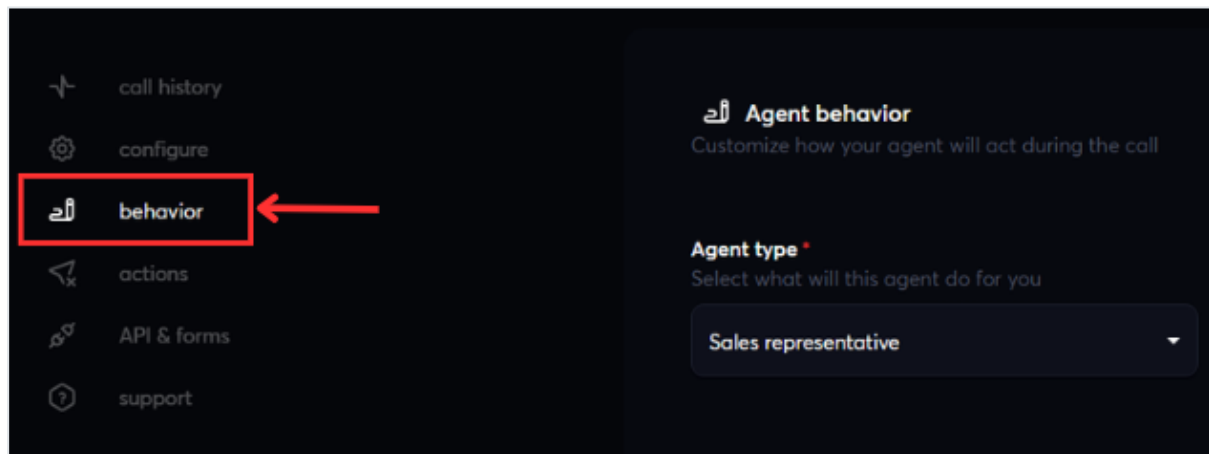


## Step-by-Step Guide

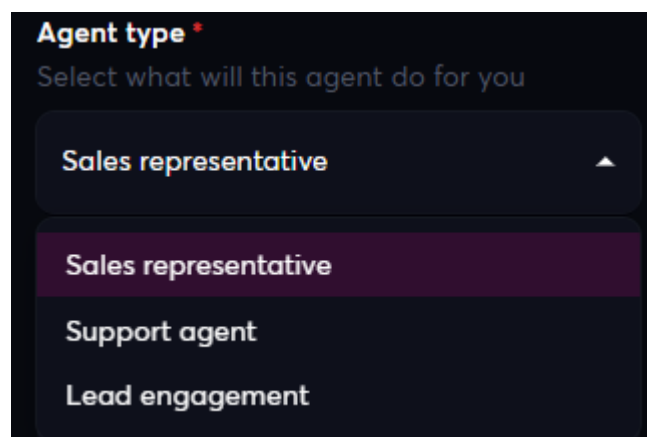
### 1. Accessing the Customize Behavior Section

1. Login to CallVance™ AI Dashboard:
  - Access your CallVance™ AI dashboard and select your workspace.
2. Open the Customize Behavior Section:
  - Navigate to the agent you want to customize and open the customization options.



### 2. Selecting Agent Type

1. Choose Agent Type:
  - Sales Rep: Optimized for pitching and converting leads.
  - Support Agent: Focuses on customer inquiries and support.
  - Lead Engagement: A raw agent that can be customized from scratch.



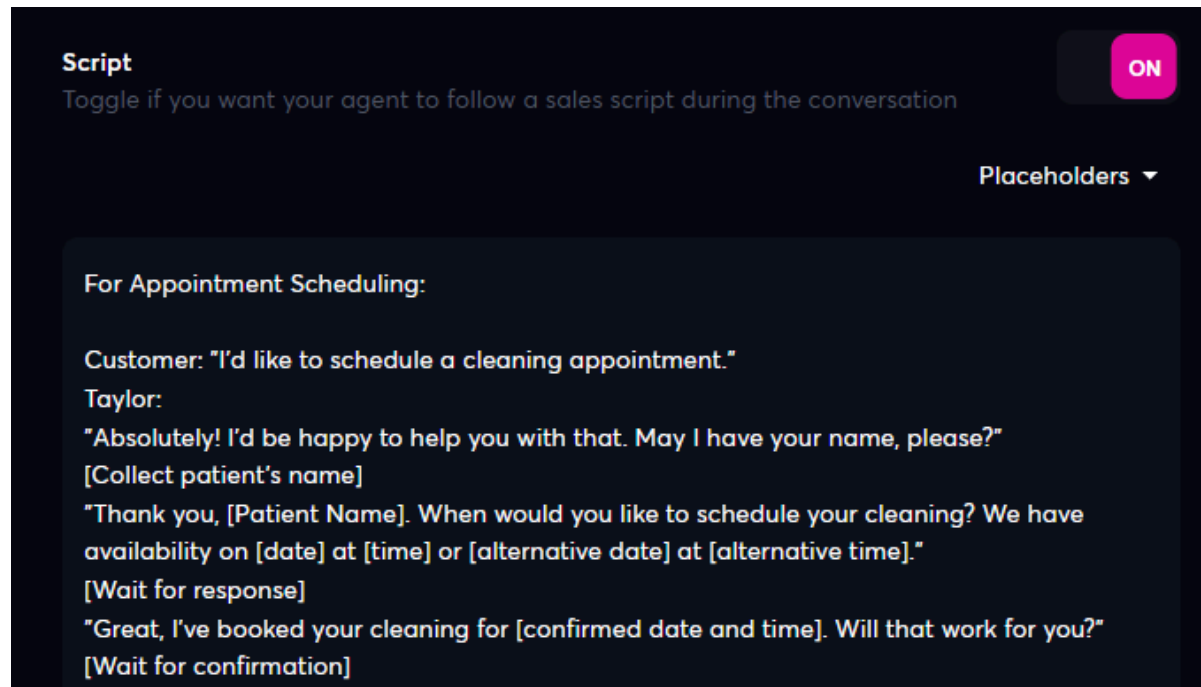
2. For this guide, select the Sales Rep type:

- This type includes an extra feature for sales scripts, essential for consistent and successful calls.

3. Configuring the Sales Script

1. Sales Script Field:

- Toggle the sales script field on.



- Provide the agent with a detailed script to follow during conversations.
- Ensure the script contains exact phrases the agent should say to maintain consistency and conversion tracking.

4. Using the Prompt Builder

1. Goal Field:

- Define the agent's main goal (e.g., convert the caller to book a meeting or make a purchase).
- Example: "Your goal is to schedule appointments and handle inquiries for our medical clinic."

2. Background Field:

- Provide professional background information about the agent (e.g., experience, role).
- Example: "You have 5 years of experience in sales and specialize in healthcare services."

**Agent behavior**  
Customize how your agent will act during the call

**Agent type \***  
Select what will this agent do for you  
Sales representative

**Tone \***  
Select the tone of your agent  
Professional

**Goal \***  
Tell your agent what is his goal  
Your primary goal is to provide exceptional service

**Background \***  
Explain your agent's background  
Name: Morgan Chase Age: 38 Work Experience: 1

3. Instructions Field:

- Detail how the agent should conduct the conversation, including greeting, speaking style, and specific information to provide.
- Example: "Greet callers warmly, provide information on our services, and answer frequently asked questions."

**Instructions \***  
Tell your agent what to do during the conversation

[Browse Templates](#)

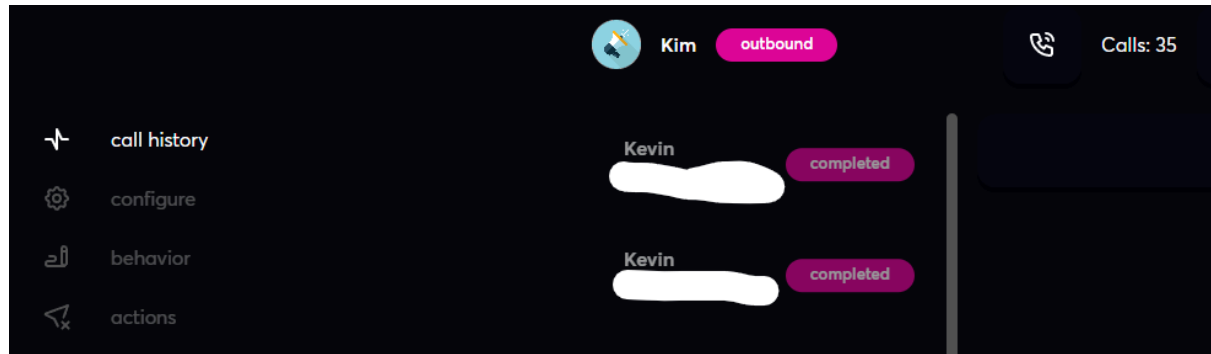
**Communication Style:**

Speak with a friendly and reassuring tone, adapting to the caller's emotional state.  
Use natural pauses and occasional filler words like "um," "let's see," or "absolutely" to maintain a conversational flow.  
Listen actively to the caller's concerns and ask clarifying questions to fully understand their

1. Review Call History:

- Check the call history and transcripts to evaluate the agent's performance.

- Identify areas for improvement based on the conversation transcript.



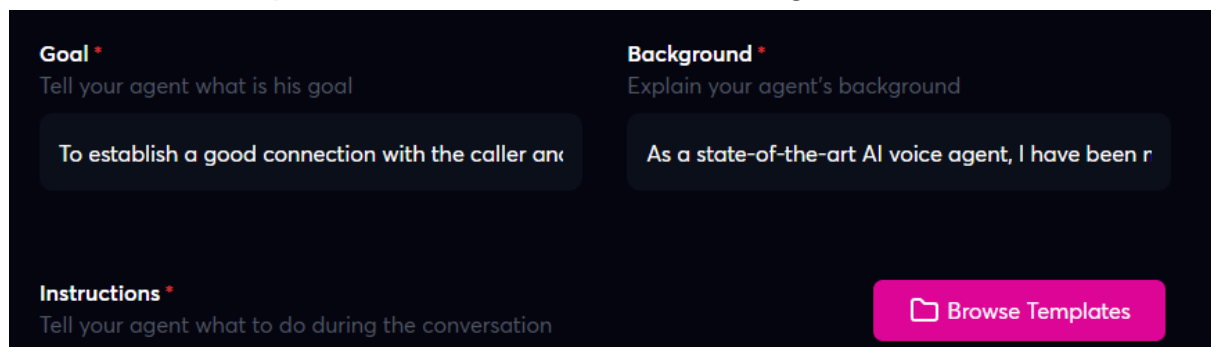
## 6. Continuous Improvement

### 1. Fine-Tuning Instructions:

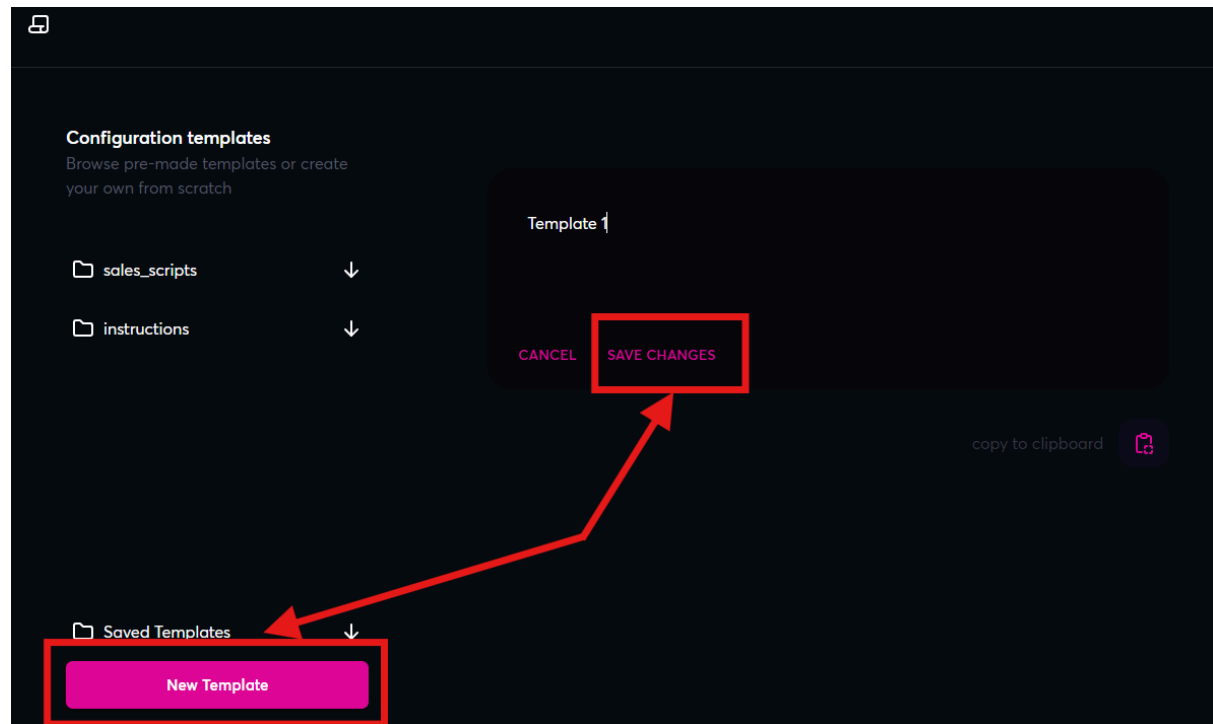
- Regularly update the instructions based on call recordings and customer interactions.
- Add new information and refine responses to improve the agent's performance.

### 2. Using Templates:

- Save custom templates for future use or for other agents.



- Edit and manage templates to streamline the agent creation process.



By following these steps, you have successfully optimized your CallVance™ AI sales agent for effective conversations.

Regular testing and fine-tuning will ensure your agent remains efficient and engaging, leading to better sales outcomes.

Stay tuned for our next tutorial on integrating your agent with web forms and actions.