BetterConversion AI - User Guide

08/19/2025

Welcome to BetterConversion AI

Your Enterprise Meeting Intelligence Platform

BetterConversion AI is a comprehensive platform that transforms how you manage meetings, collaborate with AI agents, and track client relationships. This guide will walk you through every feature and show you how to maximize your productivity.

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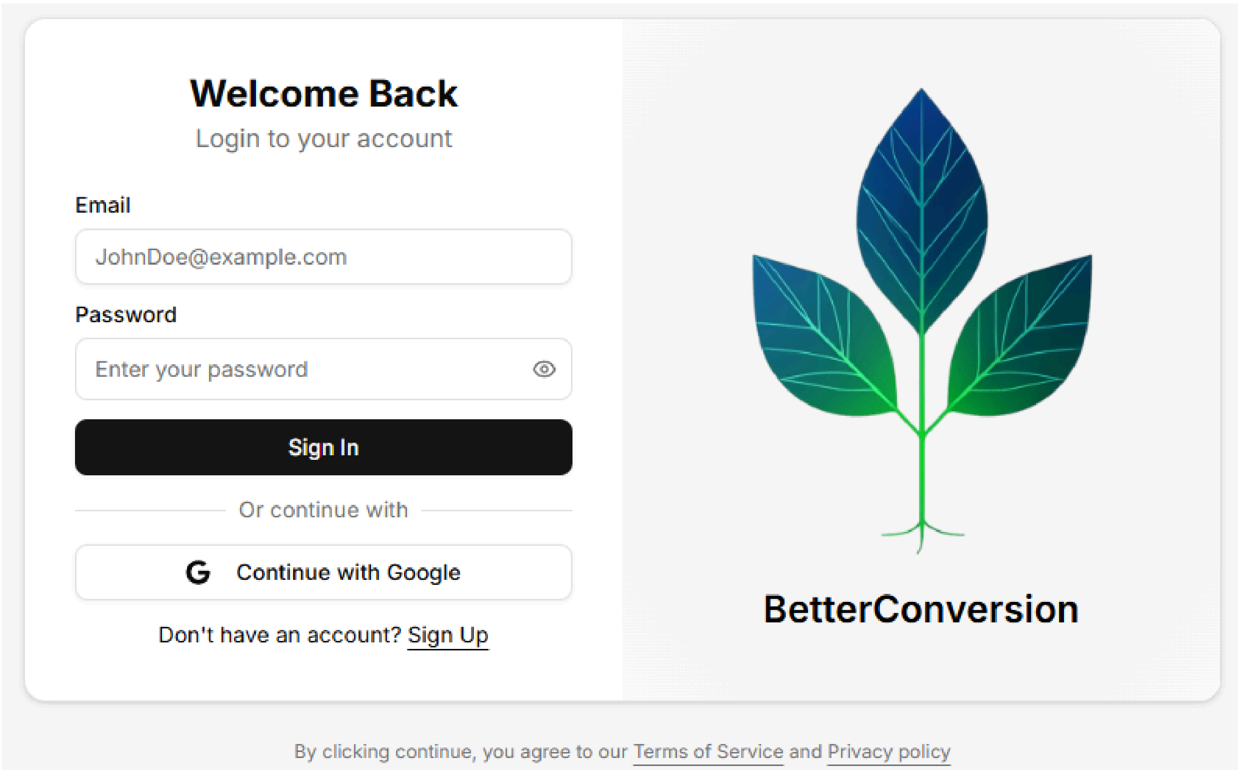
🎯 Getting Started

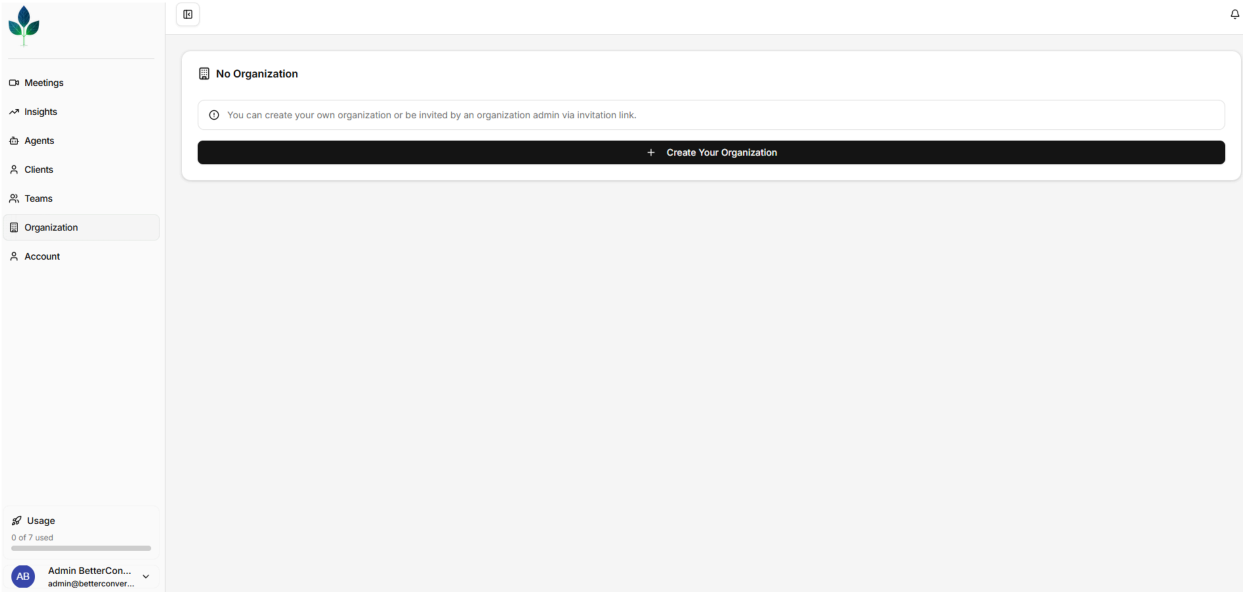
First Time Setup

1. Account Creation & Sign In



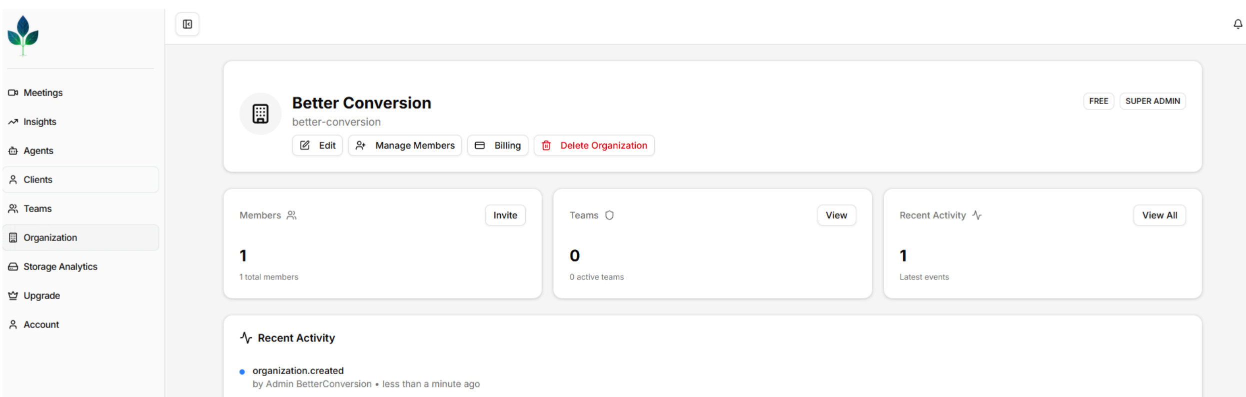
- Visit the BetterConversion AI platform
- Click **"Sign In"** or **"Sign Up"**
- Use your Google account for seamless authentication
- Complete your profile information

2. Organization Setup



After signing in, create your organization or get invited by the admin of another organization.

3. Understanding Your Dashboard



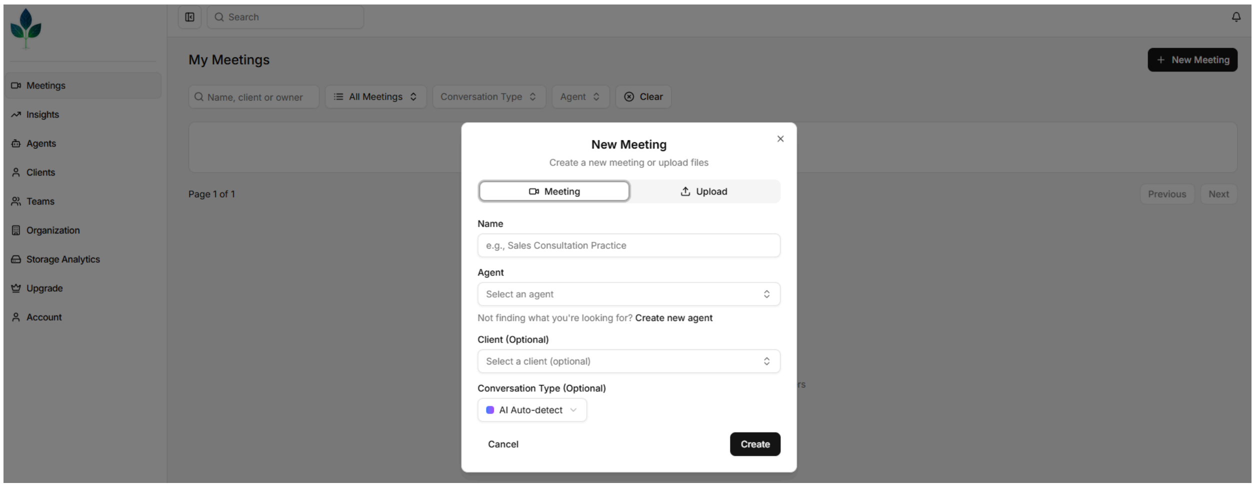
Your dashboard provides:

- **Quick Stats**: Meeting count, active agents, client status
- **Recent Activity**: Latest meetings and updates
- **Navigation Sidebar**: Access to all platform features
- **Organization Switcher**: Switch between multiple organizations (if applicable)

📹 Meetings - Your Central Hub

Creating Your First Meeting

Starting a New Meeting



1. Click **"Meetings"** in the sidebar
2. Click **"+ New Meeting"** button
3. Fill in meeting detail

Meeting Types Explained

Live Meetings *(Meeting)*

- Real-time video conference with an AI Agent
- *Recommendation: Use this meeting type to practice sales against a mock client or to discuss with a specific agent for strategy.*

File Analysis Meetings *(Upload)*

- Upload meeting recordings or documents
- AI processes and transcribes content
- Perfect for analyzing past meetings
- *Recommendation: Have the sales team regularly submit and review meetings together to identify what works well and what needs adjustment.*

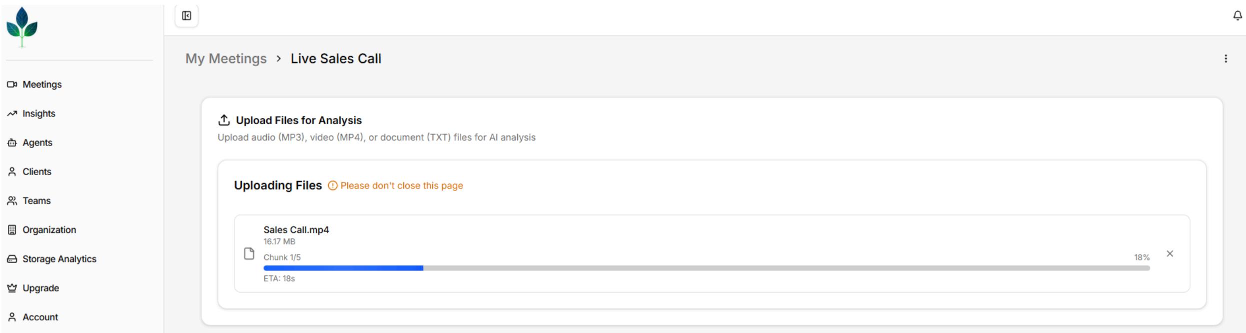
During a Live Meeting

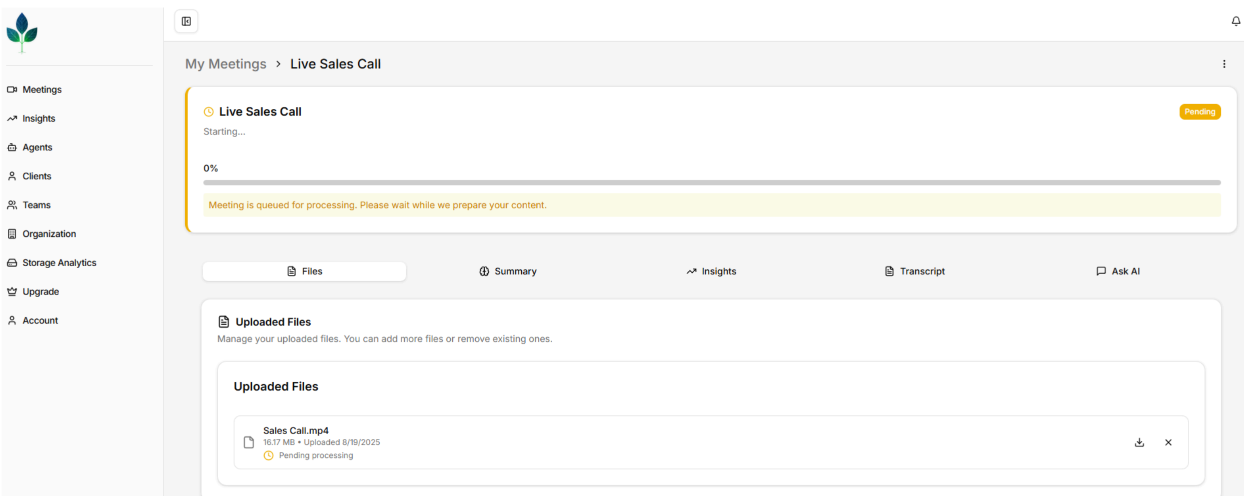
The Meeting Interface

Video Controls

- Camera on/off toggle
- Microphone mute/unmute
- Leave meeting option

Meeting States & Progress





Processing Phase

After meeting completion:

- AI transcribes audio content
- Generates meeting insights
- Extracts key discussion points
- Creates actionable summaries
- Progress bar shows completion status

Meeting Insights & Analysis

Viewing Meeting Results

Transcript Section

- Complete word-for-word transcription
- Speaker identification
- Timestamp markers
- Search functionality
- Export options

AI-Generated Insights

- Meeting effectiveness score

Comments & Collaboration

- Team members can add comments
- @mention notifications

🤖 AI Agents - Your Intelligent Assistants

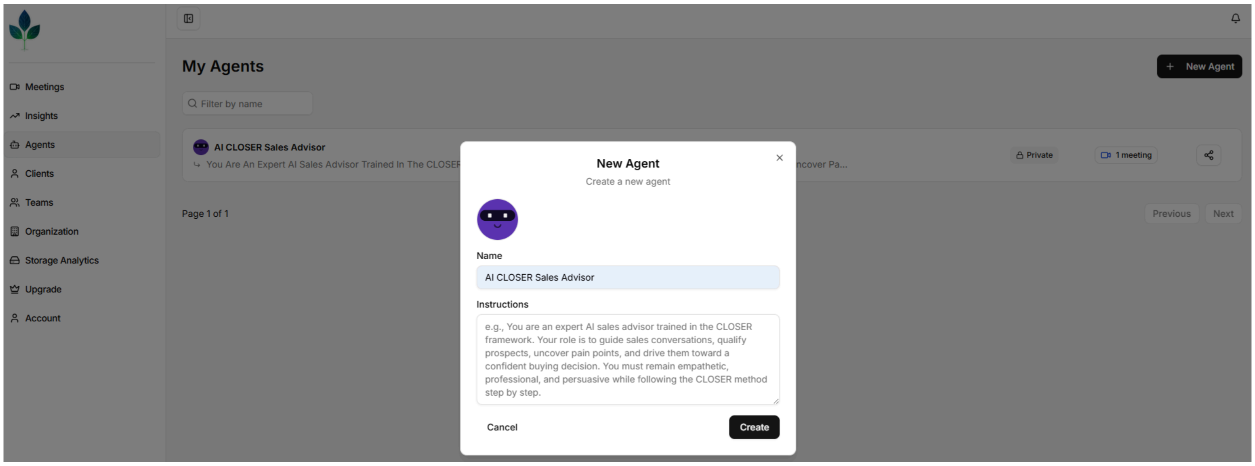
Understanding AI Agents

AI Agents are specialized assistants that:

- Join meetings as active participants
- Provide domain-specific expertise
- Analyze conversations in real-time
- Offer intelligent suggestions
- Maintain context across interactions

Creating Custom Agents

Agent Configuration

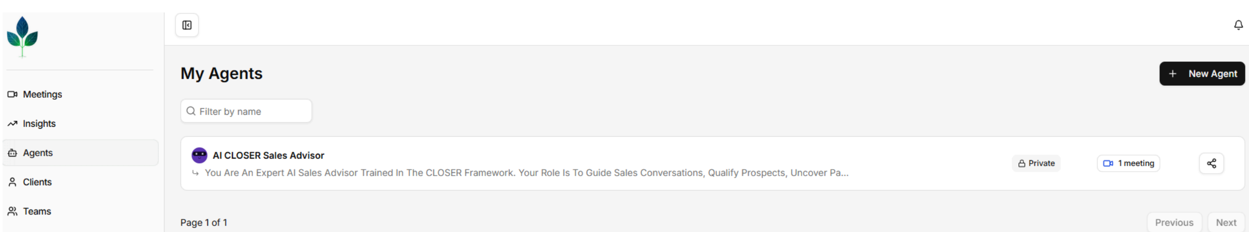


Basic Information

- **Name**: Clear, descriptive agent name
- **Description**: Agent's role and purpose
- **Instructions**: Specific behavioral guidelines
- **Visibility**: Private, Team, or Organization-wide

Agent Management

Your Agent Library



Agent Types Examples

- **Sales Coach**: Analyzes sales conversations, suggests improvements
- **Technical Expert**: Provides technical insights during product demos
- **Client**: Acts as a client to practice objection handling or parts of the sales process

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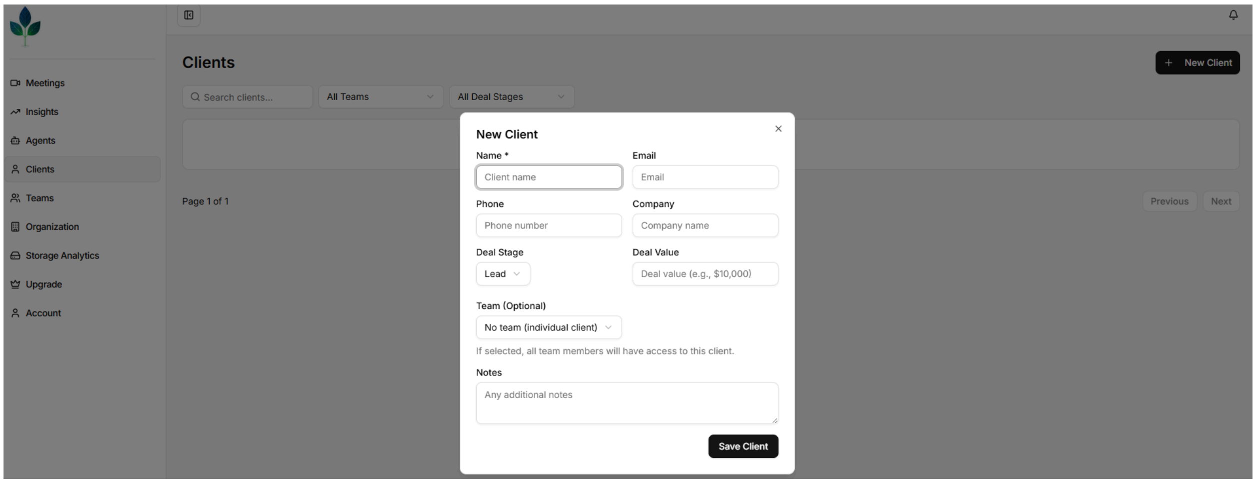
👥 Client Management - Your CRM System

Building Your Client Database

Adding New Clients



Essential Information

- **Contact Details**: Name, email, phone
- **Company Information**: Organization, role, industry
- **Deal Information**: Pipeline stage, deal value
- **Relationship Status**: Lead, qualified, negotiating, closed

Deal Pipeline Management

Understanding Deal Stages

Standard Pipeline Stages

1. **Lead**: Initial contact made
2. **Qualified**: Meets buyer criteria
3. **Proposal**: Formal proposal submitted
4. **Negotiation**: Terms being discussed
5. **Closed Won**: Deal successfully completed
6. **Closed Lost**: Opportunity ended

🏢 Organization & Team Management

Multi-Tenant Organization System

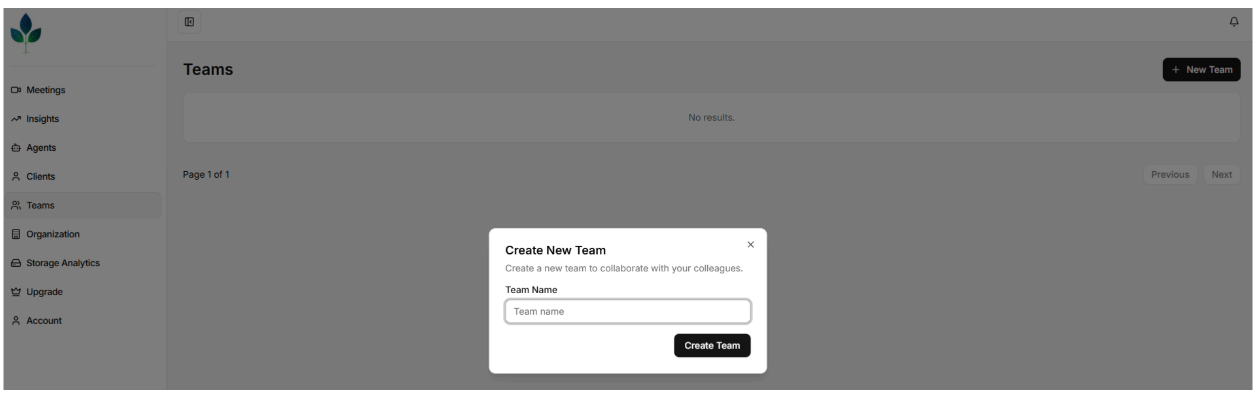
Organization Structure

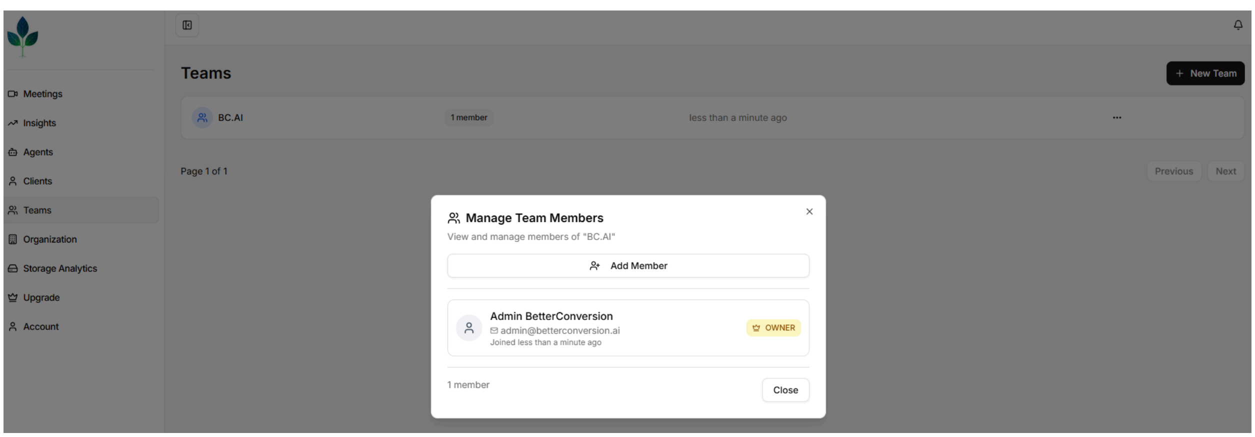
Role Hierarchy

- **Super Admin**: Platform-wide control
- **Organization Admin**: Full org management
- **Team Lead**: Team-level management
- **Member**: Standard user access

Team Collaboration

Creating Teams





Team Setup

- **Team Name**: Clear team identification
- **Member Invitations**: Add team members
- **Permission Levels**: Owner, Manager, Member

Team Workspaces

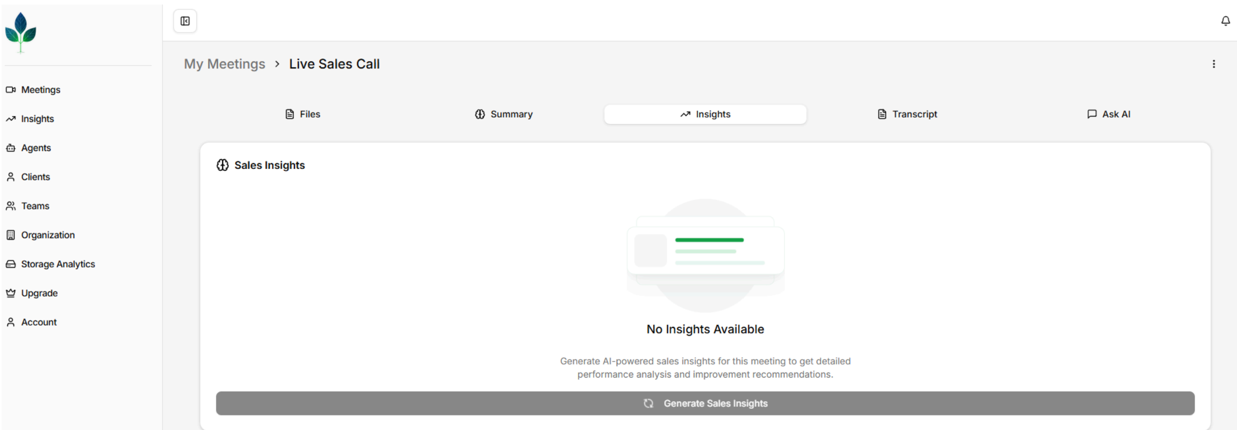
Shared Resources

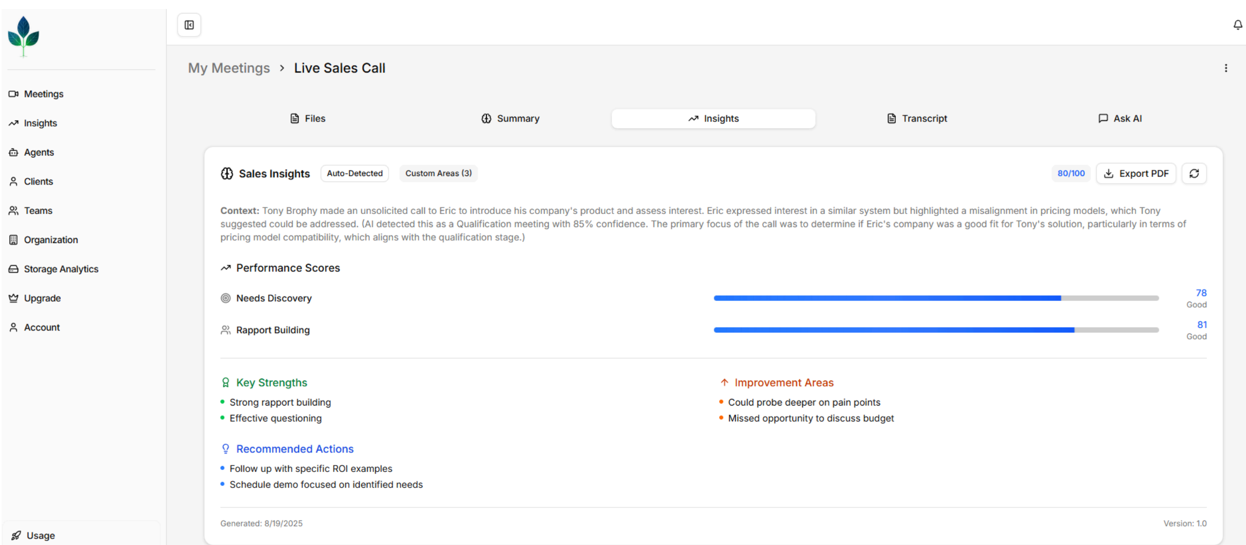
- **Team Meetings**: Collaborative meeting spaces
- **Shared Agents**: Team-accessible AI assistants
- **Client Assignments**: Team-managed clients
- **Team Analytics**: Performance tracking

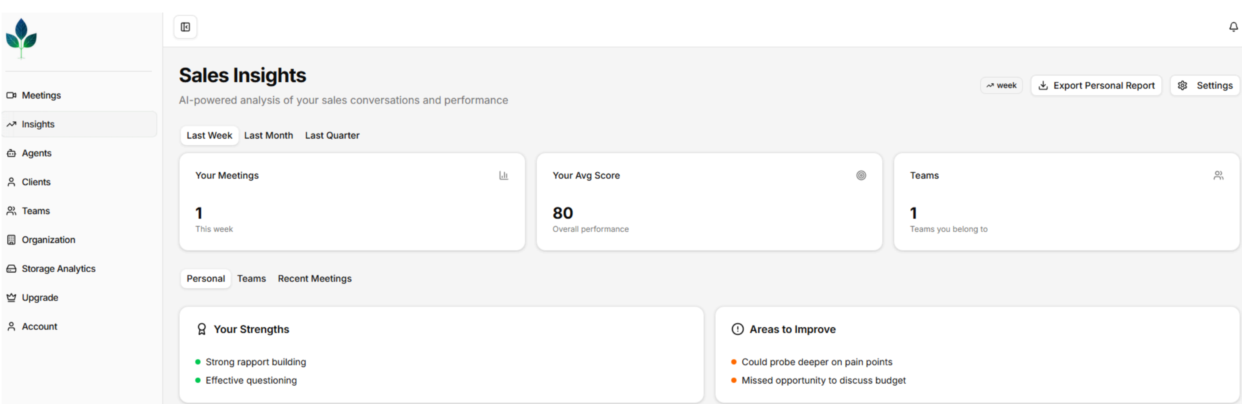
📊 Insights & Analytics

Meeting Intelligence

AI-Powered Analysis







Automated Analysis

- **Meeting Effectiveness**: Scoring across multiple dimensions
- **Conversation Quality**: Engagement and participation metrics
- **Key Topic Extraction**: Important discussion points

Custom Analysis Settings

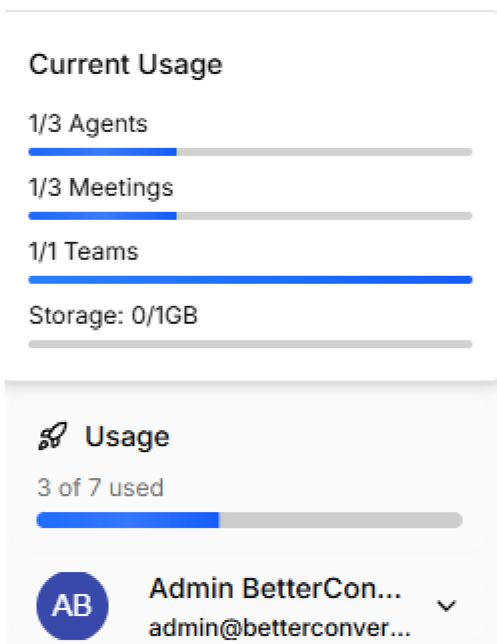
Customizable Prompts

- **Organization-Specific**: Tailored to your business
- **Industry Standards**: Best practice benchmarks
- **Custom Metrics**: Your unique success criteria
- **Analysis Focus**: Sales, technical, support

💳 Billing & Subscription Management

Understanding Pricing Tiers

Free Tier (Starter Business)



Included Features

- 3 meetings per month
- 3 custom AI agents

- 1 team per organization
- 1GB storage space
- 3 user licenses

Premium Subscription

Flexible Pricing

- **Monthly**: $32 per user per month
- **Annual**: $24 per user per month (25% savings)
- **Unlimited**: Meetings, agents, teams
- **Enhanced Storage**: 100GB base + $2.50/25GB add-ons
- **Advanced Features**: Sales insights, priority support

Managing Your Subscription

License Management

User License Control

- **Add/Remove Users**: Dynamic scaling
- **Role Assignment**: Proper permission levels
- **Usage Monitoring**: Track resource consumption
- **Automatic Billing**: Prorated charges

Storage Analytics

Storage Monitoring

- **Current Usage**: Real-time consumption
- **Storage Breakdown**: Files, recordings, documents
- **Upgrade Options**: Additional storage packages
- **Optimization Tips**: Reduce storage usage

⚙️ Account & Settings

Personal Account Management

Profile Settings

Account Information

- **Personal Details**: Name, email, profile picture
- **Notification Preferences**: Email and in-app alerts
- **Privacy Settings**: Data sharing preferences
- **Security Options**: Password, 2FA settings

Organization Settings

Organization Control (Admin only)

- **Branding**: Logo, colors, custom styling
- **Usage Limits**: Resource quotas and restrictions
- **Feature Toggles**: Enable/disable functionality
- **Integration Settings**: Third-party connections

Security & Compliance

Data Security

Enterprise Security

- **Audit Logging**: Complete activity tracking

Privacy Controls

- **Data Retention**: Automatic cleanup policies
- **Export Options**: Download your data
- **Account Deletion**: Complete data removal
- **Consent Management**: Privacy preferences

Collaboration Features

@Mentions and Comments

Team Communication

- **@Mention**: Notify specific team members
- **Thread Discussions**: Organized conversations
- **Notification Delivery**: Instant alerts

🚀 Tips & Best Practices

AI Agent Best Practices

Agent Creation

[Screenshot placeholder: Agent best practices guide with configuration examples]

Effective Agents

- **Specific Instructions**: Clear, detailed guidelines
- **Contextual Knowledge**: Relevant organizational info
- **Appropriate Scope**: Not too broad or narrow
- **Regular Updates**: Keep instructions current

Agent Management

- **Performance Review**: Regularly assess effectiveness
- **Team Feedback**: Gather user input
- **Continuous Improvement**: Refine based on results
- **Role Specialization**: Focused expertise areas

Data Organization

File Management

Organization Strategy

- **Consistent Naming**: Clear, descriptive filenames
- **Folder Structure**: Logical organization system
- **Regular Cleanup**: Remove outdated files
- **Access Control**: Appropriate sharing permissions

Client Data

- **Complete Profiles**: Comprehensive contact information
- **Regular Updates**: Keep information current
- **Meeting Linkage**: Connect all client interactions
- **Team Collaboration**: Shared client insights