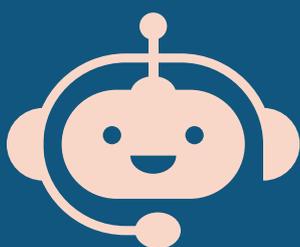


# SCREENING NEW LEADS WITH CHATGPT USING OPENAI

*This case study highlights OpenAI-powered chatbot significantly increased lead screening efficiency, successfully handling after-hours inquiries and engaging with 17% of clients upon initial interaction, showcasing its transformative impact on customer engagement..*

## KEY METRIC

*the chatbot successfully screened 36% of all leads, and 17% of clients responded to the first bot messages*



**screened 36%  
of all the leads**

## SUMMARY

---

Having a vast customer database, our client faces many challenges regularly. Their contact agents receive numerous daily messages, which takes time to manage. It created a huge issue since the agents could only attend to some possible clients. Because of such problems, this led to:

- Poor Customer Experience
- Loss of Trust
- Missed Opportunities
- Decreased Productivity
- Increased Escalations

To assist them with this problem, we introduced a conversational AI Chatbot using OpenAI. This had an excellent outcome, as we trained the model to interact with the end user.

## BUSINESS CHALLENGES

---

Our client aims to offer excellent service to meet their clients' needs and provide immigration help worldwide. However, they faced challenges:

- Limited Availability: The firm had restricted hours, making it hard for clients to get help or schedule meetings outside those times.
- Missed Opportunities: Clients contacting the firm after hours might have urgent issues. Respond promptly to avoid missed chances and clients going to other services.



### Revolutionized customer experience



### Enhanced accessibility and responsiveness



### Optimized resource utilization

- **Inefficient Manual Handling:** Dealing with after-hours inquiries manually was challenging. The firm needed a system to handle these requests effectively.
- **Scheduling Conflicts and Delays:** Coordinating schedules between legal reps and clients was complex, causing delays and difficulties finding convenient meeting times.
- **Missed Opportunities and Disorganization:** Manual scheduling sometimes leads to missed chances or disorganized schedules, impacting the firm's ability to engage clients effectively.

## SOLUTION PROVIDED

---

The team set essential goals for the chatbot, such as qualifying leads, engaging with clients initially, and directing them to the proper legal representatives. They gathered much data on common questions, legal issues, and past client interactions. This data was used to teach the chatbot through the OpenAI language model, helping it understand and respond well to different queries. Using OpenAI's API, the team built and refined the chatbot's ability to have natural conversations. They specifically focused on ensuring the bot could understand complex legal questions and provide relevant information. The chatbot was added to the website and other communication channels. Through thorough testing, the team confirmed the bot was accurate, responsive, and seamlessly integrated into the existing lead management system. Once deployed, the chatbot started handling incoming inquiries on its own. The team monitored its performance, gathered feedback, and continuously improved the bot's responses by retraining and fine-tuning.

## IMPACT ON BUSINESS

---



**Increased productivity  
and satisfaction**

The OpenAI-powered chatbot revolutionized our client's business, enhancing customer experience by ensuring 24/7 accessibility and responsiveness. It efficiently handled after-hours inquiries, minimized scheduling conflicts, and streamlined lead qualification, optimizing resource utilization. The result was increased productivity, reduced escalations, and a positive shift in client satisfaction, showcasing the transformative impact of this innovative solution. Moreover, the chatbot successfully screened 36% of all leads, and 17% of clients responded to the first bot messages, further illustrating its effectiveness in engaging with potential customers.



**Successfully  
screened leads**