Quantifying the Impact of a Predictive AI Sales Assistant

A Pilot Study of BlueBird.AI in Home Health & Hospice

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The Problem

One of your most expensive growth engine is running at 60% capacity.

Sales teams spend up to **40% of their time** on non-selling administrative tasks, because traditional CRMs are built for management, not for them.

This creates a cascade of frustration and inefficiency.

The Sales Rep

"My CRM is a data-entry chore that takes time away from selling. It doesn't help me be better at my job."

The Sales Leader

"Garbage-in, garbage-out. I can't get reliable forecasts or proactively coach my team because the data is incomplete."

The Executive

"We made a significant investment for a 'single source of truth' we still don't have. What's the ROI?"

The Solution

Shift from a passive database to a proactive assistant.

We designed BlueBird.AI to solve the user's problems first. It's an AI assistant that **enhances selling skills** and **instills sales discipline** through intelligent automation.

An Empirical Test: How Does It Work In The Real World?

Design: Pre-post, single-group interventional study.

Participants: 445 sales representatives across 3 mid-sized home health & hospice agencies.

Timeline: 12 weeks total (4 weeks baseline data, 1 week training, 7 weeks intervention).

Intervention: Replaced traditional CRM with the BlueBird.AI Sales Assistant.

Key AI Functions Tested:

- AI-Powered Daily Scheduling & Routing
- Automated Admin (Expenses, Mileage)
- Intelligent Meeting Prep (Data & Talking Points)

Finding 1: Sales Discipline

By automating scheduling and planning, sales discipline soared.

3x

Increase in Logged Sales Calls

(Within the first 30 days)

Finding 2: Productivity

AI automated low-value work, giving reps more time to sell

50%

Reduction in Admin Time

(Meeting prep reduced from 30+ mins to <5 mins)

Finding 3: Bottom-Line Growth

More disciplined, productive activity leads directly to revenue.

12.5%

Growth in Referral Volume

(Within 45 Days)

7.5%

Boost in Admissions

(Within 60 Days)

The Secret to Success

Why did this work when CRMs fail?

We solved for the user.

When a tool makes a person's job fundamentally easier and more effective, they use it. This drives the data fidelity everyone else in the organization needs.

98% **Voluntary Daily Active Use**

Key Takeaways

1. User-Centricity is Key: The ROI of any sales technology is a direct function of its adoption by the end-user.

2. AI's Role is Discipline: The greatest value of AI is not just saving time, but in automating best practices to enforce sales discipline at scale.

3. From Admin to Revenue: Reclaimed administrative time can and should be converted directly into measurable organic growth.

How to Evaluate AI for Your Agency

Not all AI is created equal. Focus on solutions that answer "Yes" to these three questions:

1. Does it make the end-user's daily job quicker and better? (The User Experience Test)
2. Does it build the discipline required to be successful? (The Sales Discipline Test)
3. Is its impact clearly measurable in weeks, not years? (The ROI Test)

Thank You & Q&A