![conversica]

OEConnection Better Engages, Retains, and Grows Its Base With a Conversica AI Assistant

OEC®

Customer

OEConnection

Challenge

- Scaling Customer Success team
- Low customer engagement

Conversica Solution

Conversica AI Assistant for Customer Success

AI Assistant Persona

Jenna Grant

Conversica Assists

- Unlimited scalability in an affordable manner
- 16K+ dealer customers and 37K active shops
- 23% engagement rate
- Increased retention attributed directly to their AI Assistant
- 5,700 hours saved by using an AI Assistant

OEConnection Better Engages, Retains, and Grows Its Base With a Conversica AI Assistant

OEConnection provides the automotive industry with best-in-class data, software, and service to help drive OEM parts sales.

OEConnection has more than 20 Customer Representatives in North America divided into different territories and functions. Depending on their role, a Customer Representative manages between 500 and 1,000 dealers. Onboarding Reps help new customers get acquainted with the products and services provided over the first three months. After the customer is brought up to speed, they are passed on to an Optimization Rep (effectively an Account Manager) who helps manage customer health and product usage to drive better outcomes.

Originally, Customer Reps relied on emails and phone calls as the primary way to engage with customers. This proved challenging as manual outreach was time-consuming and often left unheeded by customers.

"Our biggest challenge was missing out on large selections of our customer base. They didn't hear from us. They didn't even know they had a Customer Representative," says Carrie Watson, Director of Customer Success at OEConnection. "We couldn't get in front of at-risk customers. Then suddenly, we would get a cancelation."

This was understandably frustrating for the team. Clearly, OEConnection needed another strategy to engage customers. That's when they brought on Conversica AI Assistants for Customer Success.

> **Almost immediately we saw engagement and [opportunities]... Our AI Assistant got dealers to raise their hands and helped increase and improve retention."**
>
> **Carrie Watson**
> *Director of Customer Success at OEConnection*

Conversational Customer Success Skills

UPSELL and CROSS-SELL Customers

DRIVE Customer Health

Big Wins Thanks to Conversational Customer Success

The Customer team at OEConnection knew that their Sales team was using Conversica's Conversational AI since January 2018 and wondered if an AI Assistant could help with scalable outreach and higher engagement.

"We talked about tools to help scale the business," says Watson. "As soon as we heard about Conversica, we were interested in what it could do for our team."

Initially, OEConnection bucketed its customers in three color categories based on usage. Green customers—who were doing well—were offered a quick 15-minute review. Yellow customers were given a survey asking about how confident they were in hitting their goals and whether they were interested in scheduling a call. Red customers—those with the lowest usage—required a team member to reach out to address any issues and suggestions for improvement.

Manual outreach based on this strategy proved to be very time-consuming and resulted in very low engagement, especially from the accounts that arguably needed the most attention. But within just a few months of using Conversational AI for Customer Success, things began to change for the better.

"We have thousands of customers. But what we needed was a way to identify which customers were ready to talk to us," says Watson. "Almost immediately we saw engagement and hot leads. Overall team morale goes up because it allows [Reps] to be more intentional with outbound calls and feel good after talking with customers who actually want to hear from us."

OEConnection uses their Conversica AI Assistant for a variety of purposes including:

- Touching customers who've hit their 4, 8, or 14-month mark in order to schedule a review;
- Connecting with customers who used their application consistently for 6 weeks, then dropped off for 2 weeks to address low usage;
- Reaching out to at-risk customers who are missing on their own sales within the application to address improvements;
- Alerting customers who need reminders to use certain features or regarding upsell opportunities; and
- Communicating with customers at risk of canceling in hopes of addressing concerns and retaining accounts.

"Our team is more productive because they are contacting customers that have already shown engagement through Conversica. We're not dialing 100 numbers to get to the 10 customers who actually want to talk to us," says Watson, "We're able to communicate with thousands of customers at once, saving us on additional headcount or from simply ignoring those customers we can't get to in a day, week, or month."

Time saved by deploying an AI Assistant—named Jenna Grant by the team—allowed OEConnection to manage their customer count without hiring any new employees since they added Conversica to their tech stack. Beyond scale and efficiency, the team collected updated contact information from thousands of customers and saved many customers who were deemed low opportunities. The team explains these things wouldn't have been accomplished otherwise.

 conversica

"Our AI Assistant got dealers to raise their hands and helped increase and improve retention," says Watson. "Our retention scores are pretty high already. But our AI Assistant makes sure that retention is even higher."

OEConnection explains that they are now touching the right customers and driving higher engagement rates. Jenna Grant is sending out personalized emails to thousands of dealerships on behalf of the team. Customer Reps are still making calls, but they are dialing less and having more productive conversations. So less time is spent on trying to connect and more time spent driving customer health. All in all, this new strategy is helping the small team cover 20 thousand to 30 thousand shops.

The Customer team at OEConnection has some advice for other organizations considering Conversational AI for Customer Success.

"It seems pretty obvious after the fact," says Watson. "Cast a wider net, don't hire more people. [Our AI Assistant] puts a screener of sorts, qualifies the lead, allows for more productive call engagements. We definitely have asked for more people in the past but that doesn't give you necessarily more productive calls. With an AI Assistant, you have more productive calls and can spend quality time on your customers."

About Conversica

Conversica is the leading provider of Conversational AI solutions that help enterprise marketing, sales, customer success, and finance teams attract, acquire and grow customers at scale across the customer revenue lifecycle. Conversica AI Assistants serve as digital team members and autonomously engage contacts, prospects, customers, or partners in human-like, two-way interactions at scale to drive towards the next best action, whether that's scheduling a sales meeting, gauging interest to buy additional products or services, or politely but persistently collecting overdue payments.

Processing over a billion interactions, the Conversica Conversational AI platform integrates natural language processing (NLU & NLG), decision & policy management, business process automation and deep learning capabilities to drive customer engagement across multiple digital communication channels and languages. The Conversica platform supports over 50 integrations into the most popular MAP and CRM platforms and offers an open API for custom integration.

To learn more, visit conversica.com and follow the company on Twitter, LinkedIn and Facebook.

conversica

Automotive | OEConnection