



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 by 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

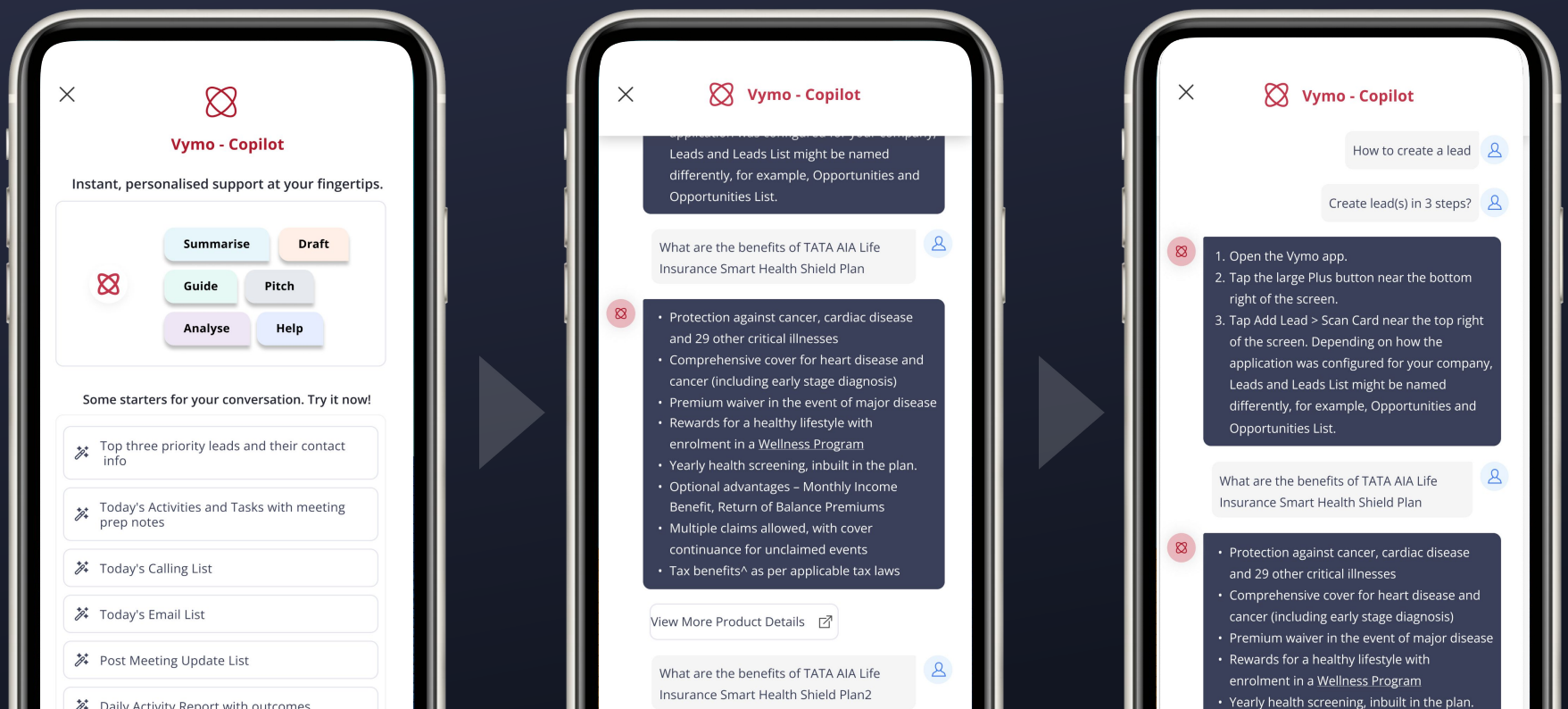
Vymo AI CoPilot helps with all tasks for smooth transition into their new role

Interactive Product Learning

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

How-To-Use Trainings

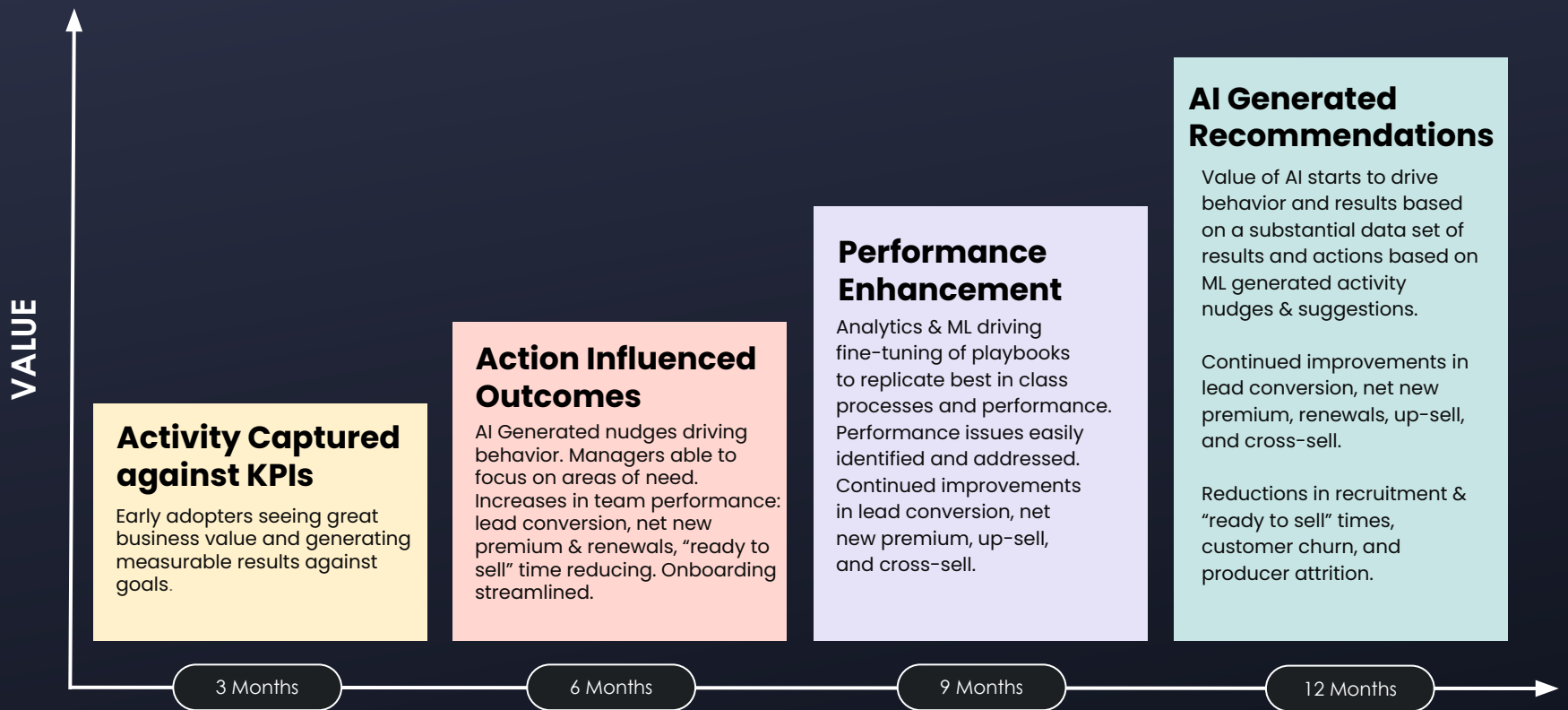
Onboarding with detailed step-by-step guides



Vymo 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

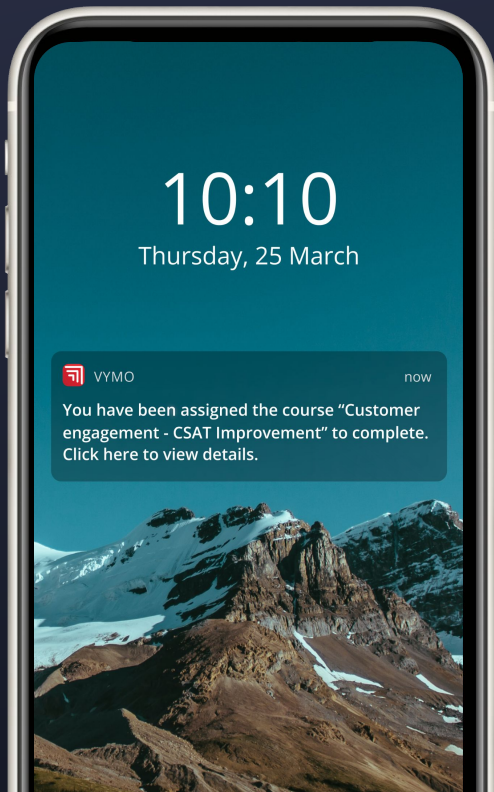


Vymo OnboardIQ

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.

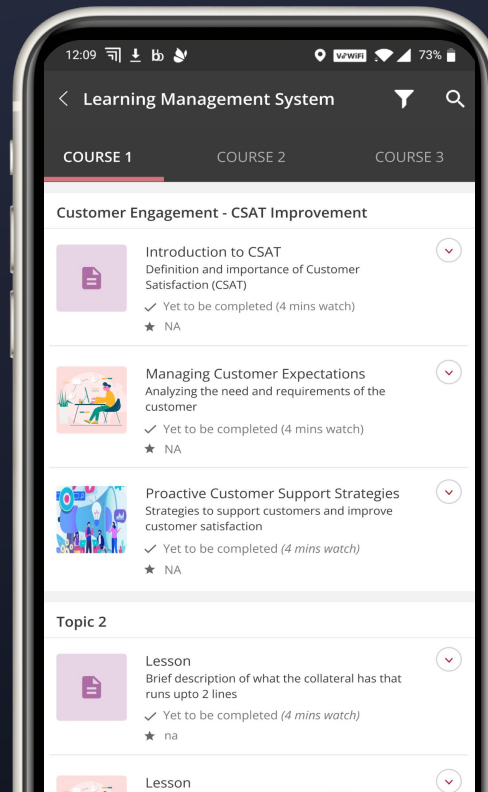
Nudges

Playbook rendered prompts for timely agent updates and learning interventions



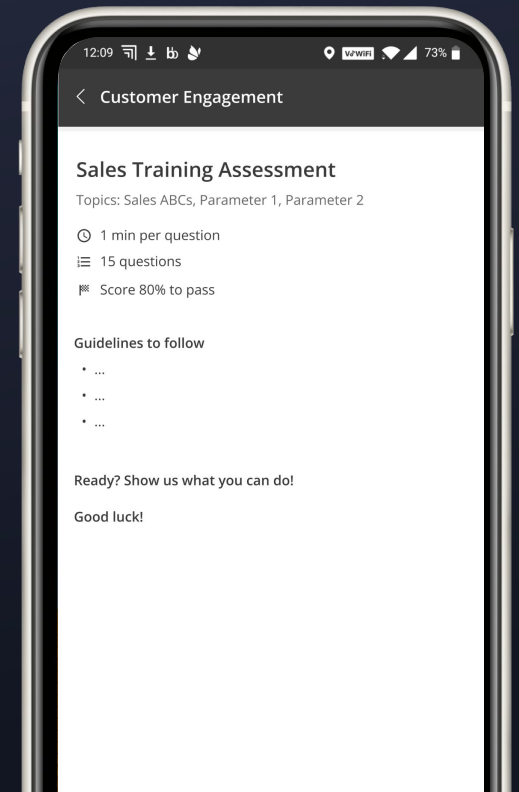
AI-Curated Courses

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



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



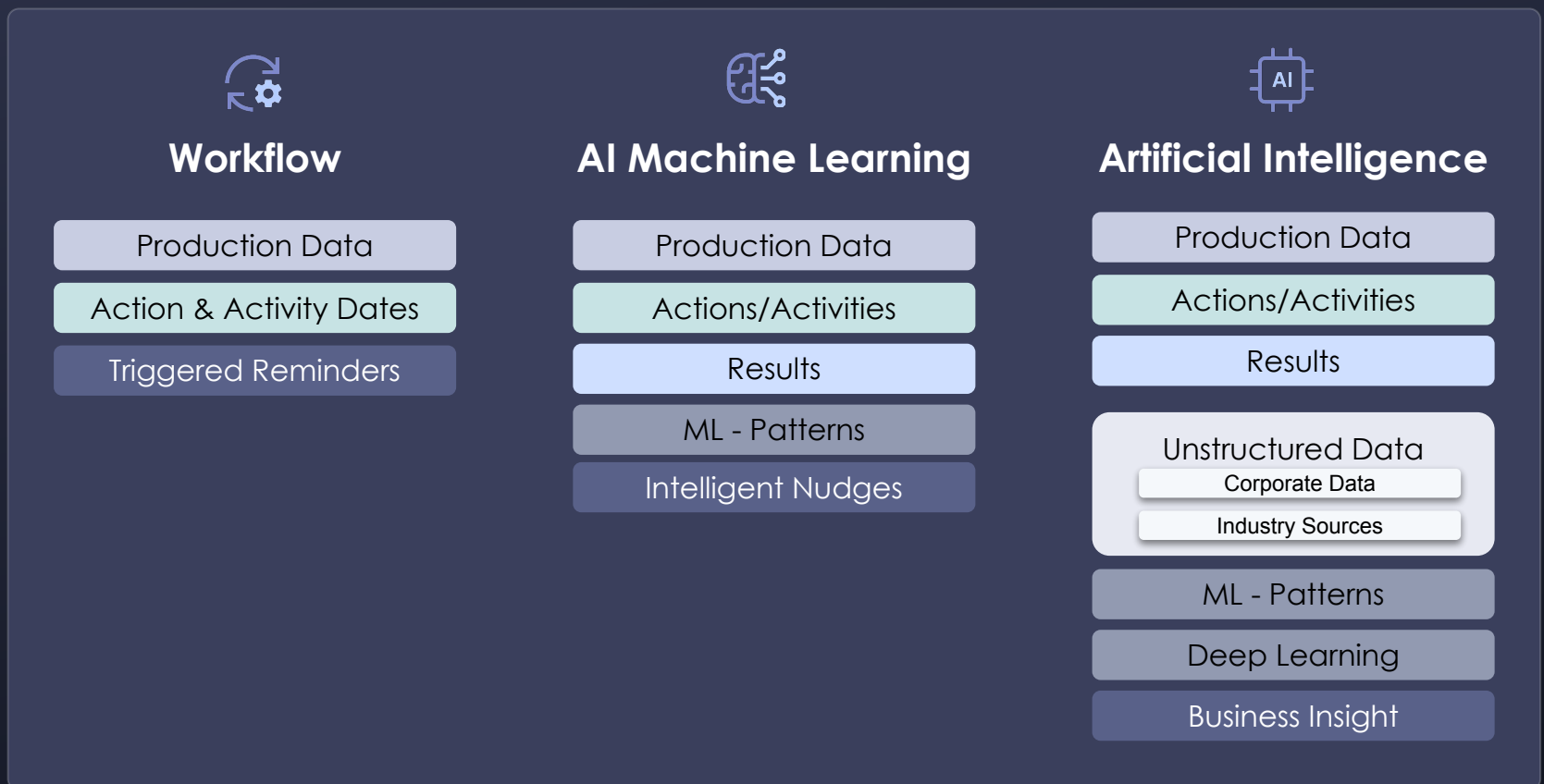
Artificial Intelligence

- 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 DistributionHub 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



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 increase propensity of an outcome

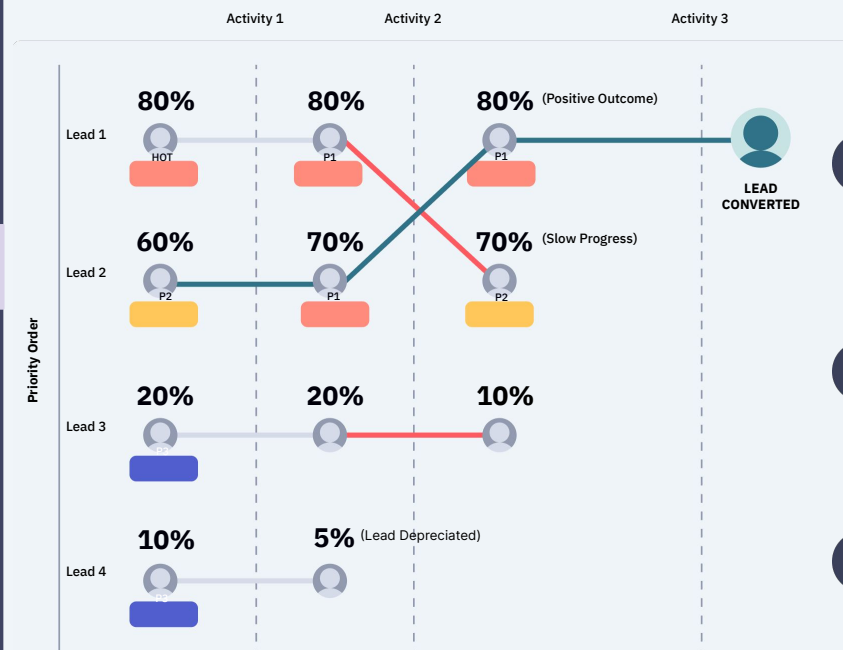
Lead Scoring Engine

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 for cold leads
- 4x increase in policy issuance for hot leads

Released



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

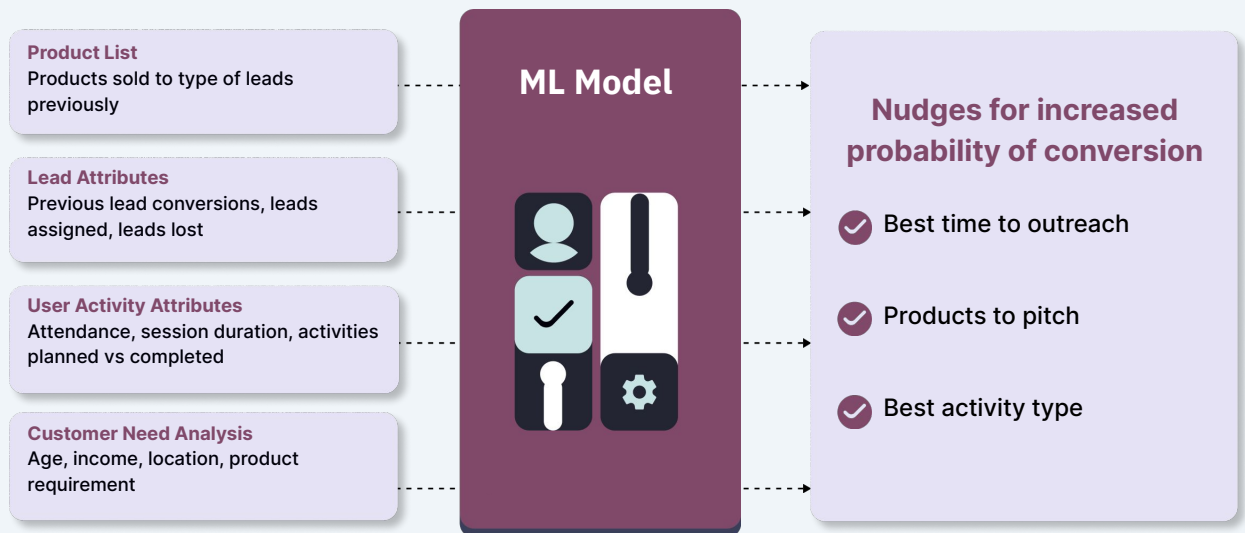
It is based on a vast amount of historical data on lead conversions

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



SAMPLE NUDGES

Boost conversion to 39% SUGGESTION
Schedule meeting by 01:30 PM today and pitch Fortune Maxima
[Schedule Activity](#) [Call](#)

Boost conversion to 89% SUGGESTION
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

 Product Recommendation PL top-up offer is great fit for customers with car loan interests!	SUGGESTION
 Show me later	 Call them now
 Nearby Client The Catch Seafood Rooms & Oyster Bar is nearby. Why don't you meet him?	SUGGESTION
 View Details	 Schedule Meeting
 High Potential Client Looks like this client has a high potential for up-sell due to their recent purchases, want to place a call?	SUGGESTION
 Schedule Activity	 Call
 Business loan opportunity created for lead Rohan Roy (Global Innovations Inc.) 4 days back. Follow up required.	URGENT
 Update Lead	 Call

Vymo's nudge engine does the following:



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

Thank You

For more information, please email

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Visit for more info →

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