CINC AI

PLANNING

Planning: Gather Requirements

The main business goal is to sell the AI feature to our existing clients.

- Move AI out of beta
- Promote this feature to all existing agents
- Package AI functionality into a widget where agents can view lead conversations and then decide what action to take next

Note* Beta for AI first started in the lead activity feed

Planning: User Interviews

Main questions to answer:

- How do agents know they need to take action?
- How can agents mute/unmute the AI on a lead?
- How do agents understand the AI status per lead?

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USER INTERVIEWS

Research: User Inteviews

Sample questions

- Walk us through your process when assessing AI conversations with leads?
- How do you determine what action to take based on your assessment?
- Where would you expect to mute/unmute the AI on a lead level?
- What details will help you determine the status of an AI conversation with leads?

Research: Feedback Patterns

1

Activity Tab & Filters

- Quickly find and digest recent AI convos
- Clearer distinction between agent and AI conversations
- Organize the activity filters into groups
- Offer ability to filter by:
  - Most recent
  - AI only

2

Summarize Key Findings

- Help users see the results from ongoing AI conversations
- Quickly identify current lead activity
- Option to update lead details with changes in lead status or search criteria
  - Searches (Price, Location, BR/BA)
  - Timeframe
  - Wrong number
  - Working agent or lender
  - House to sell

3

Settings & Notifications

- Easily turn AI on/off on site level
- Easily mute/unmute AI on lead level
- Alerts triggered by conversation status:
  - Conversation has started
  - Conversation has stopped
  - Conversation topic (lender, city, etc.)
- Notification settings (email, text, etc.)

More key takeaways

Challenges

- AI misleading agents about lead status
- Difficulty getting oriented around where the conversation is
- Identifying what actions to take next
- Wants notifications for leads that require immediate attention
- AI doesn't always stop when you tell it to
- Difficult to take over conversation
- Offer meaningful notifications about the lead status versus message overload

Better Scripts

- AI connects well with new leads, but comes off as aggressive or inattentive
- Need a re-engagement script
- Rogue conversations (Ex. AI does not alert agent of an appointment made)
- Easier way to surface specific data points

Key Info on Lead Details

- Activity
- Notes
- Last Touch
- Results of last touch
- Property views
- Favorites
- Inquiries

"I'm having to apologize for the things the system (AI) is doing."

Potential Solutions

- Address information overload on lead activity tab
- Offer filtering options on activity tab
- Consider centralization of key details for lead status
- Surface quick access options for AI settings and alerts

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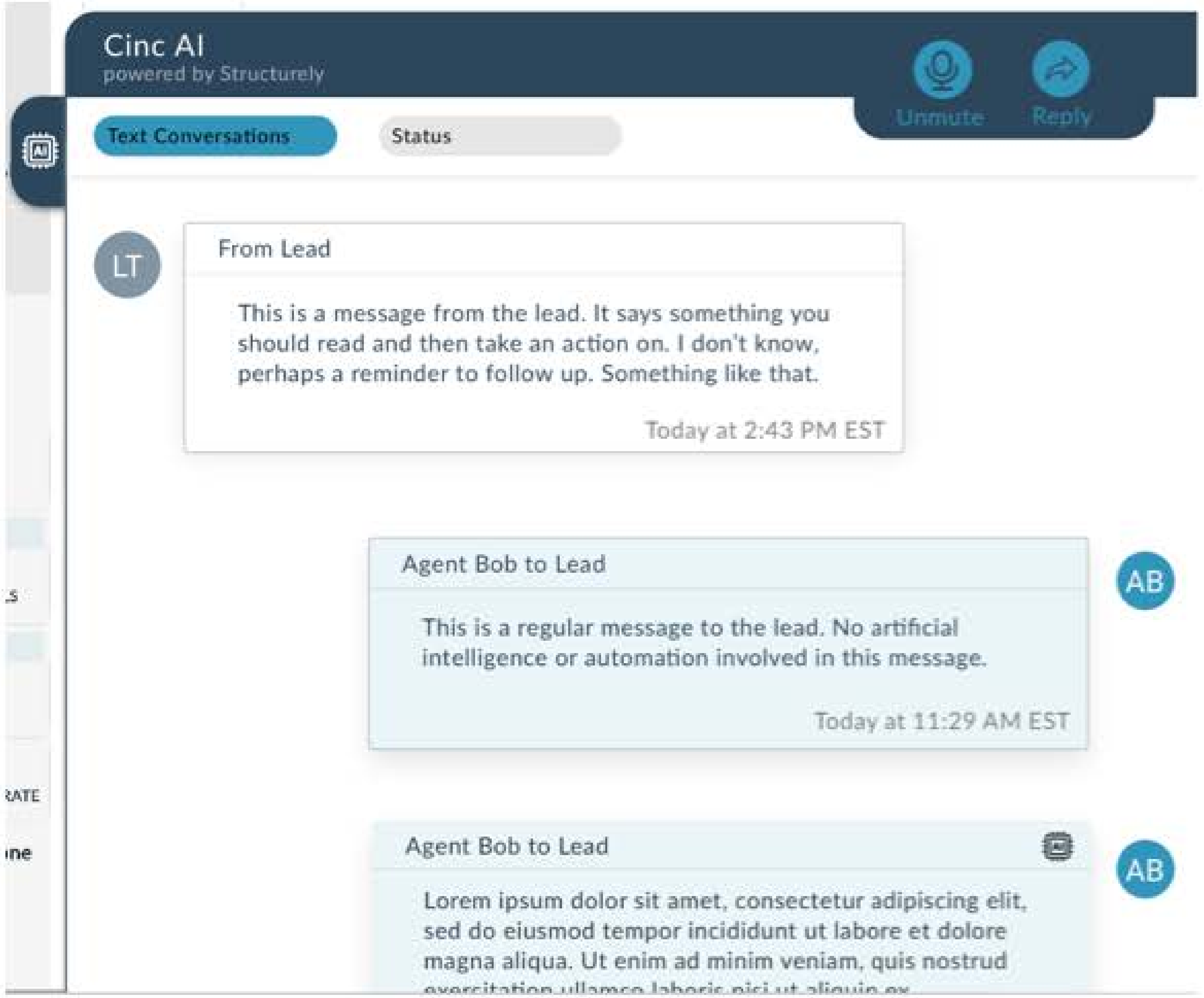
ITERATIVE DESIGN PROCESS

Design Iteration 1

Main Focus: Centralize lead conversations


Cinc AI
powered by Structurely
Unmute
Reply
Text Conversations
Status
LT
AB
AB

From Lead

This is a message from the lead. It says something you should read and then take an action on. I don't know, perhaps a reminder to follow up. Something like that.

Today at 2:43 PM EST

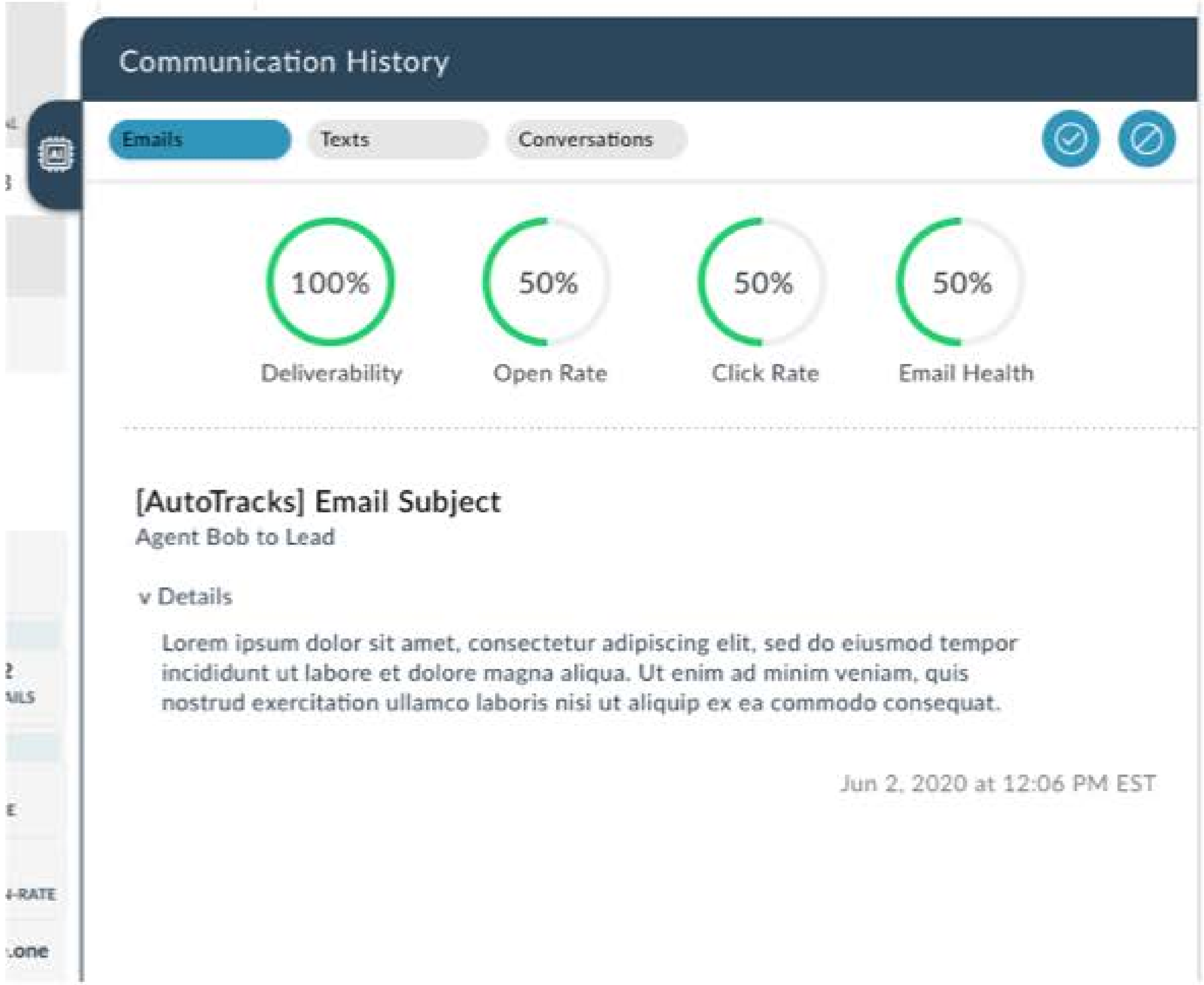
Agent Bob to Lead

This is a regular message to the lead. No artificial intelligence or automation involved in this message.

Today at 11:29 AM EST

Agent Bob to Lead

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud


Communication History
Emails
Texts
Conversations
100%
Deliverability
50%
Open Rate
50%
Click Rate
50%
Email Health

[AutoTracks] Email Subject

Agent Bob to Lead

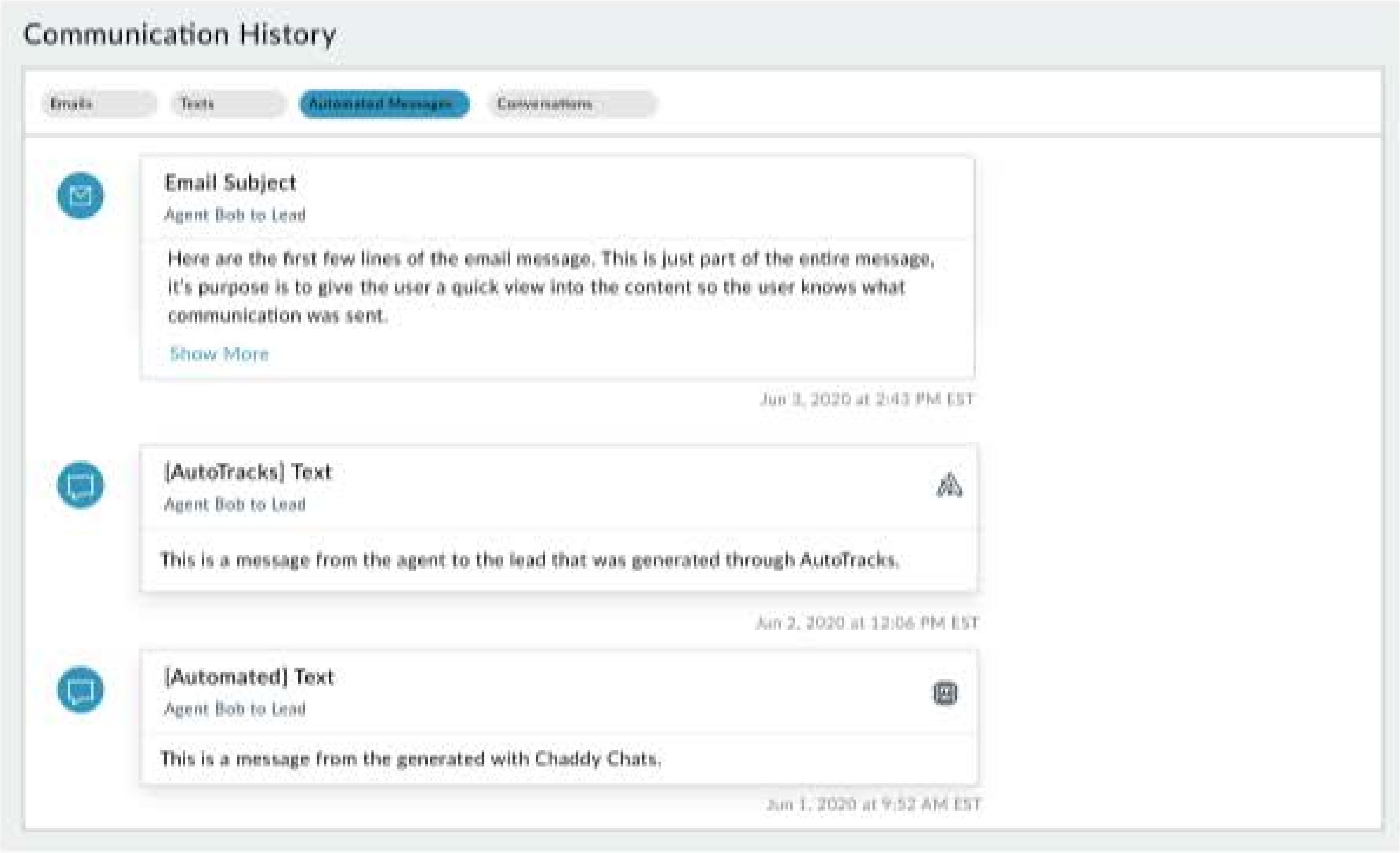
v Details

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Jun 2, 2020 at 12:06 PM EST

Design Iteration 2

Main Focus: Communication history



Communication History

Email Subject
Agent Bob to Lead

Here are the first few lines of the email message. This is just part of the entire message, it's purpose is to give the user a quick view into the content so the user knows what communication was sent.

Jun 3, 2020 at 2:43 PM EST

[AutoTracks] Text
Agent Bob to Lead

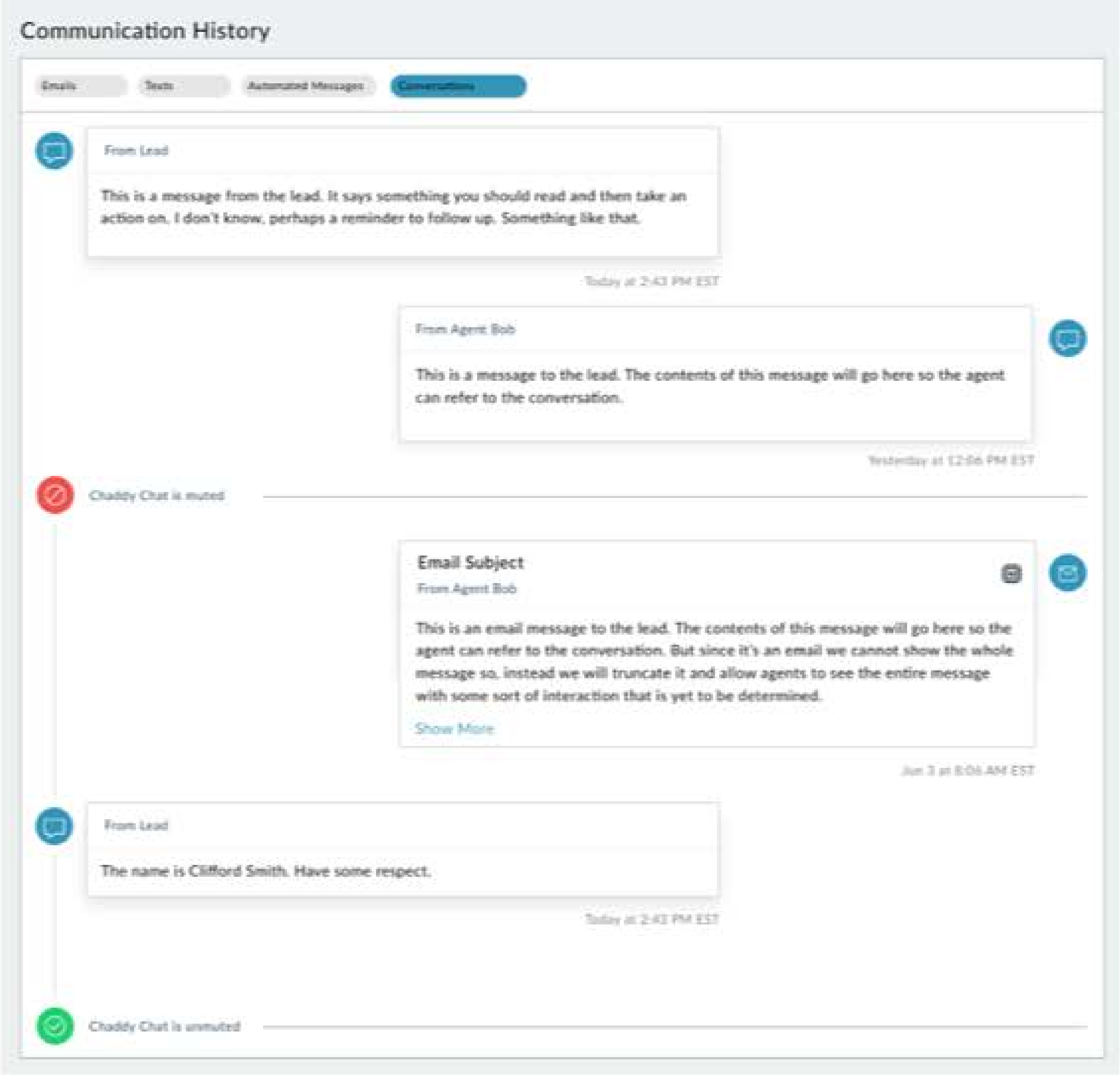
This is a message from the agent to the lead that was generated through AutoTracks.

Jun 2, 2020 at 12:06 PM EST

[Automated] Text
Agent Bob to Lead

This is a message from the generated with Chaddy Chats.

Jun 1, 2020 at 9:52 AM EST



Communication History

From Lead

This is a message from the lead. It says something you should read and then take an action on. I don't know, perhaps a reminder to follow up. Something like that.

Today at 2:43 PM EST

From Agent Bob

This is a message to the lead. The contents of this message will go here so the agent can refer to the conversation.

Yesterday at 12:06 PM EST

Chaddy Chat is muted

Email Subject
From Agent Bob

This is an email message to the lead. The contents of this message will go here so the agent can refer to the conversation. But since it's an email we cannot show the whole message so, instead we will truncate it and allow agents to see the entire message with some sort of interaction that is yet to be determined.

Jun 3 at 8:06 AM EST

From Lead

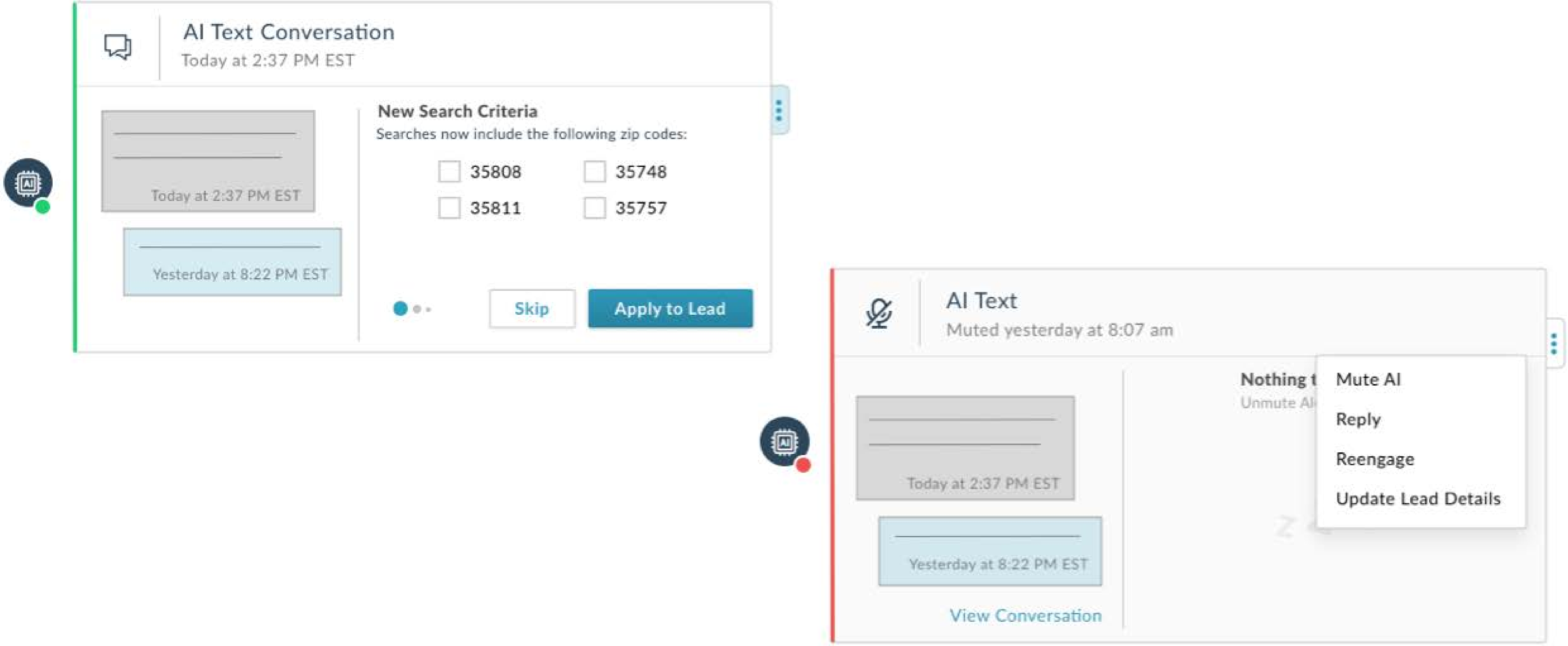
The name is Clifford Smith. Have some respect.

Today at 2:43 PM EST

Chaddy Chat is unmuted

Design Iteration 3

Main Focus: AI conversation status and action items



AI Text Conversation
Today at 2:37 PM EST

Today at 2:37 PM EST

Yesterday at 8:22 PM EST

New Search Criteria
Searches now include the following zip codes:

☐ 35808 ☐ 35748
☐ 35811 ☐ 35757

AI Text
Muted yesterday at 8:07 am

Nothing t
Unmute AI

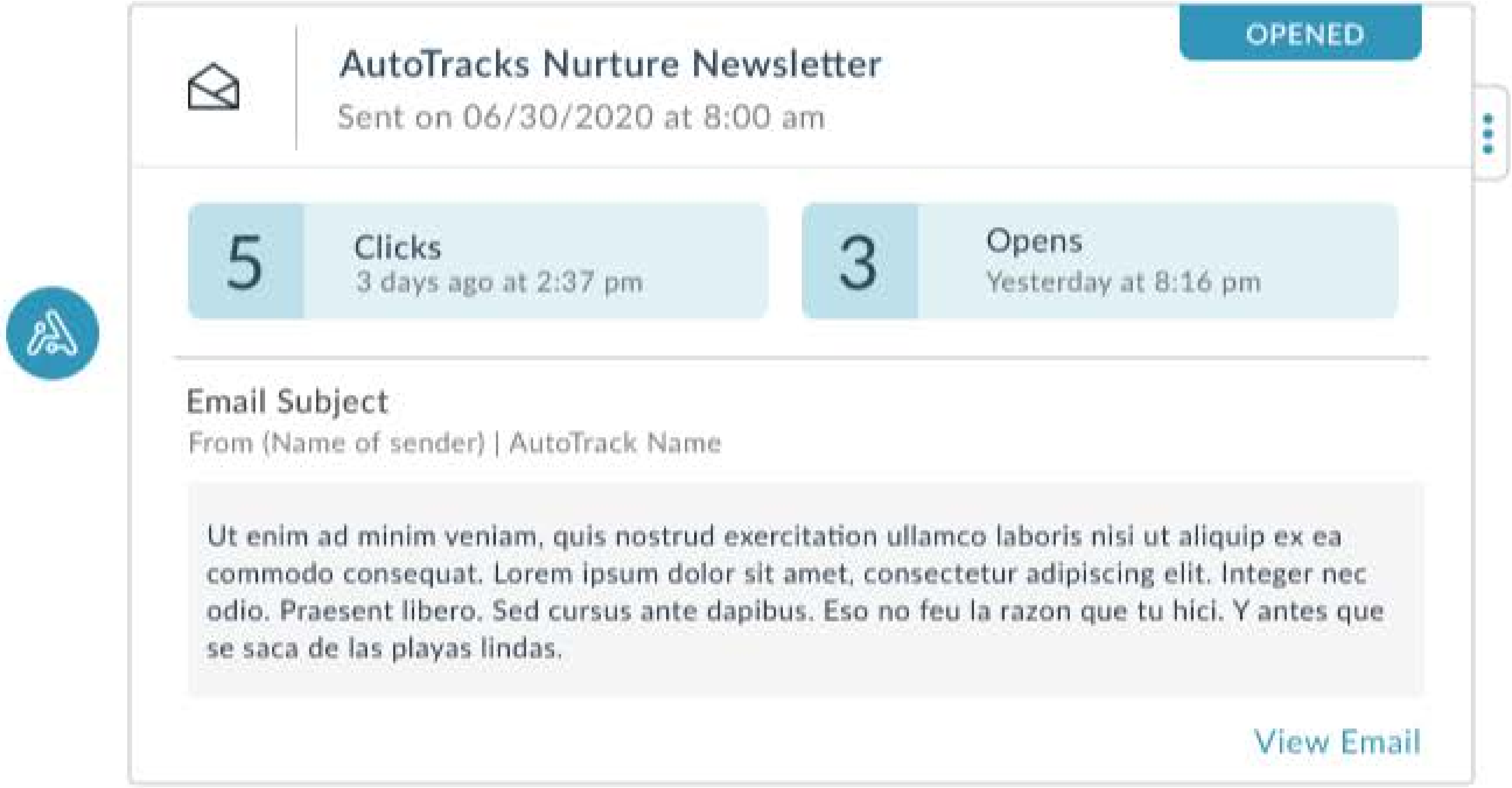
Today at 2:37 PM EST

Yesterday at 8:22 PM EST

Skip
Apply to Lead
Mute AI
Reply
Reengage
Update Lead Details
View Conversation

Design Iteration 4

Main Focus: Activity feed



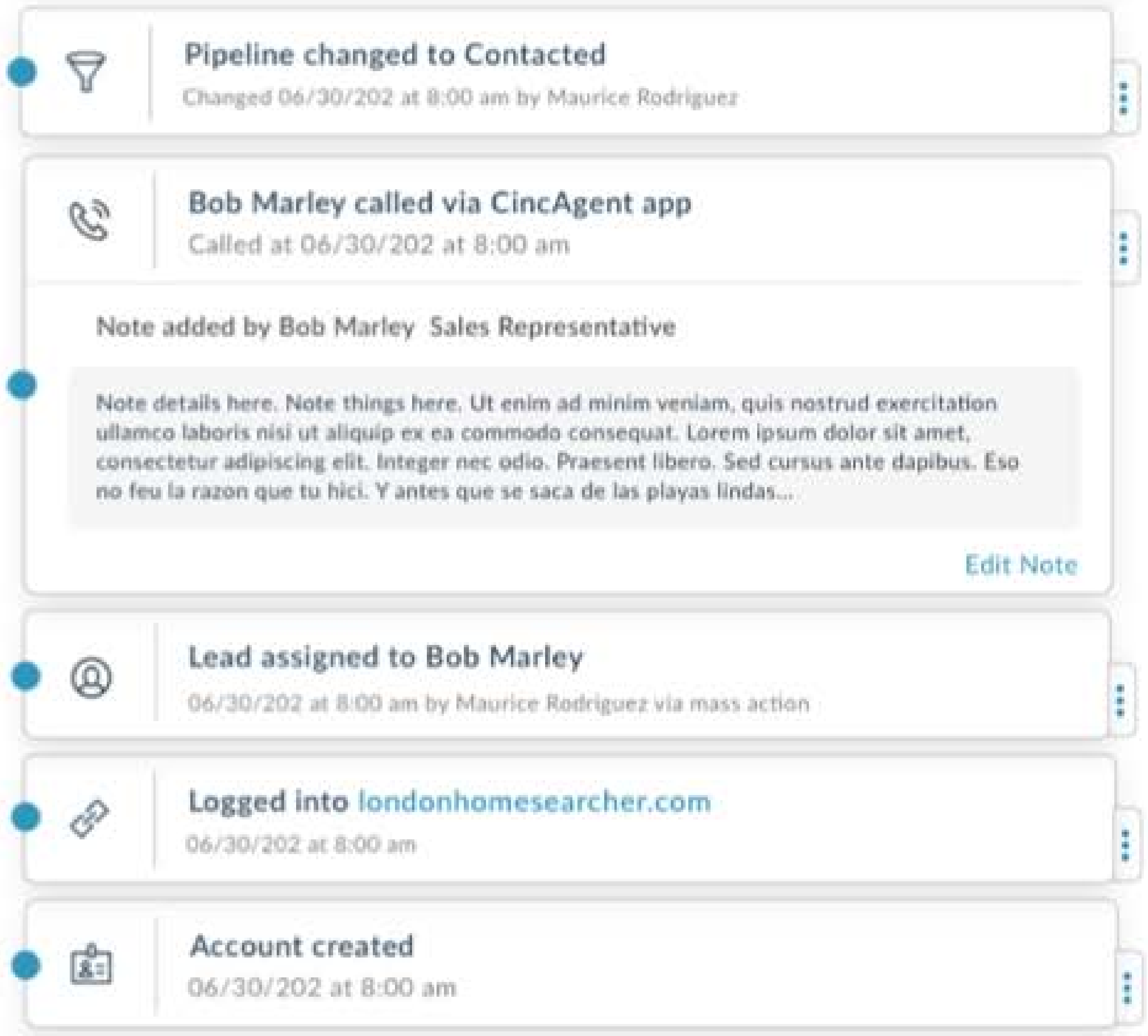
AutoTracks Nurture Newsletter
Sent on 06/30/2020 at 8:00 am

5 Clicks
3 days ago at 2:37 pm

3 Opens
Yesterday at 8:16 pm

Email Subject
From (Name of sender) | AutoTrack Name

Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio. Praesent libero. Sed cursus ante dapibus. Eso no feu la razon que tu hici. Y antes que se saca de las playas lindas.



Pipeline changed to Contacted
Changed 06/30/202 at 8:00 am by Maurice Rodriguez

Bob Marley called via CincAgent app
Called at 06/30/202 at 8:00 am

Note added by Bob Marley Sales Representative

Note details here. Note things here. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio. Praesent libero. Sed cursus ante dapibus. Eso no feu la razon que tu hici. Y antes que se saca de las playas lindas...

Lead assigned to Bob Marley
06/30/202 at 8:00 am by Maurice Rodriguez via mass action

Logged into londonhomesearcher.com
06/30/202 at 8:00 am

Account created
06/30/202 at 8:00 am

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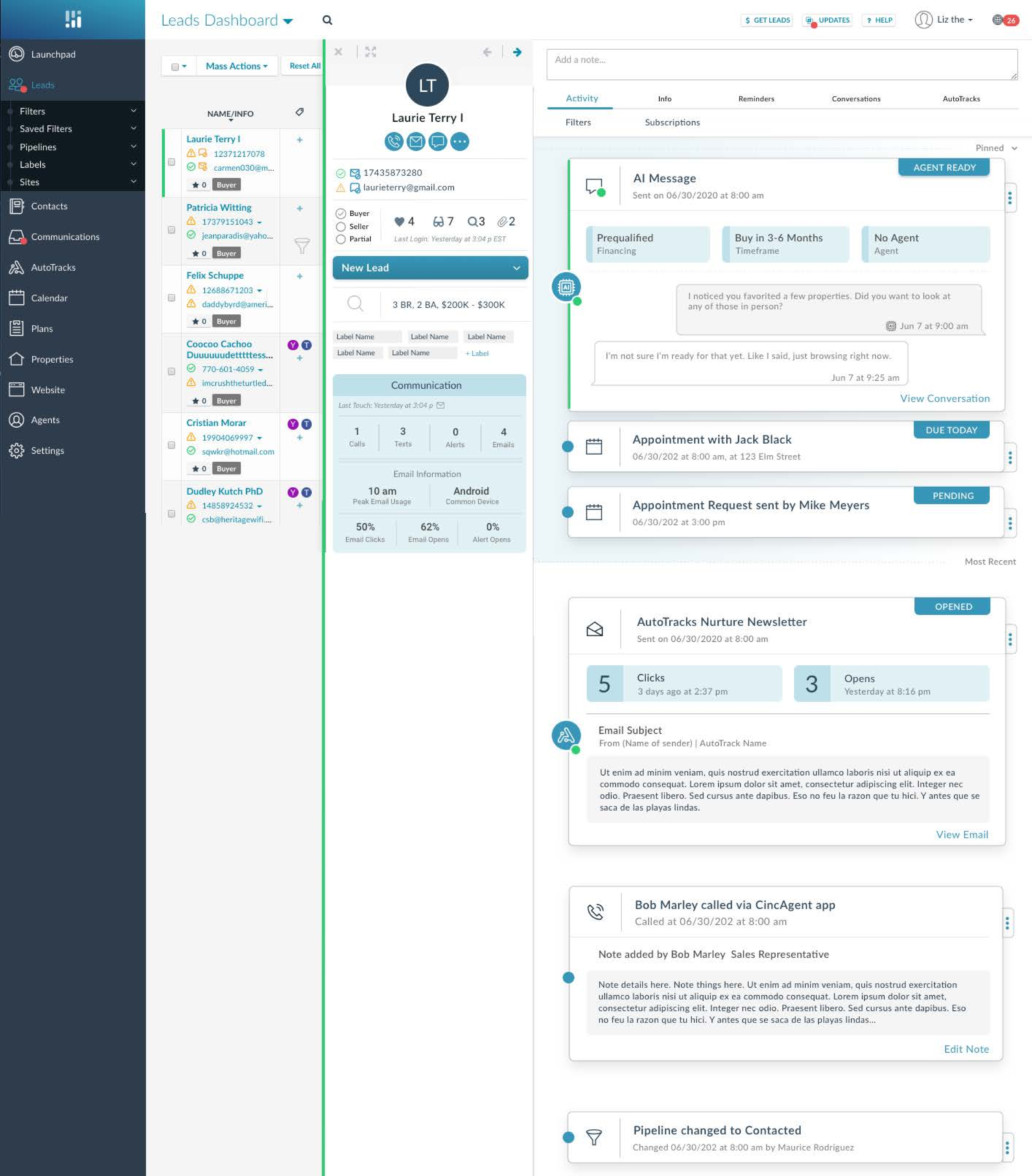
FINAL DESIGN CONCEPT


Leads Dashboard
$ GET LEADS
UPDATES
? HELP
Liz the
26
Launchpad
Leads
Filters
Saved Filters
Pipelines
Labels
Sites
Contacts
Communications
AutoTracks
Calendar
Plans
Properties
Website
Agents
Settings
Mass Actions
Reset All
NAME/INFO
Activity
Info
Reminders
Conversations
AutoTracks
Filters
Subscriptions
Pinned
Most Recent

Laurie Terry I
12371217078
carmen030@m...
0 Buyer

Patricia Witting
17379151043
jeanparadis@yaho...
0 Buyer

Felix Schuppe
12688671203
daddybyrd@ameri...
0 Buyer

Coocoo Cachoo Duuuuuudetttttess...
770-601-4059
imcrushtheturtled...
0 Buyer

Cristian Morar
19904069997
sqwkr@hotmail.com
0 Buyer

Dudley Kutch PhD
14858924532
csb@heritagewifi....

LT

Laurie Terry I

17435873280
laurieterry@gmail.com

○ Buyer
○ Seller
○ Partial

4 7 3 2

Last Login: Yesterday at 3:04 p EST

New Lead

3 BR, 2 BA, $200K - $300K

Label Name
Label Name
Label Name
Label Name
Label Name
+ Label

Communication

Last Touch: Yesterday at 3:04 p

1	3	0	4
Calls	Texts	Alerts	Emails

Email Information

10 am
Peak Email Usage

Android
Common Device

50%	62%	0%
Email Clicks	Email Opens	Alert Opens

Add a note...

AGENT READY

AI Message
Sent on 06/30/2020 at 8:00 am

Prequalified
Financing

Buy in 3-6 Months
Timeframe

No Agent
Agent

I noticed you favorited a few properties. Did you want to look at any of those in person?
Jun 7 at 9:00 am

I'm not sure I'm ready for that yet. Like I said, just browsing right now.
Jun 7 at 9:25 am

View Conversation

DUE TODAY

Appointment with Jack Black
06/30/202 at 8:00 am, at 123 Elm Street

PENDING

Appointment Request sent by Mike Meyers
06/30/202 at 3:00 pm

OPENED

AutoTracks Nurture Newsletter
Sent on 06/30/2020 at 8:00 am

5 Clicks
3 days ago at 2:37 pm

3 Opens
Yesterday at 8:16 pm

Email Subject
From (Name of sender) | AutoTrack Name

Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio. Praesent libero. Sed cursus ante dapibus. Eso no feu la razon que tu hici. Y antes que se saca de las playas lindas.

View Email

Bob Marley called via CincAgent app
Called at 06/30/202 at 8:00 am

Note added by Bob Marley Sales Representative

Note details here. Note things here. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio. Praesent libero. Sed cursus ante dapibus. Eso no feu la razon que tu hici. Y antes que se saca de las playas lindas...

Edit Note

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Changed 06/30/202 at 8:00 am by Maurice Rodriguez