

iConvo: AI Customer Engagement Platform



Any call center planning needs to start with this question: Is there a customer engagement strategy in place?

1) Improved customer experience is a primary goal & outcome of any customer engagement strategy. The strategy ensures that individuals enjoy faster, more personalized interactions and greater accessibility to services.

2) Operational cost reduction is also high on the list of objectives of any customer engagement strategy. The strategy aims to significantly reduce Operational costs through automation of routine tasks, allowing staff to focus on critical support activities. The strategy seek to enhance the decision-making process through data-driven insights that enable organizations to anticipate needs, allocate resources efficiently, and maintain compliance with regulatory standards.

Collectively, these benefits contribute to a more sustainable, customer-centric real estate ecosystem that leverages technology (like AI) to deliver superior care. That is Why Conversational AI matters in real estate, because it is the key to your customer engagement strategy. So, if I am to build a customer engagement strategy, this is what I would do:

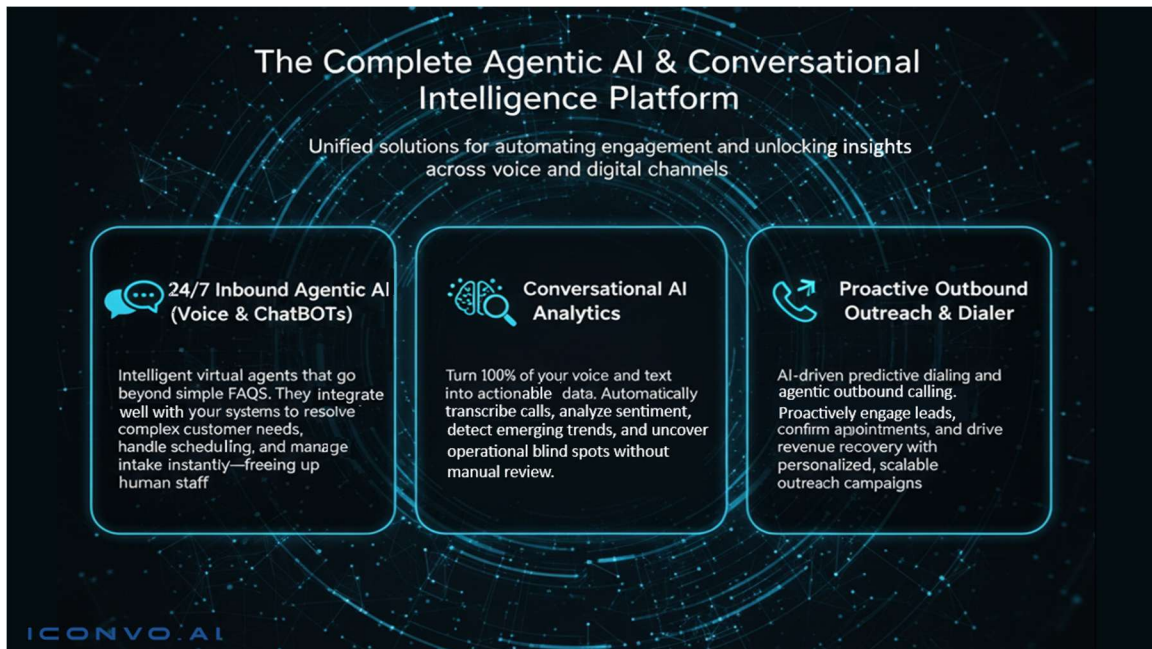
1) The foundation of any customer engagement strategy is unified technology backbone (**unified echo system**): Before achieving any goals, we need to make sure of the data quality and secure the collection process, starting with unifying all communication touch

points into a single source of truth or data lack. We'll finish connecting all communication channels—phone calls, chats, social media, and eventually in-site visits—into a single, unified view in Odoo/SOHO CRM.

2) Automate and Augment with AI:

- a) Use **Inbound AI Engagement**, such as chat & voice bots to address critical challenges such as accessibility, efficiency, and personalization. Conversational AI mitigates these issues by providing instant responses, automating routine tasks, intelligent routing and offering 24/7 support. It enables call centers to handle high volumes of inquiries without compromising quality, ensuring that customers receive accurate information promptly.
- b) On the sales side, instead of agents manually guessing if a lead is good, **Proactive Outbound AI Engagement** will automatically analyze all incoming leads from campaigns and conversations to identify the "hottest" ones. This will ensure agents are always working on the leads most likely to convert and will enhance the "Lead-to-Site Visit" Ratio. Also Proactive Outbound engagement can fully automate the after-visit customer engagement with intelligent follow-up appointment reminders which reduces the No-show rate. AI will also help agents by automatically filling out forms and providing real-time suggestions during calls, making their job easier and faster. Furthermore, AI-driven systems can personalize interactions based on customer history and preferences, fostering trust and improving adherence to business goals.
- c) Lack of insights leads to operational blindness. Now you need to Measure real customer satisfaction (CSAT) and apply quality assurance (QA) mechanism to boost agent performance. Use **Conversational AI Analytics** to understand what customers are feeling in every conversation, instead of relying on unreliable surveys. This gives us a true, real-time pulse on customer satisfaction, allowing us to fix issues before they become bigger problems. Also, eliminate quality control gaps and training black holes, stop guessing about agent performance. AI will listen to every call and read every chat to objectively measure agent behavior, coaching them on how to improve. **The Value:** "Business would be able to say, 'Temperature sentiment dropped 20% regarding billing questions this week,' or 'Agent Sarah is excellent at de-escalating upset customers, while Mark needs training on insurance explanation.' We turn noise into insights to improve training and the patient experience."

So, to summarize, any call center needs to have a customer engagement strategy in place. Starting with unifying all communication touch points and the data collection into a single source of truth, then automate and augment with AI, and that includes inbound & outbound AI Engagement and finally measure it with Conversational Analytics & QA.



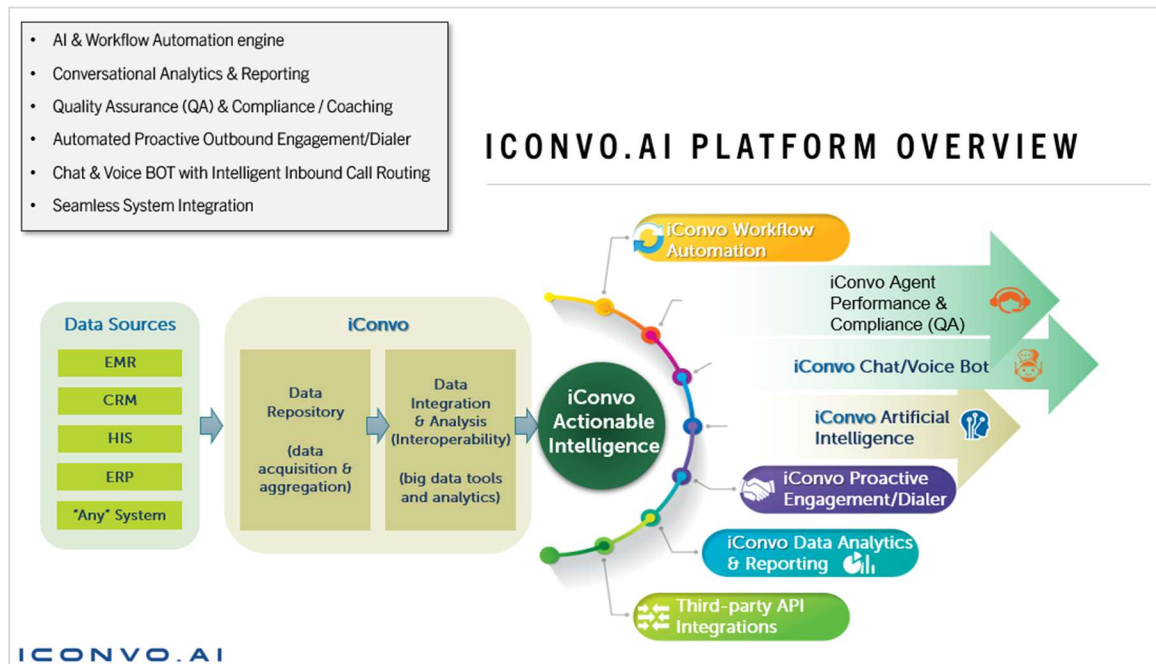
At its core, iConvo addresses three critical pillars of modern engagement: inbound AI-driven engagement & support, conversational analytics & QA, and proactive outbound engagement & outreach. iConvo is a comprehensive platform designed to revolutionize customer engagement through advanced agentic AI and conversational intelligence. It offers a unified solution that automates interactions across voice and digital channels while delivering actionable insights from every conversation.

1) **24/7 Inbound Agentic AI (Voice & Chatbots)**: Intelligent virtual agents that go beyond simple FAQs. They integrate with your systems to resolve complex customer needs, handle scheduling, and manage intake instantly—freeing up human staff.

2) **Conversational AI Analytics & QA**: Turn 100% of your voice and text interactions into actionable data (what the call is about, why the customer is calling, the type of language or messages used in the call, how the customer was handled, and the eventual outcome of the call. Insights about the customer, their views, the customer journey, experience, satisfaction & sentiment, the root causes of satisfaction or dissatisfaction, beside insights about the agent and the call itself. Wealth of information mined from conversations and turned into actions (hence the word “actionable”) that can change the flow and nature of a conversation - improving KPIs, like the first call resolution (FCR), better customer satisfaction (CSAT & NPS) & retention or, improved sales revenue). Automatically transcribe calls, analyze sentiment, detect emerging trends, and uncover operational blind spots without manual review.

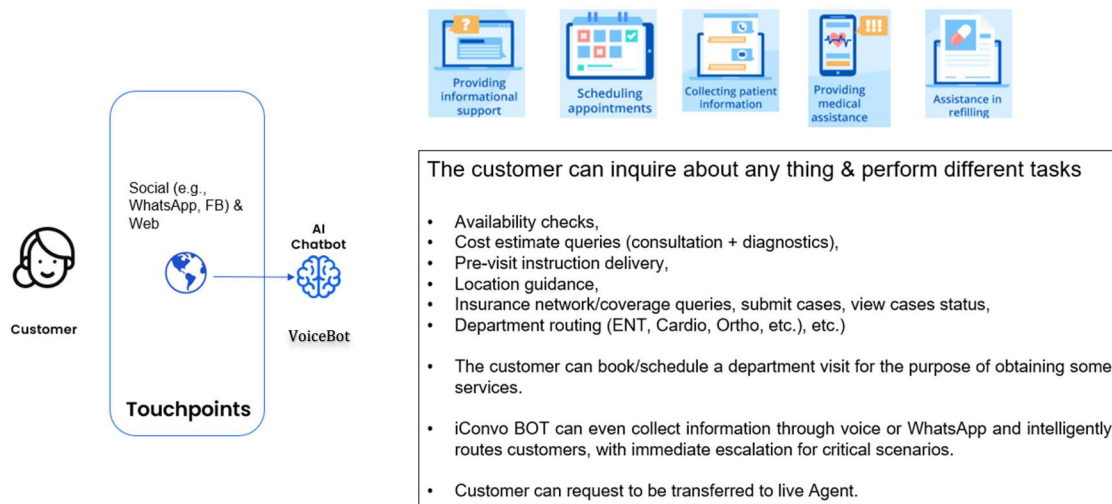
3) **Proactive Outbound Outreach & Dialer**: AI-driven predictive dialing and agentic outbound calling. Proactively engage leads, confirm appointments, and drive revenue recovery with personalized, scalable outreach campaigns.

These capabilities enable businesses to execute its customer engagement strategy delivering the promised benefits: streamline operations, reduce costs, drive growth and enhance customer satisfaction. Its holistic approach ensures that routine tasks are automated, insights are revealed effortlessly, and human expertise is reserved for nuanced, high-value interactions. This combination of automation and intelligence positions iConvo as a transformative solution for businesses seeking scalability, efficiency, and superior customer engagement.



The above diagram is a good representation of iConvo platform. On the left-hand side iConvo integrates with the customer's backbone unifying data from various data sources aggregating it into a single source of truth which is iConvo's big data/data lake. This is how we build a unified view of the customer. From this unified data we extract actionable intelligence, that is fed to all iConvo's solution deliverables: AI Automation, inbound & outbound AI proactive Engagement, and Conversational Analytics & QA.

1) Inbound AI Customer Engagement & Call Handling



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We can deploy an Agentic Voice AI that handles the 'repetitive 80%' of calls instantly, without hold times. Unlike an old 'press 1 for scheduling' menu, our AI can understand natural language inquiries like 'I need to move my Tuesday appointment to Thursday'.

The "Agentic" Value: Your company's digital front door should never be locked. iConvo provides a 24/7 intelligent concierge on phone and webchat. If a new customer visits your website at 11 PM, our AI can answer FAQs about insurance acceptance, capture their intake information, and even tentatively hold an appointment slot for the next morning. You stop losing customers to competitors simply because they were open digitally when you weren't.

iConvo AI BOT can fully handle Customer appointment and inquiry automation (voice & digital/e.g. WhatsApp). Crucially, it doesn't just talk; it acts. It integrates with your scheduling/Backend system to actually move that appointment slot in real-time. This frees up your front desk to handle complex, empathetic customer interactions face-to-face. Here follows some of the related **use cases** that iConvo can deliver:

- ✦ Availability checks
- ✦ Department routing (ENT, Cardio, Ortho, etc.)
- ✦ Appointment scheduling & rescheduling
- ✦ Cost estimate queries (consultation + diagnostics)
- ✦ Pre-visit instruction delivery
- ✦ Location guidance
- ✦ Insurance network/coverage queries

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- ✚ iConvo BOT can even collect information through voice or WhatsApp and intelligently routes customers, with immediate escalation for critical scenarios.

Expected Impact

- ✚ 30–50% reduction in inbound call volume
- ✚ Faster response times (<10 sec)
- ✚ Higher booking conversion rates
- ✚ Reduced staff workload
- ✚ Reduced misrouting

2) Outbound AI Customer Engagement & auto-dialer

Transforming your sales funnel from high-volume activity to high-intent conversion.

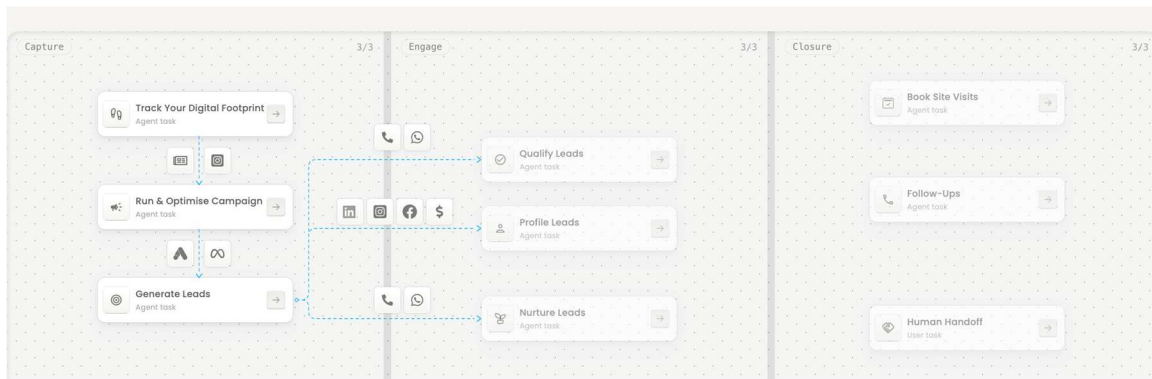
Core Value Proposition

iConvo sells outcomes, not services. We manage the entire lifecycle from lead capture to closing, ensuring your team only spends time on prospects who are informed, qualified, and ready to buy.

The iConvo Methodology: Capture → Engage → Closure

Our autonomous AI workforce handles the heavy lifting, allowing your human team to focus solely on high-value handoffs.

Stage	Agent Tasks	Channels
Capture	Track Digital Footprint, Run & Optimise Campaigns, Generate Leads	Meta, Google, LinkedIn, WhatsApp
Engage	Qualify Leads, Profile & Score Leads, Nurture Leads	Phone, WhatsApp, Email
Closure	Book Site Visits/Test Drives, Follow-ups, Human Handoff	Calendar Integration, CRM



How it works

01 Enquiry comes in From ads, website, WhatsApp, walk-in database, referrals — any source.

02 AI responds instantly Under 2 minutes. In the customer's language. 24/7, even weekends.

03 Prospect qualified Budget, intent, timeline, preferences — confirmed before your team spends a minute.

04 Lead profiled & scored Ranked by purchase readiness. High-intent prospects surface first.

05 Appointment booked Auto-scheduled with confirmations and reminders. No-shows drop dramatically.

06 AI nurtures Offers, updates, urgency nudges — persistent and personalised until decision.

07 Your team closes Prospect arrives informed, qualified, and ready. Your team does the handshake.

Why Partner with iConvo?

- **Instant Response:** AI engages prospects within 2 minutes, 24/7.
- **Qualification First:** Budget, intent, and timeline are confirmed before a human ever engages.
- **Performance Driven:** Measured on booked appointments and successful handoffs, not just activity.
- **Seamless Integration:** Works across your existing databases, ads, websites, and walk-in leads.
- **Proven Intelligence:** Trained on 1M+ conversations in 150+ languages.

Key Business Impacts

- 10-15% lift in overall sales conversion.
- ~20% shorter time from enquiry to close.
- 40% less sales overhead across operations.

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