AI Sales Assistant

Lead Intelligence Guide

Smart insights to close more deals

Powered by Rule-based AI

100%	0	24/7
Free to Use	API Costs	Available

Version 1.0 | December 2024

Support: support@gautamjain2026.com

1. Introduction

The AI Sales Assistant is your intelligent companion for managing leads and closing deals. It provides real-time insights, recommendations, and sales tips without requiring any external API or additional costs.

🎯 Lead Scoring

Automatic 0-100 score based on lead quality and engagement

📊 Conversion Prediction

Probability of closing based on lead status and data

💡 Smart Recommendations

Personalized next steps for each lead

⏰ Best Time to Call

Optimal calling windows for higher answer rates

⚠️ Risk Alerts

Early warnings for leads going cold

📚 Sales Knowledge

Follow-up tips, objection handling, closing techniques

2. Accessing the AI Assistant

Step 1: Locate the AI Button

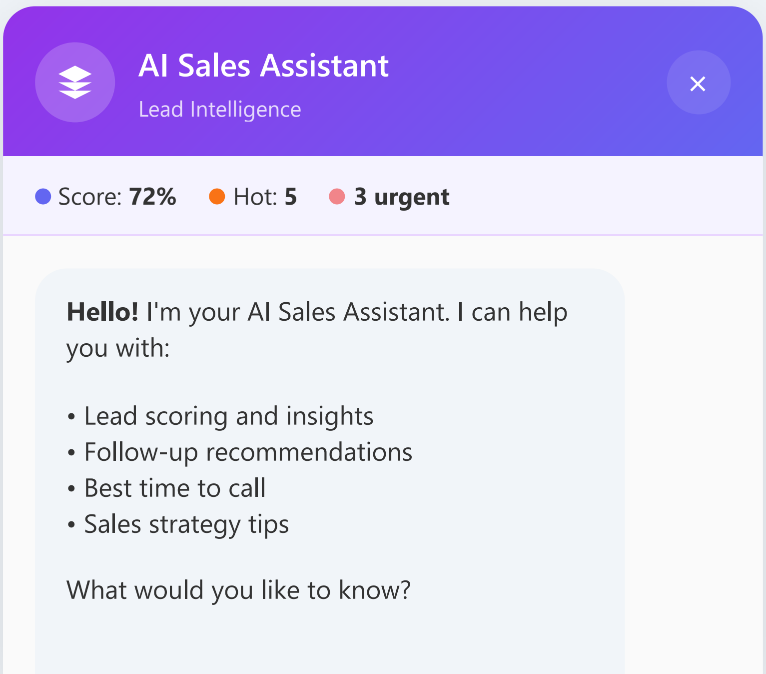
After logging in, look for the purple sparkle button at the bottom-right corner of your screen. This button is visible on every page of the CRM.

SCREENSHOT: AI ASSISTANT BUTTON LOCATION

Step 2: Open the Chat Window

Click the button to open the AI Assistant chat window. You'll see a welcome message with quick action suggestions.

SCREENSHOT: AI ASSISTANT WELCOME SCREEN



Analyze my leads

Show hot leads

Follow-up tips

Conversion strategies

Ask about leads, sales tips...

V

3. Key Features

3.1 Insights Bar

At the top of the chat window, you'll see a real-time insights bar showing:

Metric	Description
Score	Average lead score across your pipeline
Hot	Number of high-scoring leads (70+)
Urgent	Leads requiring immediate attention (pulsing indicator)

3.2 Quick Suggestions

Click any suggestion button to instantly get relevant information:

- **Analyze my leads** - Get an overview of your lead pipeline
- **Show hot leads** - View your top-scoring leads
- **Follow-up tips** - Best practices for follow-ups
- **Conversion strategies** - Tips to improve close rates

3.3 Lead Analysis

Ask "Analyze my leads" or select a specific lead to get detailed insights:

SCREENSHOT: LEAD ANALYSIS VIEW

85

John Smith

🔥 Hot Lead

CONVERSION PROBABILITY

URGENCY

78%

HIGH

BEST ACTION

Send proposal

BEST TIME

10-11 AM

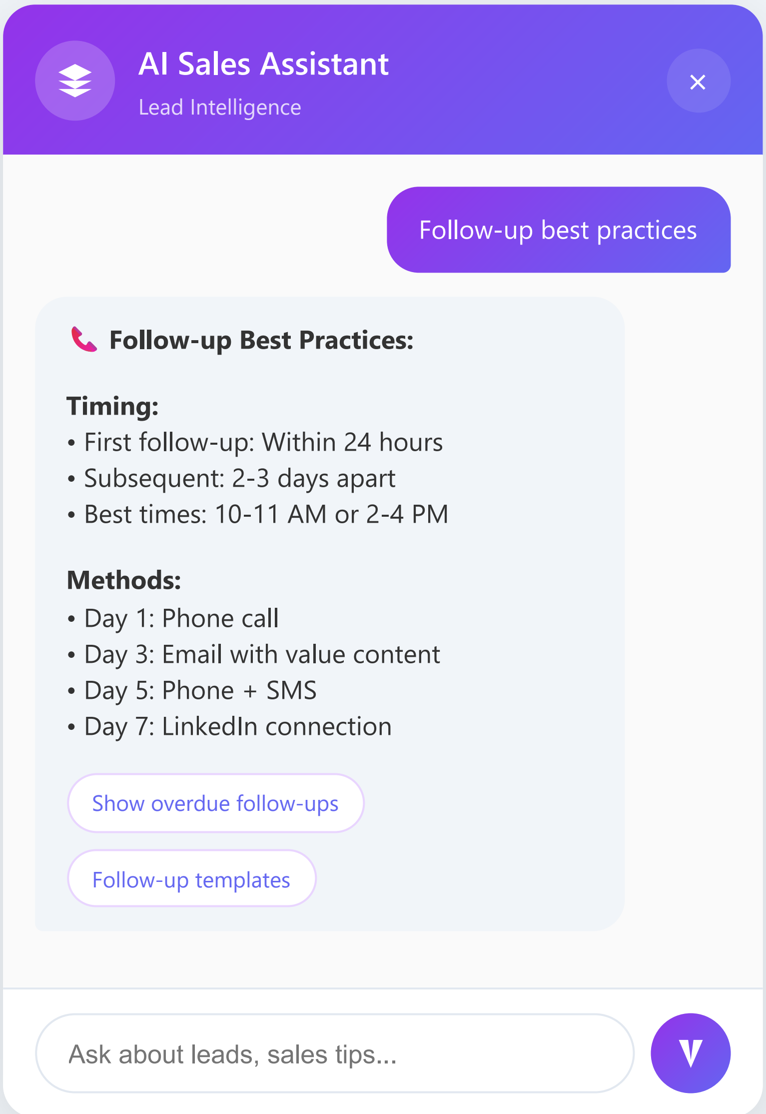
Recommendations:

1. Prepare customized proposal based on requirements
2. Identify decision makers and stakeholders
3. Share relevant case studies

4. Sample Conversations

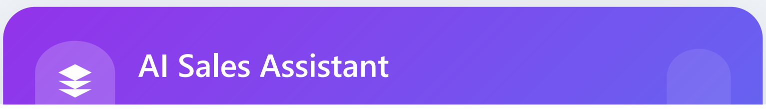
4.1 Getting Follow-up Advice

SCREENSHOT: FOLLOW-UP CONVERSATION



4.2 Handling Objections

SCREENSHOT: OBJECTION HANDLING TIPS



Lead Intelligence

How to handle price objections?

🎯 **"It's too expensive" Response:**

→ Focus on ROI, not just cost
→ Break down cost per day/use
→ Compare to cost of NOT solving the problem
→ Offer payment plans if available

Example:
"I understand budget is important. Let's look at the return - this typically saves 10 hours/week. At your team's hourly rate, that's $X saved monthly..."

More objections

Closing techniques

Ask about leads, sales tips...

5. Understanding Lead Scores

The AI Assistant calculates lead scores based on multiple factors:

5.1 Scoring Factors

Factor	Weight	Description
Email Provided	10 pts	Has valid email address
Phone Provided	15 pts	Has phone number for direct contact
Company Info	10 pts	Company name identified
Budget Defined	20 pts	Has budget information (scales with amount)
Recent Activity	15 pts	Updated within last 7 days
Source Quality	15 pts	Lead source (referral = highest)

5.2 Score Labels

🔥 Hot Lead (80-100)

High probability of conversion. Prioritize these leads!

🌞 Warm Lead (60-79)

Good potential. Needs nurturing and follow-up.

🌱 Nurturing (40-59)

Building relationship. Focus on providing value.

❄️ Cold Lead (0-39)

Needs qualification. Gather more information.

6. Tips for Best Results

💡 **Pro Tips**

- **Keep lead data updated** - The AI provides better insights with complete information
- **Check urgent leads daily** - The pulsing indicator shows leads needing immediate attention
- **Use quick suggestions** - They're designed for common questions
- **Ask specific questions** - "How to handle price objections?" works better than "help"
- **Review recommendations** - Each lead analysis includes actionable next steps

Questions You Can Ask

Category	Example Questions
Lead Analysis	"Analyze my leads", "Show hot leads", "Who needs attention?"
Follow-ups	"Follow-up tips", "Best practices for follow-ups"
Conversion	"How to improve conversion?", "Conversion strategies"
Objections	"Objection handling tips", "How to handle price objections?"
Closing	"Closing techniques", "How to close deals?"

7. Support

Need Help?

Contact our support team:

support@gautamjain2026.com

Quick Links

Application	https://client-chi-jade-53.vercel.app
GitHub	github.com/verifiedjobs2/lumvescrm
Support Email	support@gautamjain2026.com