

Commercial conversion diagnosis

From web conversation to sales-ready
opportunity.

How to detect lost leads and decide whether a RAG agent can close the gap.

Reference case · Laura, commercial agent for Sigmart Group

ORBI-DIAG · LAURA-RAG · 001

Lead leakage

RAG agent

CRM

Sales Ops

01 • WHAT THE COMPANY RECEIVES

A diagnosis that ends in decisions

The \$150 deliverable is not a generic idea list. It documents the process, locates leakage, validates whether AI makes sense and recommends a prioritized next step.

Journey map

Channels, owners, systems, waits and points where lead context is lost.

Baseline

Events, fields and formulas needed to separate perception from evidence.

Commercial leakage

Leads without contact, qualification, registration or follow-up within SLA.

Technology decision

Form, automation, chatbot, RAG agent or combination, with rationale.

Solution design

Architecture, integrations, permissions, controls and human handoff.

Business case

Conservative, base and high scenarios—never a savings or sales promise.

Roadmap

Phases, exit criteria, risks, dependencies and implementation range.

Delivery session

Executive review to decide what to build, measure and discard.

DELIVERY COMMITMENT

Target delivery: one week after the required information is validated.

02 • EXECUTIVE SUMMARY

The decision in under three minutes

Example executive readout for a B2B company receiving technical inquiries through its website.

CORE FINDING

A leak exists between technical intent and commercial follow-up.

01 Signal

The inquiry arrives but does not always become an actionable record.

02 Risk

Sales receives incomplete contacts or responds after interest cools.

03 Opportunity

Instrument the journey and automate capture before adding AI.

04 Decision

Pilot a RAG agent if technical knowledge and CRM access are ready.

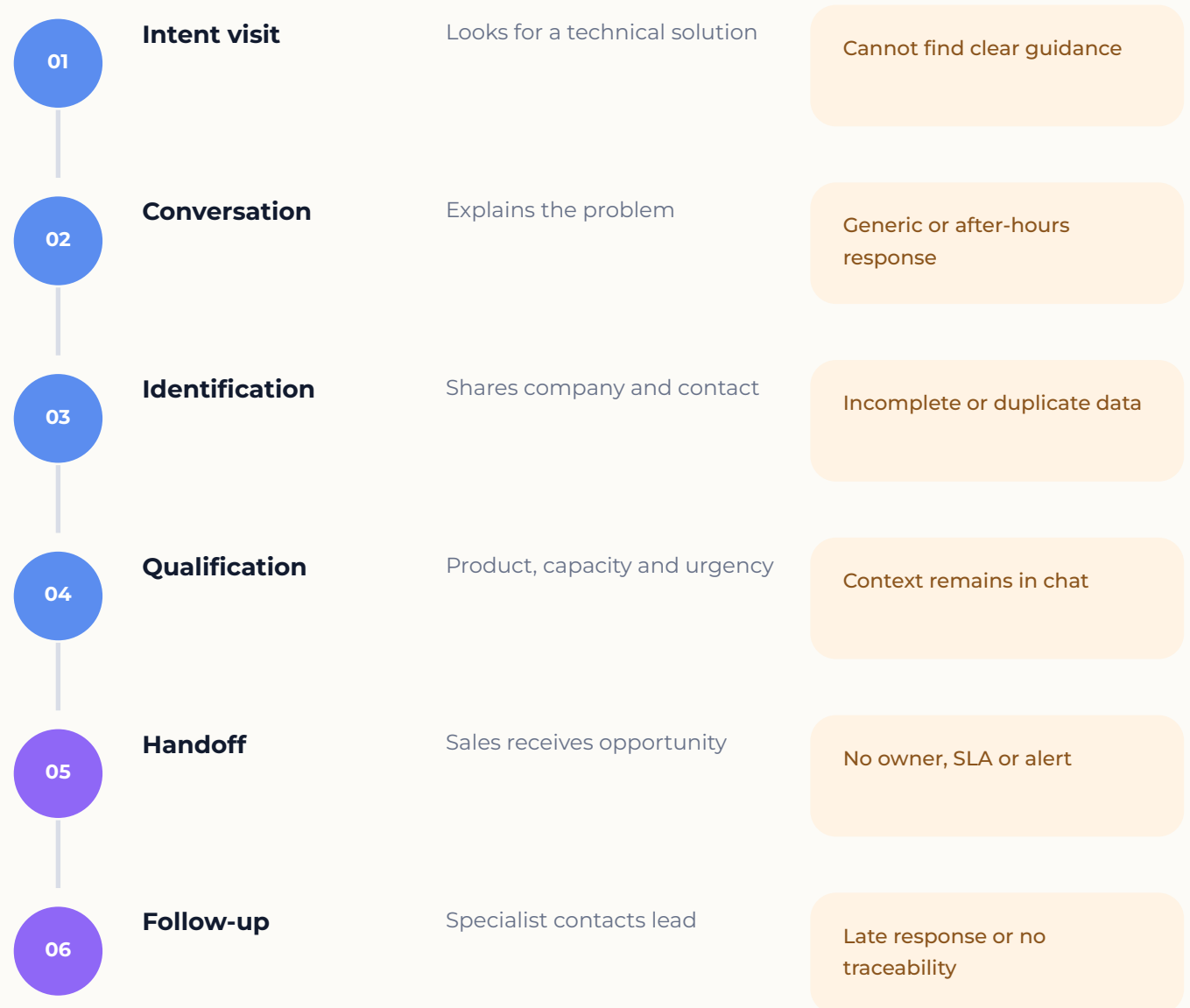
Recommendation

First measure six funnel events. Then build a bounded pilot that retrieves knowledge, qualifies, registers and hands context to sales.

03 · LEAKAGE MAP

Where a lead can disappear

Leakage is not limited to form abandonment. It also occurs when the company receives a contact but loses intent, urgency or continuity.



THE QUESTION THAT CHANGES THE CONVERSATION

Diagnostic question: how many technical-intent conversations fail to become an opportunity handled within the agreed time?

04 · INSTRUMENTATION

Measure before automating

The diagnosis defines a minimum event dictionary. Analytics receives technical identifiers and states—never the name, phone number or private conversation content.

EVENT	WHEN IT HAPPENS	PROPERTIES
conversation_started	A valid session begins	Channel · campaign · time
commercial_intent	Commercial intent is detected	Category · confidence
contact_captured	User authorizes contact	Anonymous ID · completeness
lead_qualified	Minimum criteria are complete	Product · urgency · size
crm_registered	A linked opportunity exists	CRM ID · source · date
sales_handoff	Sales receives context	Owner · SLA
first_human_response	First contact occurs	Minutes since handoff

QUALITY RULES

One definition per event

Server timestamp

Defined consent and retention

PII excluded from analytics

05 · FUNNEL EXAMPLE

Turn activity into a baseline

This scenario demonstrates the method. Values are illustrative and are replaced by observed data in the real diagnosis.

DEMONSTRATION SCENARIO · NOT A SIGMART RESULT

120 Conversations started**52** With commercial intent**31** Contact captured**24** Qualified lead**18** Handled within SLA**21**
intents without contact**7**
contacts not qualified**6**
leads outside SLA

FORMULA

$$\text{Stage leakage rate} = (\text{entries} - \text{valid exits}) \div \text{entries} \times 100$$

06 · ROOT CAUSE

Not every leak needs artificial intelligence

The diagnosis separates experience, data, process and knowledge problems. Solving the wrong cause only automates waste.

01

Experience

The interface asks too much, provides no guidance or fails on mobile.

[Simplify the journey and questions.](#)

02

Process

There is no owner, SLA or definition of a valid lead.

[Design ownership and rules.](#)

03

Data

Duplicate CRM, inconsistent fields or unknown source.

[Normalize schema and events.](#)

04

Knowledge

The inquiry needs technical context a form cannot capture.

[Evaluate RAG retrieval.](#)

05

Integration

The conversation ends without registration or alert.

[Automate handoff and traceability.](#)

DISCOVERY QUESTIONS

01

What must sales know before calling?

02

Who acts and within what time?

03

What can be answered from approved sources?

04

What is the fallback when the system does not know?

Choose the smallest tool that solves the problem

A RAG agent is useful when a conversation needs changing knowledge and controlled actions. For a simple journey, conventional automation may be better.

Option	Use it when	Avoid it when
Form	Criteria are few and predictable	The need requires guidance
Automation	The rule and next step are deterministic	Technical interpretation is required
FAQ chatbot	Answers are brief and stable	It must access history or act
RAG agent	It must retrieve sources, qualify and use tools	There is no reliable base or supervision

CONDITIONAL RECOMMENDATION

Build a RAG agent only when approved sources, a commercial owner, CRM integration, qualification criteria and a verifiable human handoff exist.

Approved sources

Accessible CRM

Owner and SLA

Human fallback

08 · WHAT RAG MEANS

Retrieved knowledge, not improvised memory

Retrieval-Augmented Generation combines search over authorized content with a contextual response. The agent retrieves before answering and preserves evidence of which source it used.



Less improvisation

Answers anchored in catalog, manuals and policies.

Updatable content

Sources change without retraining the model.

Complete handoff

Sales receives need, context, source and urgency.

Safe fallback

A specialist intervenes when evidence is insufficient.

RAG □ CHATBOT

RAG adds retrieved knowledge. An agent adds decisions and controlled tools to execute the next step.

09 · REFERENCE CASE

Laura turns conversation into operations

Laura is a commercial agent developed for Sigmart Group's boiler and steam systems division. Conversation is the interface; underneath is a system that retrieves, structures, records and activates.

LAURA

Commercial RAG agent · 24/7 operation

IMPLEMENTED CASE

Industry

Industrial equipment and services

Channel

Website and embeddable widget

Market

El Salvador and Central America

Scope

Conversational UX, AI and integrations

SYSTEM CAPABILITIES

- Retrieves technical information from a controlled base
- Looks up customers and previous interactions
- Identifies product, industry, size and urgency
- Creates or updates the CRM opportunity
- Notifies sales with a structured summary
- Sets expectations based on business hours

DESIGN BOUNDARY

Laura does not invent prices or make final technical decisions. When reliable evidence is unavailable, it connects the prospect with a specialist.

The important work happens behind the chat

Abbreviated example of Laura's designed behavior. Every response reduces uncertainty and every tool has a limited scope.

LAURA · LIVE AGENT

Prospect

We need to expand production. The current boiler no longer covers demand.

Laura

What approximate capacity do you need and what fuel do you use?

Prospect

Around 300 BHP, natural gas. We want to quote this month.

Laura

I found your company's history. I will confirm application, urgency and contact to prepare follow-up.

AGENT ACTIONS

knowledge.search

Queries approved technical information

customer.lookup

Retrieves commercial context

lead.qualify

Structures need and urgency

crm.upsert

Registers a linked opportunity

sales.notify

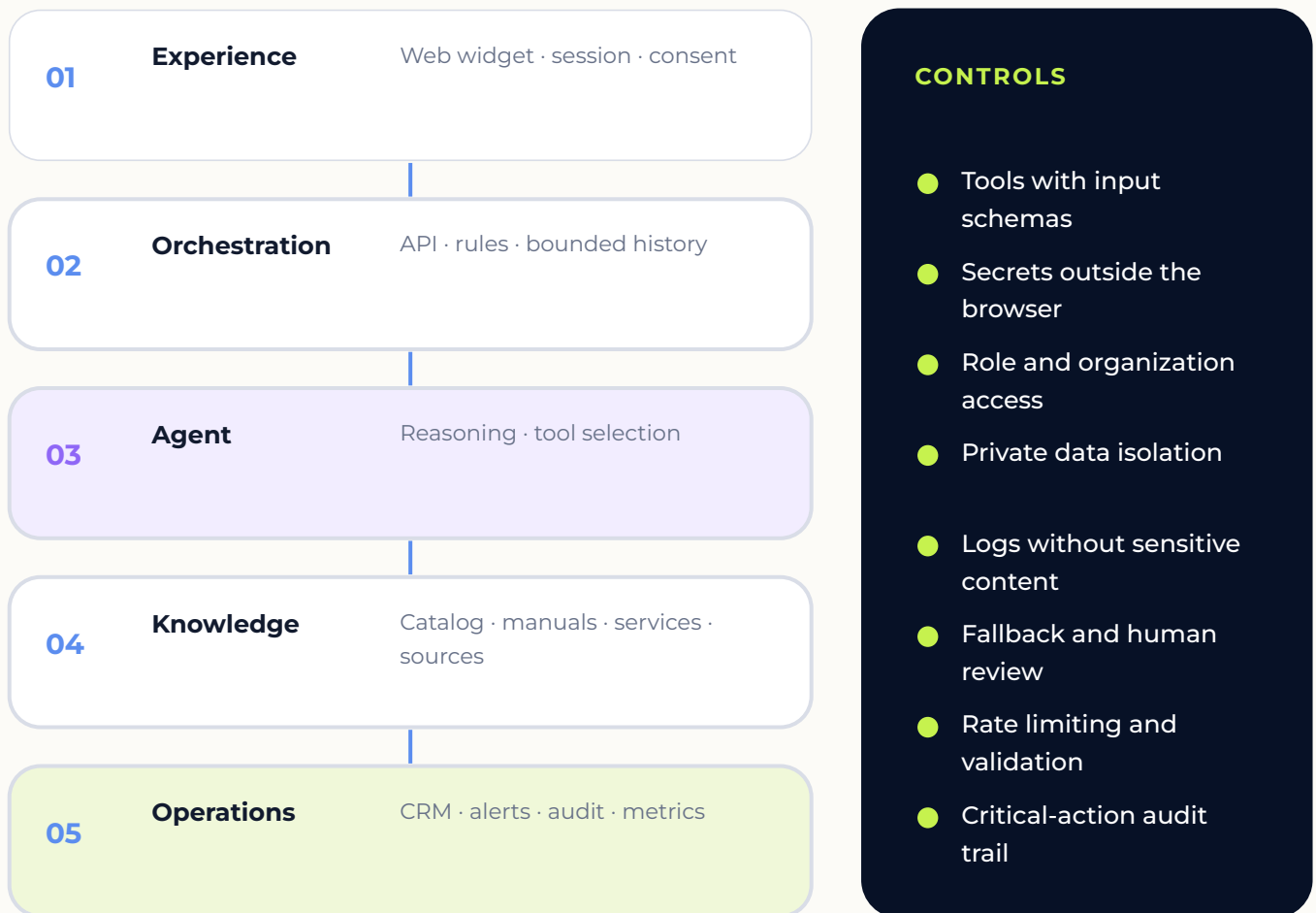
Delivers context to the owner

STRUCTURED HANDOFF

Sales receives: company · contact · product · capacity · fuel · urgency · summary · source

The model never receives the keys to the business

The agent decides which tool it needs; the backend validates the request and executes only authorized actions. Permissions are enforced by the server and database.



12 · IMPACT MODEL

Scenarios that can be audited

Value is calculated with visible variables. No additional sales or savings are attributed until the process is observed and a baseline is agreed.

Scenario	Recovered leads/mo	Work avoided	Hourly cost	Annual capacity
Conservative	10	18 min	\$12	\$360
Base	24	22 min	\$12	\$1,056
High	40	25 min	\$16	\$2,667

OPEN FORMULA

Annual capacity = handled leads × minutes avoided ÷ 60 × hourly cost × 12

METRICS TO VALIDATE

Lead conversion

CRM completeness

Time to first contact

Leads within SLA

Quote conversion

Specialist fallbacks

Responsible reading

Demonstration data. The real diagnosis replaces every variable with customer evidence.

13 · RECOMMENDED ROADMAP

A six-week pilot with clear exits

Every phase creates evidence to continue, adjust or stop. The objective is not to launch an agent quickly; it is to validate a safe commercial capability.



EXIT GATES

GO 01 · data and ownership

GO 02 · security and answers

GO 03 · measurable pilot

PILOT OUTCOME

Continue, adjust or stop with evidence—never scale only because the agent holds a good conversation.

14 • NEXT STEP

What is decided when the diagnosis ends

The company receives a concrete recommendation: which leak to address, with what solution, under what controls and how to prove it worked.

Build

A validated opportunity, sufficient data and an owner exist.

Prepare

The opportunity exists, but process or knowledge must be organized first.

Do not build

Volume, risk or return does not justify investment yet.

INCLUDED IN THE DIAGNOSIS

- Discovery and current-state map
- Baseline and prioritized leakage
- RAG suitability evaluation
- Architecture and controls
- Impact scenarios
- Roadmap and implementation range
- Executive document + delivery session

INVESTMENT

The diagnosis costs \$150. If you implement the project with OrbiLabs, the full payment is deducted from the agreed implementation cost.

Request diagnosis • orbilabs.cloud/#diagnostico