Hi! What can I help you with?' entered. Below it, a small text says 'Enter the initial message for the chatbot.'
- Base System Prompt \***: A text area containing the following text:  
I want you to act as a document that I am having a conversation with. Your name is 'AI Assistant'. You will provide me with answers from the given context :  
context = {context\_str}  
  
Don't mention developer's name in any chat use "we".  
Below the text area, a small text says 'Enter the base system message for the chatbot.'

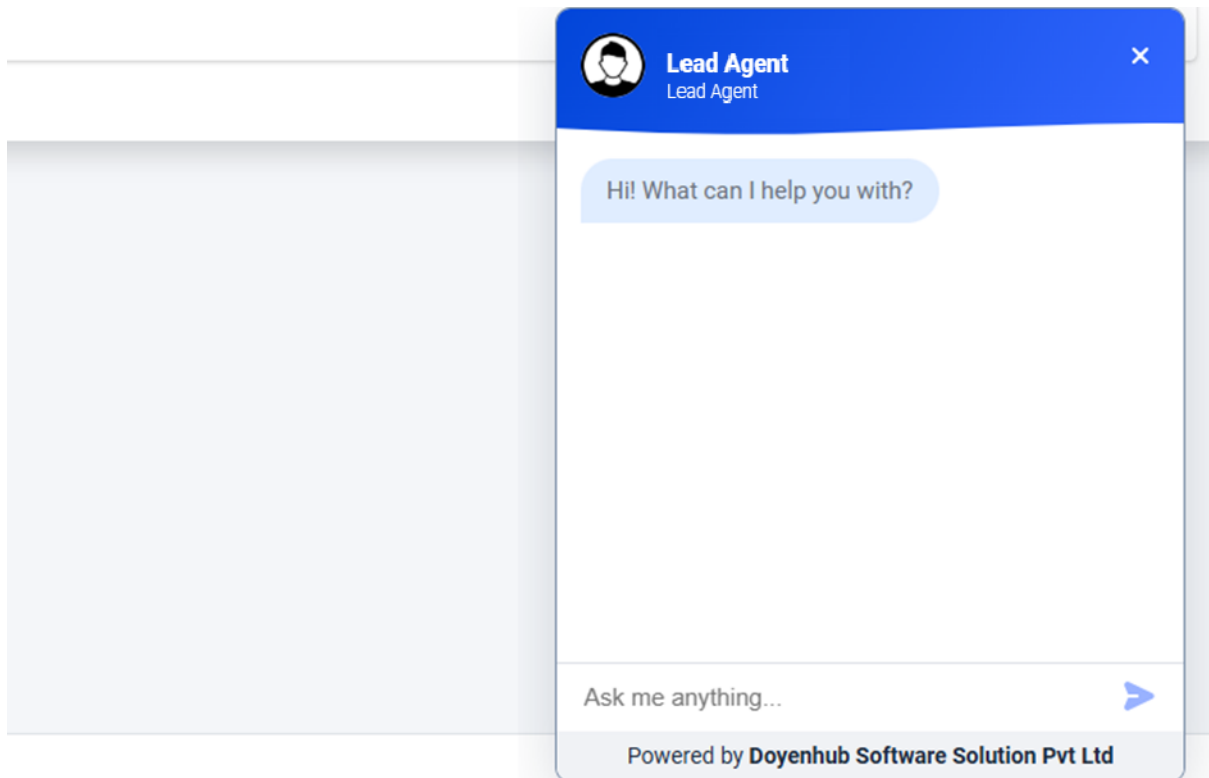
At the bottom of the form, there is a link 'Show Advanced Settings' with a downward arrow, and two buttons: 'Update Chatbot' and 'Next'.

## Virtual Agent Interface

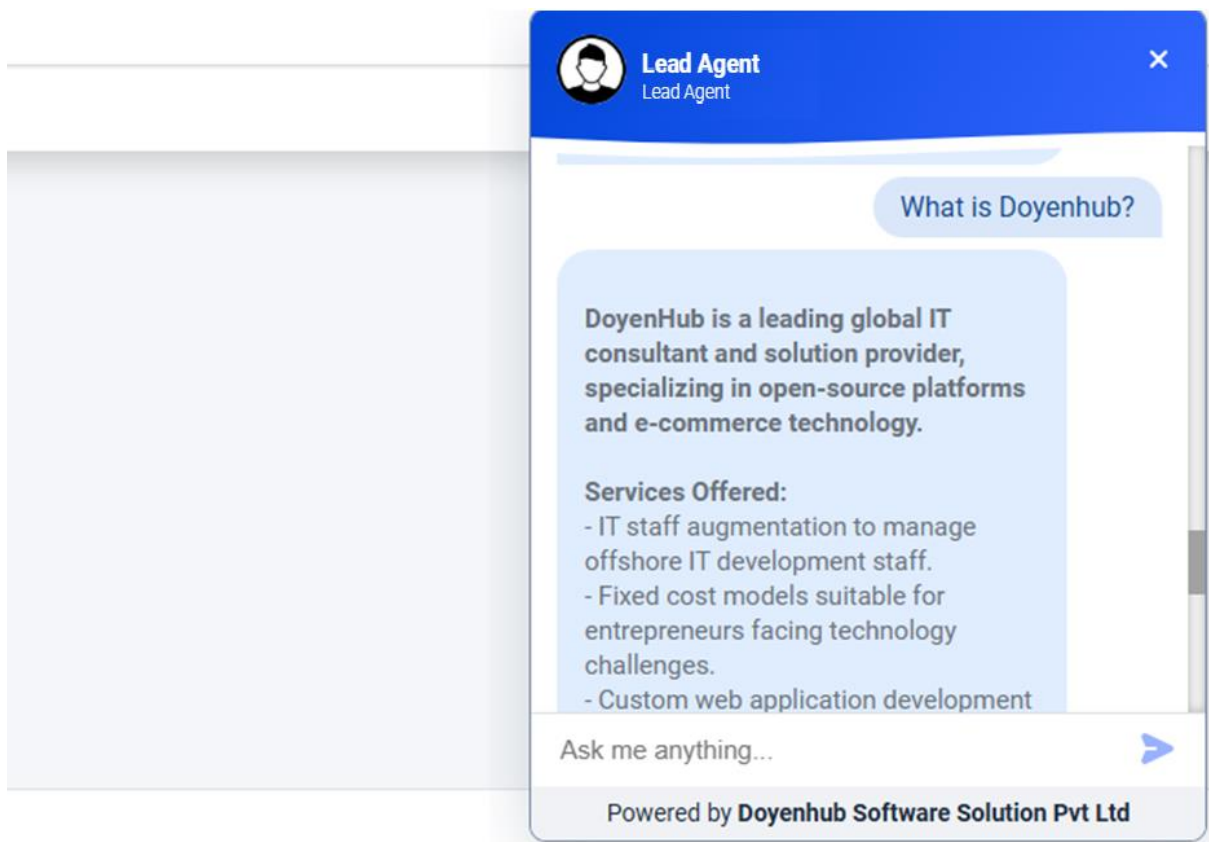
First time it ask for Details :


The screenshot shows the 'Lead Agent' virtual interface. At the top, there is a blue header with a profile icon, the text 'Lead Agent', and a close button (X). Below the header, the text 'Hi 🤖, Please fill out the form below to start chatting' is displayed. The form consists of three input fields: 'Name\*', 'Email\*', and 'Phone Number'. Below these fields is a large blue button labeled 'Start Chat'. Underneath the button, there is a link: 'Start chatting without fill up form'. At the bottom of the interface, there is a footer that reads 'Powered by Doyenhub Software Solution Pvt Ltd'.

Once details are filled :



Question ask “what is Doyenhub”



**Lead Agent**  
Lead Agent

social media channels: Facebook, Twitter, LinkedIn, and Instagram. We look forward to hearing from you!


In which segment are you working?

**We are working across various business verticals, including:**  
  
EdTech (Robofun) – B2B  
  
FinTECH/Banking/Financial Services  
  
Insurance

Ask me anything... ➤

Powered by **Doyenhub Software Solution Pvt Ltd**

Query : What is your AI development expertise

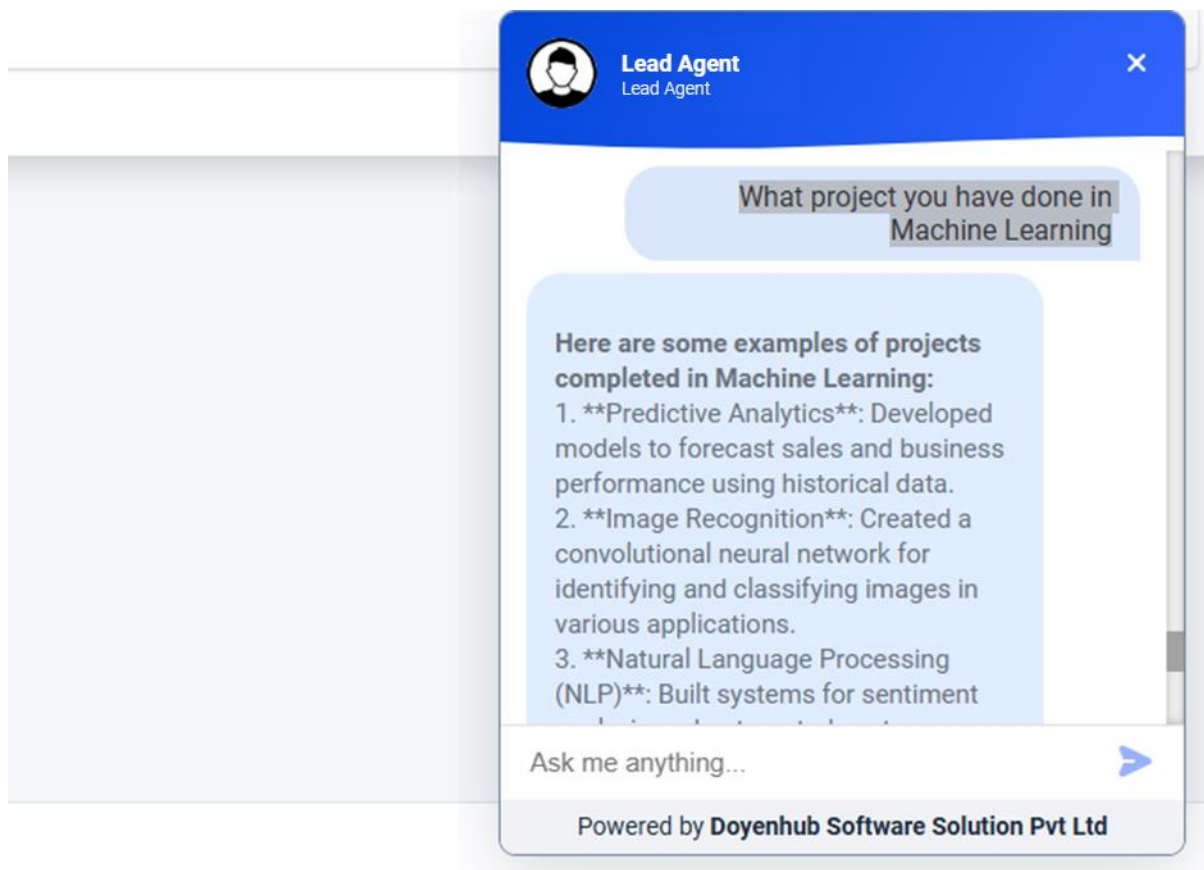
**Lead Agent**  
Lead Agent

What is your AI development expertise?

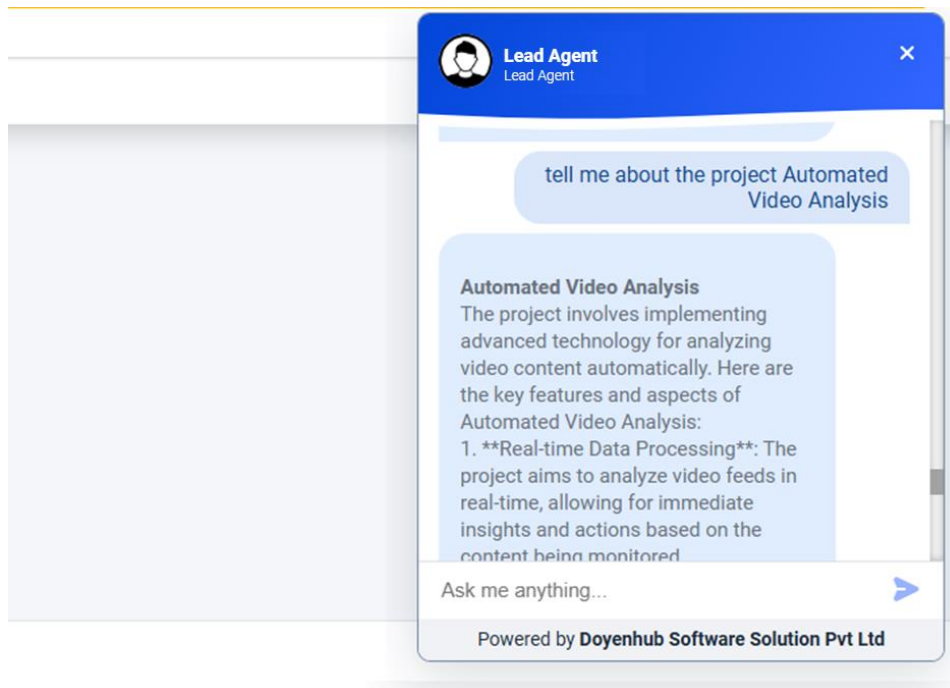
**Our AI development expertise includes:**  
- AI and ML Solutions: We harness the power of Artificial Intelligence (AI) and Machine Learning (ML) to drive innovation and transform businesses.  
- Custom Chatbots: We develop tailored chatbots that enhance customer engagement and operational efficiency.  
- Predictive Analysis: Our solutions

Ask me anything... ➤


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Query : Getting details of project.



Query: How can I contact you?

**Lead Agent**  
Lead Agent

How can I contact you?

**To contact us, you can use the following methods:**

Email: [contact@doyenhub.com](mailto:contact@doyenhub.com)

Phone (Sales): (+01) – 301 685 0016

Phone (Sales): (+91) – 942 839 1927


Phone (HR): (+91) – 958 614 3431

Feel free to reach out anytime!

Ask me anything... >

Powered by **Doyenhub Software Solution Pvt Ltd**

Query: I want to connect Sales representative, Could you please book appointment with him today or tomorrow?

**Lead Agent**  
Lead Agent

Hello

Hello! How can I assist you today?

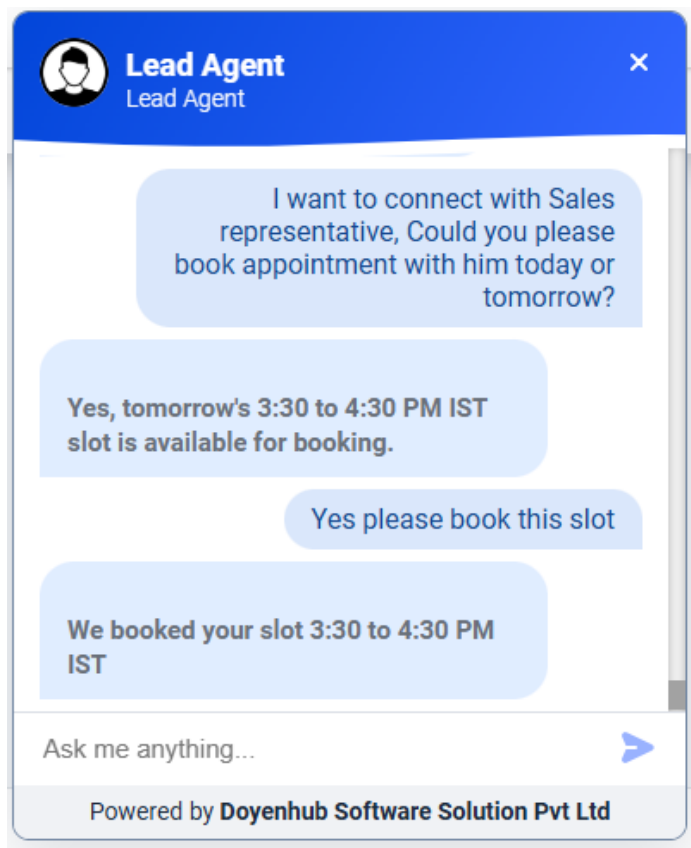
I want to connect with Sales representative, Could you please book appointment with him today or tomorrow?

Yes, tomorrow's 3:30 to 4:30 PM IST slot is available for booking.

Yes please book this slot

Ask me anything... >

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Lead has been created in CRM for that customer with date and time:

