Vymo

Vymo AI CoPilot

Vymo is the first ground up AI-enabled distribution management platform built with sellers in mind. Increase revenue, eliminate expenses, and reduce risk by changing the way you and your team engage with clients using AI that puts the power of data at your fingertips.

Vymo AI CoPilot

Vymo CoPilot is enabled throughout the app allowing your team simple access training, guided selling, and support questions without having to search for the data they need. Vymo leverages a rules engine, machine learning and deep learning algorithms to analyze your data in correlation with activity data gathered from Vymo to provide actionable insights supporting your decision-making processes.

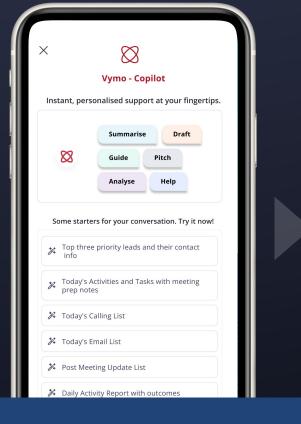## Integration into Daily Workflow

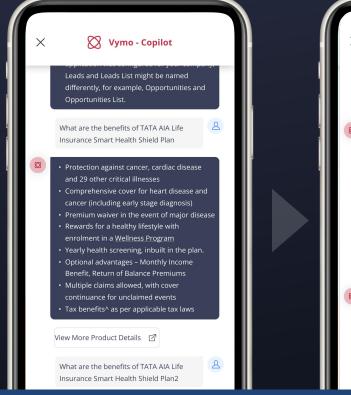Vymo AI CoPilot helps with all tasks for smooth transition into their new role
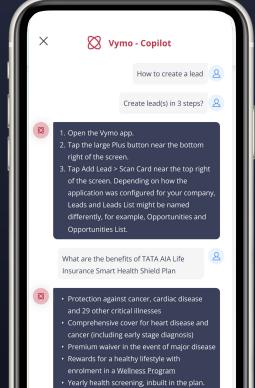
Interactive Product Learning

Detailed product insights that are delivered instantly to start selling from day one

How-To-Use Trainings

Onboarding with detailed step-by-step guides

Vymo - Copilot

Instant, personalised support at your fingertips.

Summarise   Draft

Guide   Pitch

Analyse   Help

Some starters for your conversation. Try it now!

- Top three priority leads and their contact info
- Today's Activities and Tasks with meeting prep notes
- Today's Calling List
- Today's Email List
- Post Meeting Update List
- Daily Activity Report with outcomes

Vymo - Copilot

application was configured for your company, Leads and Leads List might be named differently, for example, Opportunities and Opportunities List.

What are the benefits of TATA AIA Life Insurance Smart Health Shield Plan

- Protection against cancer, cardiac disease and 29 other critical illnesses
- Comprehensive cover for heart disease and cancer (including early stage diagnosis)
- Premium waiver in the event of major disease
- Rewards for a healthy lifestyle with enrolment in a Wellness Program
- Yearly health screening, inbuilt in the plan.
- Optional advantages – Monthly Income Benefit, Return of Balance Premiums
- Multiple claims allowed, with cover continuance for unclaimed events
- Tax benefits^ as per applicable tax laws

View More Product Details

What are the benefits of TATA AIA Life Insurance Smart Health Shield Plan2

Vymo - Copilot

How to create a lead

Create lead(s) in 3 steps?

1. Open the Vymo app.
2. Tap the large Plus button near the bottom right of the screen.
3. Tap Add Lead > Scan Card near the top right of the screen. Depending on how the application was configured for your company, Leads and Leads List might be named differently, for example, Opportunities and Opportunities List.

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Vymo

Vymo AccelerateIQ

We take delivering value seriously at Vymo and are committed to helping you take full advantage of the platform. With AccelerateIQ, the Vymo team will help guide you on your AI journey through platform enablement and consultative engagements with our experienced team.

Vymo Maturity to Value

VALUE

Activity Captured against KPIs

Early adopters seeing great business value and generating measurable results against goals.

Action Influenced Outcomes

AI Generated nudges driving behavior. Managers able to focus on areas of need. Increases in team performance: lead conversion, net new premium & renewals, "ready to sell" time reducing. Onboarding streamlined.

Performance Enhancement

Analytics & ML driving fine-tuning of playbooks to replicate best in class processes and performance. Performance issues easily identified and addressed. Continued improvements in lead conversion, net new premium, up-sell, and cross-sell.

AI Generated Recommendations

Value of AI starts to drive behavior and results based on a substantial data set of results and actions from ML generated activity nudges & suggestions.

Continued improvements in lead conversion, net new premium, renewals, up-sell, and cross-sell.

Reductions in recruitment & "ready to sell" times, customer churn, and producer attrition.

3 Months   6 Months   9 Months   12 Months

Vymo

Vymo OnboardIQ

Leverage Vymo AI to focus on the candidates most likely to succeed in your organization. Vymo will provide you with candidate scoring, AI-enabled contact suggestions, and a training cadence based on your training goals.
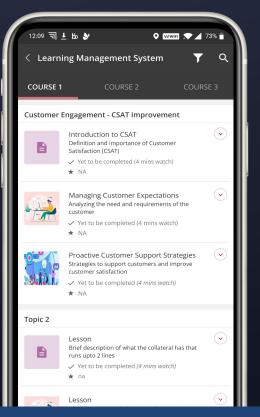
Nudges

Playbook rendered prompts for timely agent updates and learning interventions
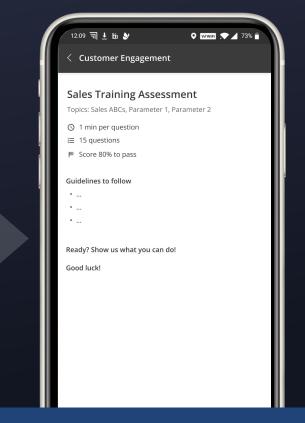
AI-Curated Courses

Auto-create micro courses for highly engaging onboarding and product launch content

Assessments & Quizzes

Auto generated assessments to enhance performance and gauge the knowledge of sellers

Phone 1

10:10
Thursday, 25 March

VYMO   now

You have been assigned the course "Customer engagement - CSAT Improvement" to complete. Click here to view details.

Phone 2

< Learning Management System

COURSE 1 | COURSE 2 | COURSE 3

Customer Engagement - CSAT Improvement

Introduction to CSAT
Definition and importance of Customer Satisfaction (CSAT)
✓ Yet to be completed (4 mins watch)
★ NA

Managing Customer Expectations
Analyzing the need and requirements of the customer
✓ Yet to be completed (4 mins watch)
★ NA

Proactive Customer Support Strategies
Strategies to support customers and improve customer satisfaction
✓ Yet to be completed (4 mins watch)
★ NA

Topic 2

Lesson
Brief description of what the collateral has that runs upto 2 lines
✓ Yet to be completed (4 mins watch)
★ na

Lesson

Phone 3

< Customer Engagement

Sales Training Assessment
Topics: Sales ABCs, Parameter 1, Parameter 2

🕐 1 min per question
☰ 15 questions
🏴 Score 80% to pass

Guidelines to follow
• ...
• ...
• ...

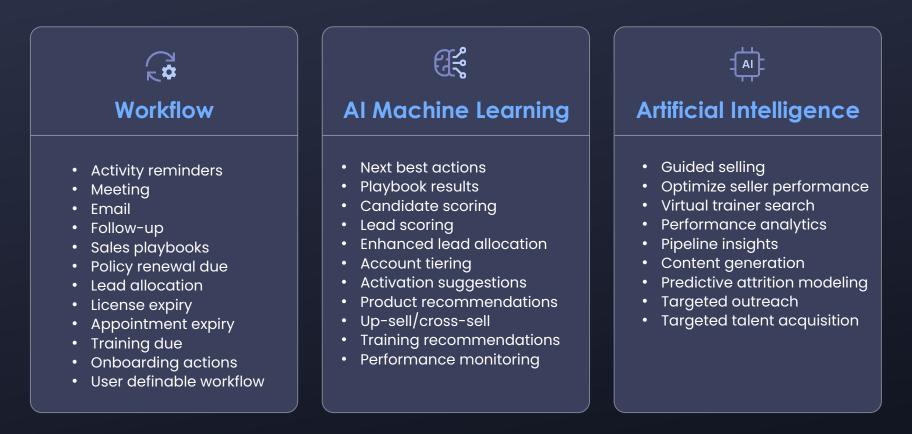Ready? Show us what you can do!

Good luck!

Vymo EngageIQ

By leveraging sales activities captured through the Vymo Platform, Vymo AI is able to leverage its advanced AI algorithms to deliver insights and actions directly to your leadership and field team.

Vymo Powered by AI

Workflow

- Activity reminders
- Meeting
- Email
- Follow-up
- Sales playbooks
- Policy renewal due
- Lead allocation
- License expiry
- Appointment expiry
- Training due
- Onboarding actions
- User definable workflow

AI Machine Learning

- Next best actions
- Playbook results
- Candidate scoring
- Lead scoring
- Enhanced lead allocation
- Account tiering
- Activation suggestions
- Product recommendations
- Up-sell/cross-sell
- Training recommendations
- Performance monitoring

Artificial Intelligence

- Guided selling
- Optimize seller performance
- Virtual trainer search
- Performance analytics
- Pipeline insights
- Content generation
- Predictive attrition modeling
- Targeted outreach
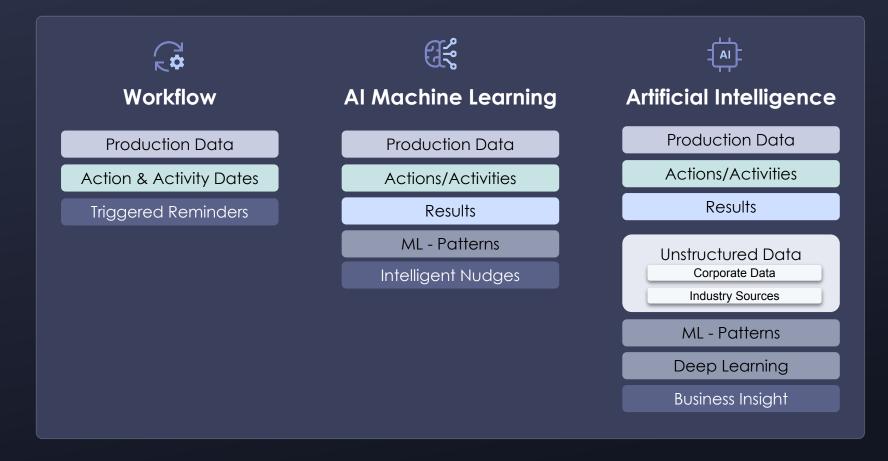- Targeted talent acquisition

Vymo DistributionHUB

The heart of Vymo AI. The Vymo Distribution**Hub** contains your data and Vymo activity data to feed an AI engine that delivers results to your users and helps you meet your growth goals.
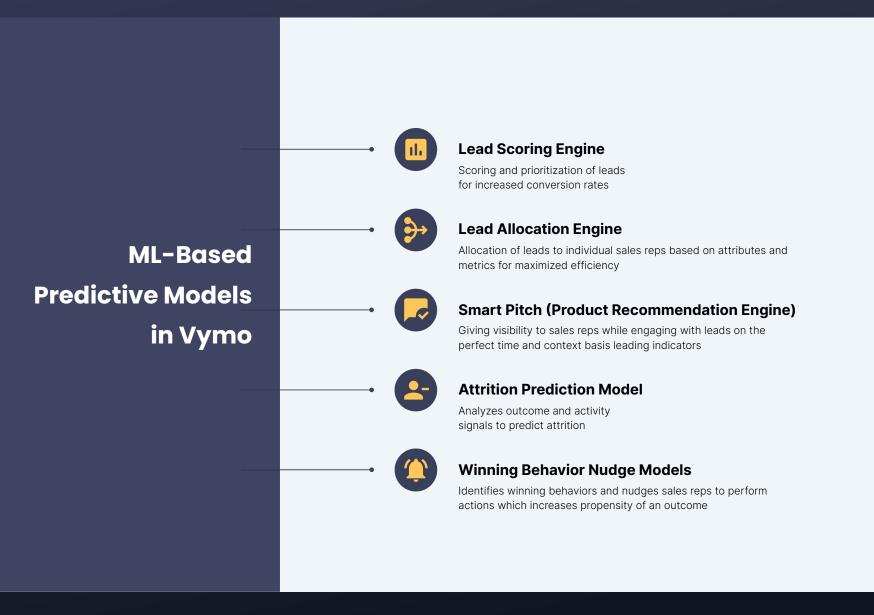
Vymo powered by AI

Workflow

Production Data

Action & Activity Dates

Triggered Reminders

AI Machine Learning

Production Data

Actions/Activities

Results

ML - Patterns

Intelligent Nudges

Artificial Intelligence

Production Data

Actions/Activities

Results

Unstructured Data
Corporate Data
Industry Sources

ML - Patterns

Deep Learning

Business Insight

Tech Talk

Vymo leverages both internally developed AI algorithms and sophisticated open-source platforms to create an AI ecosystem that delivers results.
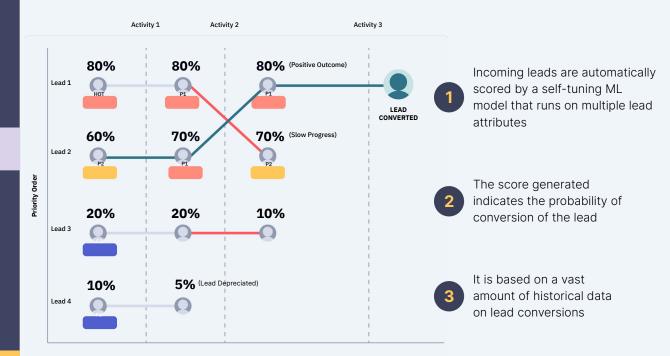
ML-Based Predictive Models in Vymo

Lead Scoring Engine
Scoring and prioritization of leads for increased conversion rates

Lead Allocation Engine
Allocation of leads to individual sales reps based on attributes and metrics for maximized efficiency

Smart Pitch (Product Recommendation Engine)
Giving visibility to sales reps while engaging with leads on the perfect time and context basis leading indicators

Attrition Prediction Model
Analyzes outcome and activity signals to predict attrition

Winning Behavior Nudge Models
Identifies winning behaviors and nudges sales reps to perform actions which increases propensity of an outcome

Lead Scoring Engine

Machine learning-based scoring and prioritization of leads for increased conversion rates

Impact Metrics

- 3x improvement in TTFM pre/post-lead scoring rollout
- Lead Closure TAT
- 4x improvement for hot leads, 1.5x improvement for warm leads, 10x improvement for cold leads
- 4x increase in policy issuance for hot leads

Released

Activity 1 **Activity 2** **Activity 3**

Priority Order

Lead 1 — 80% / 80% / 80% (Positive Outcome) — HOT, P1, P1 — LEAD CONVERTED

Lead 2 — 60% / 70% / 70% (Slow Progress) — P2, P1, P2

Lead 3 — 20% / 20% / 10% — P3

Lead 4 — 10% / 5% (Lead Depreciated) — P3

1. Incoming leads are automatically scored by a self-tuning ML model that runs on multiple lead attributes

2. The score generated indicates the probability of conversion of the lead

3. It is based on a vast amount of historical data on lead conversions

Smart Pitch (Product Recommendation Engine)

Machine learning models analyze leading indicators to empower your sales rep to engage leads at the PERFECT time and IDEAL context

Release Timeline

Deployed based on client interest

Product List
Products sold to type of leads previously

Lead Attributes
Previous lead conversions, leads assigned, leads lost

User Activity Attributes
Attendance, session duration, activities planned vs. completed

Customer Need Analysis
Age, income, location, product requirement

ML Model

Nudges for increased probability of conversion

- ✓ Best time to outreach
- ✓ Products to pitch
- ✓ Best activity type

SAMPLE NUDGES

SUGGESTION
Boost conversion to 39%
Schedule meeting by 01:30 PM today and pitch Fortune Maxima
🔴 Schedule Activity   📞 Call

SUGGESTION
Boost conversion to 89%
Schedule a meeting by 09:00 PM today and pitch Smart Value Income Plan (SVIP)
🔴 Schedule Activity   📞 Call

Attrition Prediction Model

Machine learning models that meticulously analyze both outcomes and a spectrum of activity signals towards the prediction of attrition

Released

The model empowers managers with a profound understanding of potential outcomes and the actionable insights required for strategic intervention

ML-Model Parameters

Partner Metrics
Partner engagements such as visits, calls, etc.

Lead Metrics
Lead conversions, leads assigned, leads lost

User Activity Metrics
Attendance, session duration, planned vs. completed activities

Predict

ML-models to preemptively nudge on attrition risks

Train
Course lists based on skill gaps

Motivate
Assign hot leads to boost morale

Act
Manager intervention & training
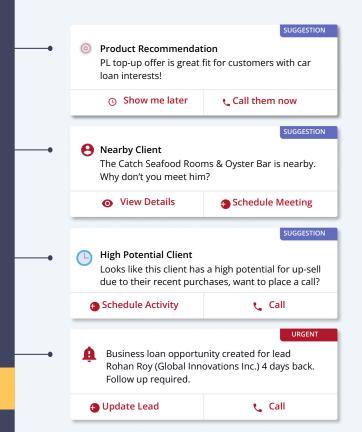
Winning Behavior Nudge Models

Machine learning model that identifies winning behaviors and nudges sales reps to perform actions which increase the propensity of any favorable outcome

Released

SUGGESTION

Product Recommendation
PL top-up offer is great fit for customers with car loan interests!

🕐 Show me later   📞 Call them now

SUGGESTION

Nearby Client
The Catch Seafood Rooms & Oyster Bar is nearby. Why don't you meet him?

👁 View Details   Schedule Meeting

SUGGESTION

High Potential Client
Looks like this client has a high potential for up-sell due to their recent purchases, want to place a call?

Schedule Activity   📞 Call

URGENT

Business loan opportunity created for lead Rohan Roy (Global Innovations Inc.) 4 days back. Follow up required.

Update Lead   📞 Call

Vymo's nudge engine does the following:

1 **Identification of winning behaviors**

2 **Nudging sellers in order to perform the right activities**

3 **Changing behaviors**

Vymo's nudge engine has an acceptance rate of 30%, which means 30% of all suggestions are acted upon

Vymo

Thank You

For more information, please email

hello@getvymo.com

Visit for more info →

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