



# SMART SELL

Engage | Understand User Needs | Deepen Engagement  
Convert | Sell | Retain



# What do we Do differently ?

## Engage

Capture attention with personalized content, gamification, and outreach (email, notifications).

## Understand

Use analytics and surveys to learn user needs and behaviors.

## Deepen Engagement

Offer goal-specific solutions, dynamic recommendations, and free trials.

## Convert

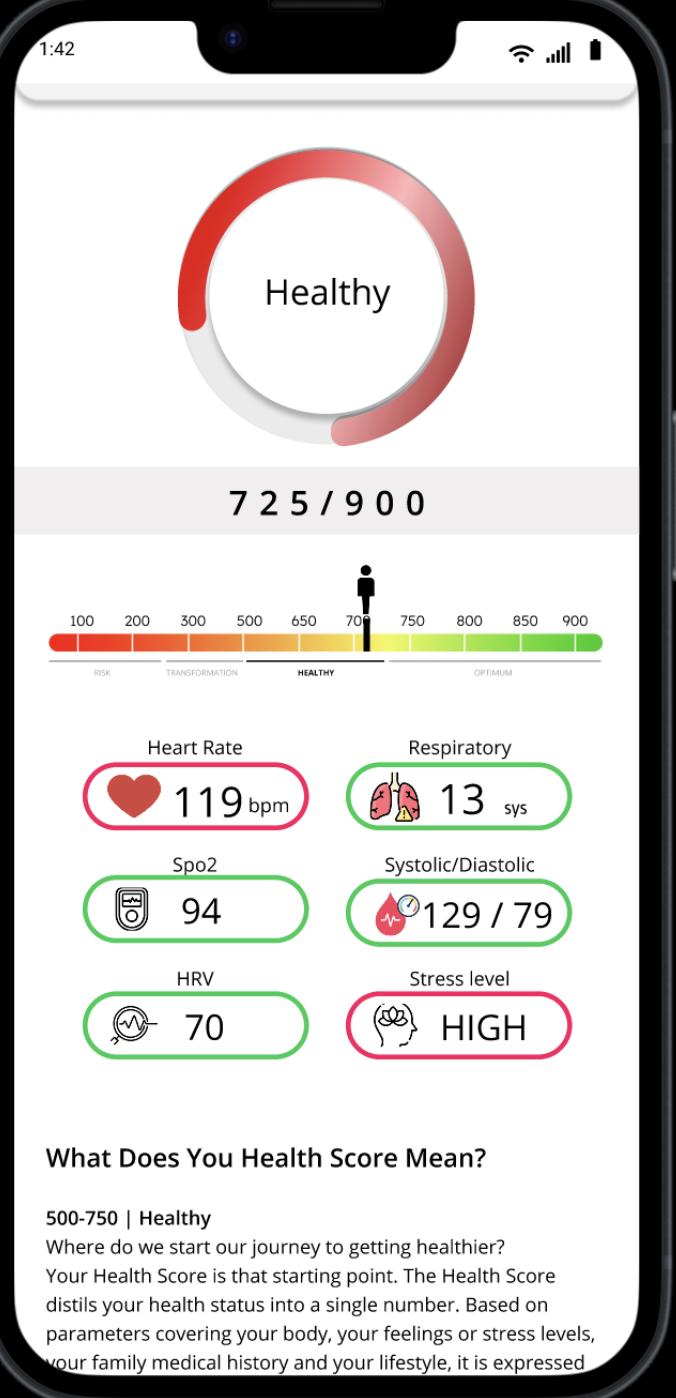
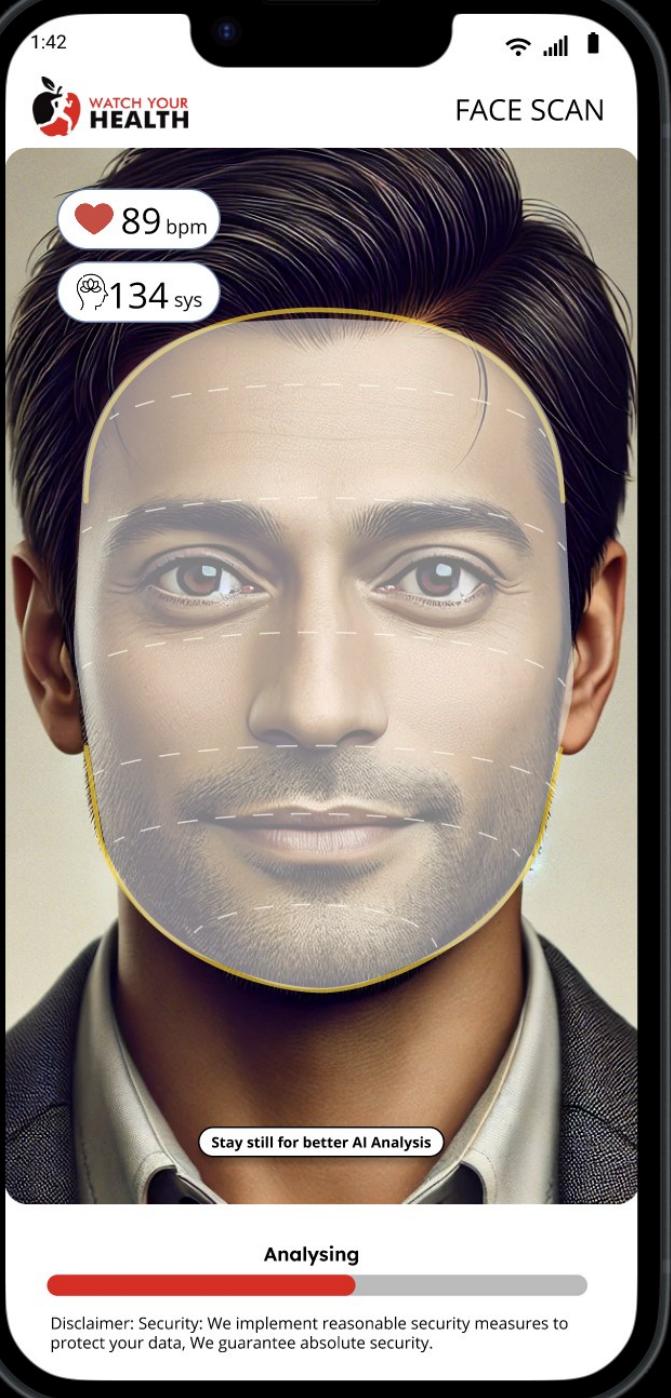
Guide users to buy with tailored offers, discounts, and smooth UX.

## Sell

Finalize transactions and upsell complementary products.

## Retain

Build loyalty with rewards, follow-ups, and personalized engagement for repeat sales.



## Engage

Upon accessing Smart Sell through the client portal, users are welcomed with a quick introduction to the Face Scan AI tool.

This gives them a unique experience right from the start.

## Understand needs

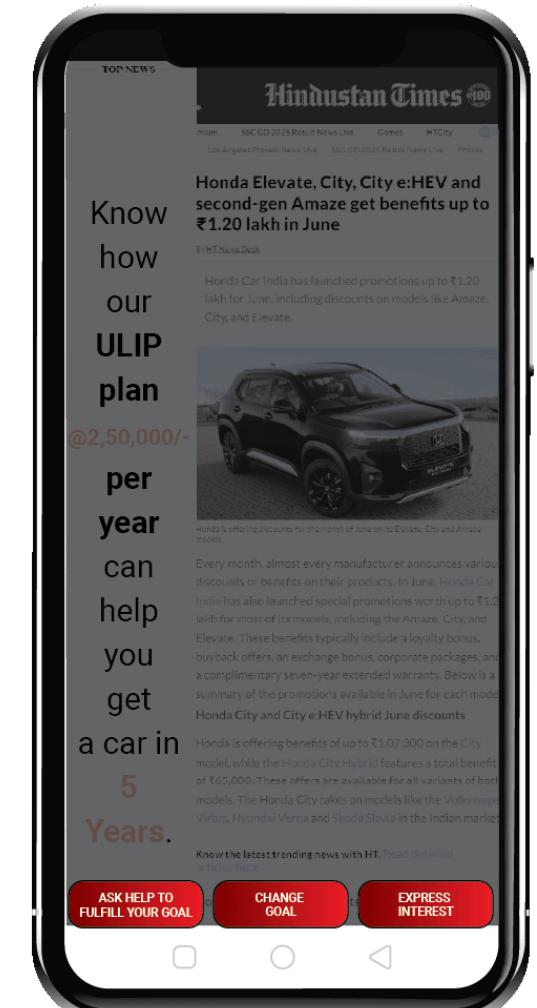
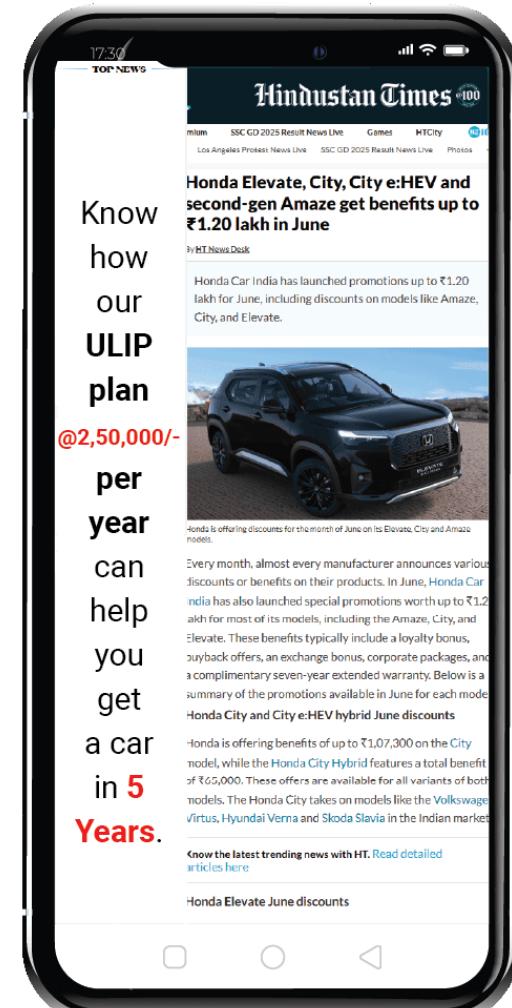
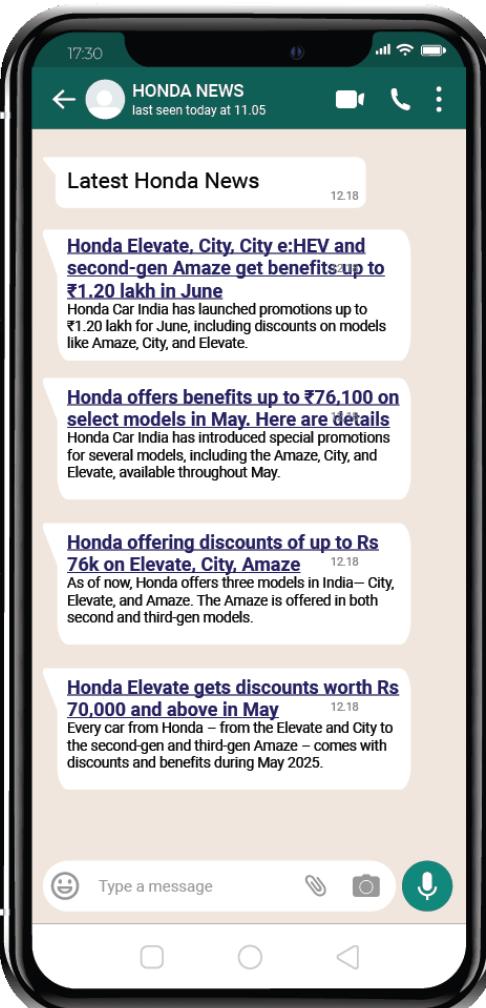
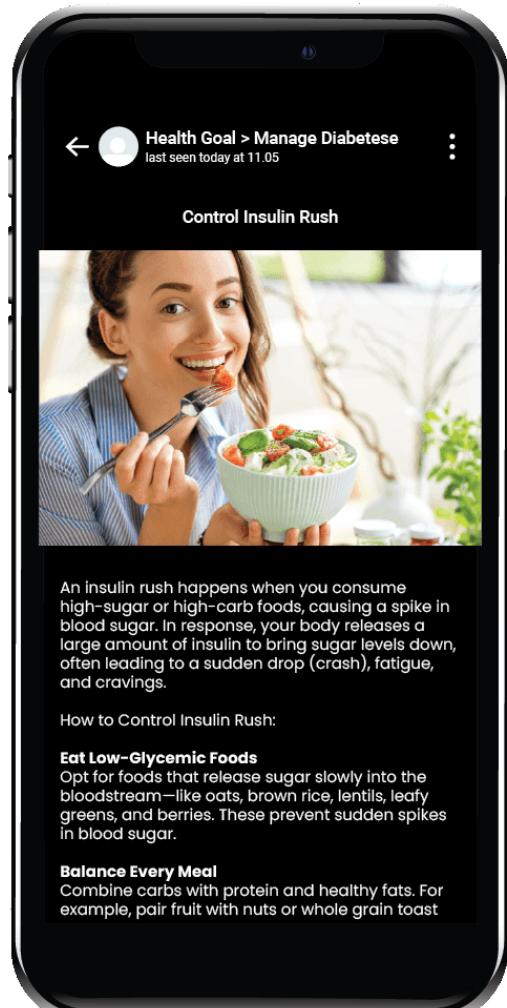
Users then choose an area of interest.

This initial choice helps Smart Sell decide the best path forward for cross-sell and up-sell suggestions, aligning the recommendations closely with user priorities.



## • Deepen - TAGGING AND PERSONALIZATION

- Based on their choices and interactions, users are tagged with various attributes.
- For example, a user focused on wealth might be tagged with attributes like "Financial Literacy" or "Investment Enthusiast," leading them to receive financial products.



Dashboard



Customers



Reports



**Customers Details**



**Sanjay Gupta**  
• Active

Mobile Number  
+91 9734743308

Age  
38 Years

Gender  
Male

Height  
5.8 Inch

Weight  
72 KG



60%  
Lead Score

**EBR Score**

50%
100%
50%
40%
80%
40%
80%
40%

Curiosity      Cooperation      Adaptability      Empathy      Assertiveness      Resilience      Integrity      Discipline

**User Goals**

Home      Wealth Creation      Mental Wellness

**Tech Tags**

#securityconcern
#ulip
#superlead
#matured
#HealthInsurance
#realestateinvestment
#mutualfund
#bonds
#lifeinsurance
#impulsivebuyer
#term
#superleadforhealth
#healthinvestment

**Engagement Tags**

#home
#location
#size
#saving
#smartsaving
#fd
#term
#ulip
#sip
#MutualFund
#wealth
#future
#equity

**Recommend Plan**

Shriram Life Assured Saving Plan

>

Coverage  
₹1000000.00

Premium  
₹5000.00

9:41



## EBR Discipline Index of User

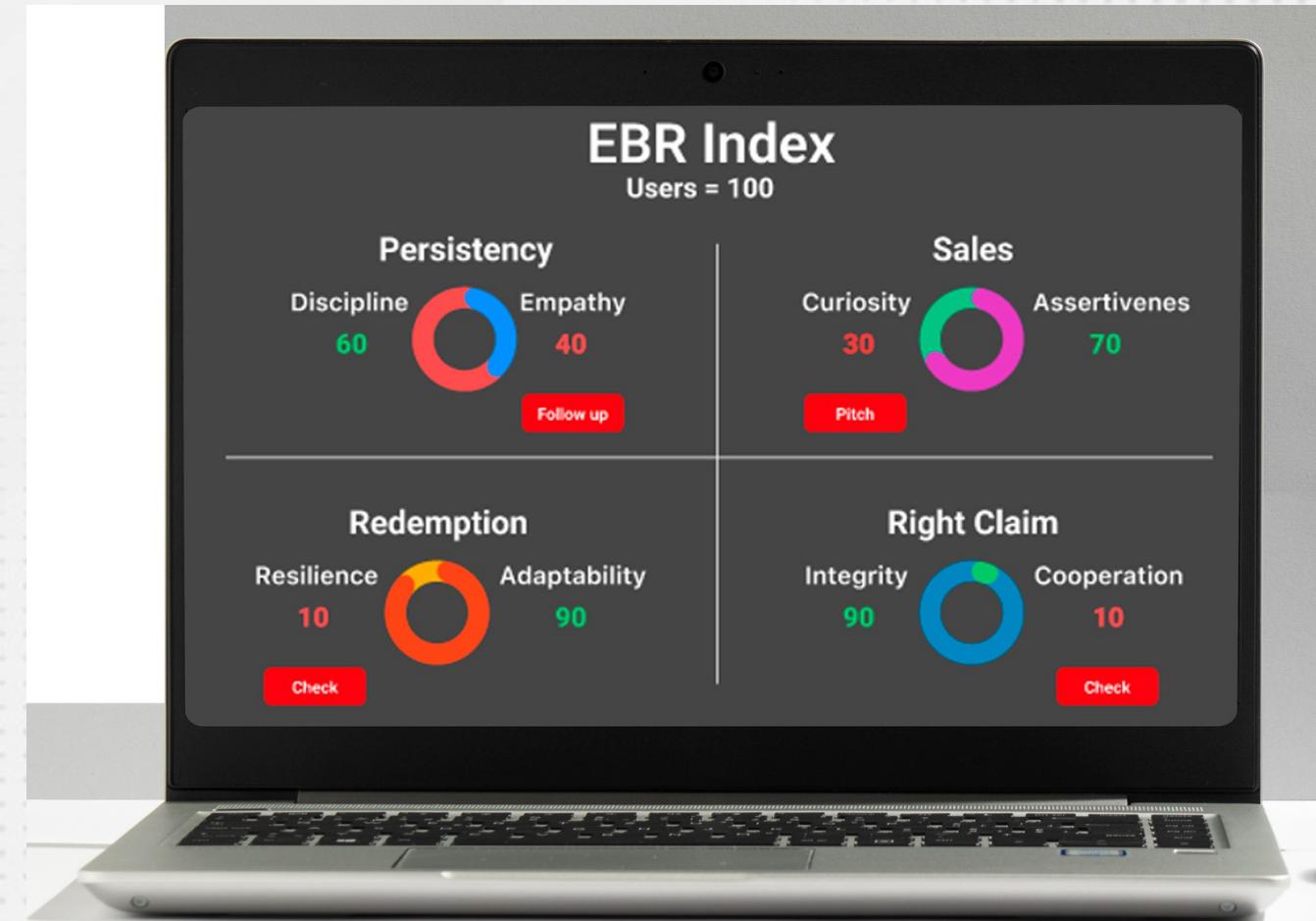
Sample Discipline Index  
Result of a User



Overall Score: 80%  
Raj is a Good User.

Know More

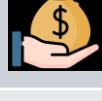
# Convert - SECRET SAUCE



# Smart Sell™ Success Matrix

## Turning Conversations into Conversions



	Success Lever	Impact
	<b>Ice-Breaking Made Easy</b>	1.5× increase in meetings via personalized health-based conversation starter.
	<b>Conversion Accelerator</b>	30% higher sales conversion through smart customer engagement.
	<b>Efficient Selling</b>	Avoid uninterested customers – Save over 25% of agent time.
	<b>Insight-Led Dashboard</b>	Track engagement, lead quality, and agent performance at scale.
	<b>Powerful ROI Pricing</b>	Just \$6,000/month + 5% of premium – Scalable, transparent, high-ROI.
	<b>Dry Leads Activation</b>	Revives unresponsive leads by offering meaningful health insights.
	<b>Multi-Channel Access</b>	App, Website, WhatsApp Link – Designed for maximum accessibility.
	<b>Customer Need Discovery</b>	Insurance companies gain real-time insight into customer health & life goals.



# Thank You!



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<https://www.watchyourhealth.com>