Your logo × [Client]

Onboarding · [Day, date]

Welcome to Alori, [Client].

Moving your [support] from [old tool] with nothing lost, nothing paused, and Nora taking the routine questions.

With [names on the client side]

Presented by [your name], [your agency]

AGENDA · 60 MINUTES

Today's hour

01	Our goals for today	5 min
02	[Daily user] shows us how they work in [old tool]	10 min
03	How a request flows in Alori	5 min
04	How [daily user] answers a request	10 min
05	How Nora answers a request	15 min
06	Your import and setup	10 min
07	Next steps	5 min

What we'll do today

01

Walk through [daily user]'s day

The inbox, answering, and a customer's whole history.

02

Review your saved replies

Your most-used ones, and how they come over.

03

Show how approvals work

Nora drafts, [daily user] checks and sends.

04

[Daily user] decides

Is it easy enough to adopt now? Their call sets the timing.

Our promise: nothing changes for your customers while you decide.

[Daily user], show us your [old tool]

You drive, we listen. A normal day, the way you really do it.

01

Where requests come in

Email, chat, phone, social messages: which is busiest, and which phone system takes your calls?

02

Your go-to replies

The ones you send every day, and the ones you never use.

03

How you tag

When you add tags, which ones matter, and who reads them.

04

What slows you down

The clicks and copy-pastes you'd love to skip.

03

How a request flows in Alori

From the moment a customer writes to the moment it's solved.

Every request takes one of two paths

Email

Website chat

Phone

Text (SMS)

Social messages

→

Step 1

A customer writes

Every channel lands in one inbox.

→

Step 2

Nora reads it

Your help center, saved replies and, for a verified customer, their orders and billing.

→

Path A · Routine

Nora answers and closes it

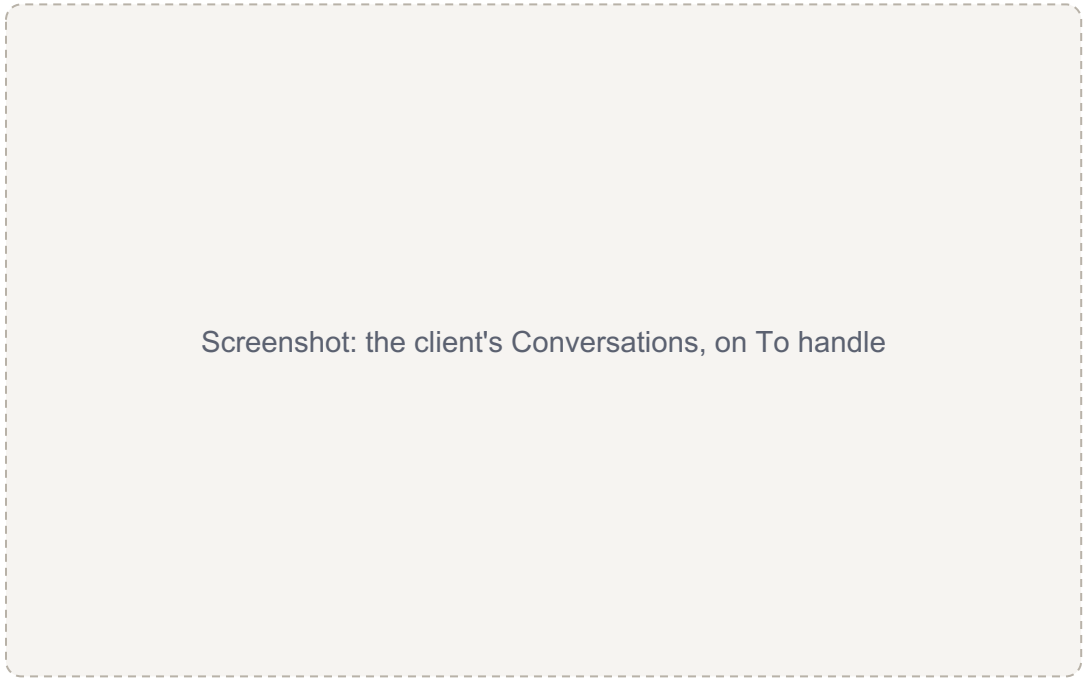
Marked “Solved by Nora”.

Path B · Needs a person

Nora hands it to [daily user]

It lands in To handle, with why and a drafted reply.

Your inbox, sorted by what needs you



To handle
Waiting on your team

Waiting
On the customer

Snoozed
Back when you said

Closed
Done

Filters
Channel, owner, Nora

04

How [daily user] answers a request

Everything they need on one screen, without switching tabs.

Everything about the customer on one screen

Screenshot: one conversation, with the customer panel open

One thread
Email, chat and calls

Every past request
Imported from [old tool]

Nora on it
Take over in one click

A drafted reply
Edit it, then send

Your replies
Your old macros, filled in

Answering a request yourself

01

From your own email

Connect it once. Answers leave from your own address.

02

Pick a reply

Your old macros, one click above the reply box.

03

Add tags

More actions › Tags, or let a reply add them.

04

Close or wait

Close it, or set it to wait until they reply.

05

Merge

Join two requests from the same customer.

06

Take over from Nora

One click when she's on a request.

05

How Nora answers a request

What she answers on her own, what she hands to [daily user], and how you can check her work.

Everything about Nora, on one page

Screenshot: Nora's channels and rules

Where and how she answers

Each channel, and her rules in plain words.

Screenshot: what Nora knows

What she knows

[N] help articles and [N] facts, today.

Screenshot: Nora's connected tools

What she can look up

[Shopify and Stripe], read-only.

You choose, and you can change it any day

When you're ready

Nora first

She answers every new message right away and hands off anything on your list.

Backup

Team first

Nora answers only when nobody on the team has replied within 2 minutes.

Where we start

Nora drafts

Your team answers everything. Nora writes a suggested reply for each.

Good to know

When someone on the team replies in a chat, Nora steps back from that chat until someone presses “Let Nora answer”.

Approvals: Nora drafts, [daily user] decides

Step 1

Nora drafts the reply

From your help center, Company memory and the customer's orders.

Step 2

[Daily user] checks it

Edits the words, sees the sources and the reason.

Step 3

[Daily user] sends it

A thumbs up or down teaches Nora for next time.

Set this way today

Every channel is on “Nora drafts a reply for your team”. [Daily user] lets Nora answer alone, channel by channel, only when they're ready.

Routine for Nora, judgment calls for your team

Nora answers on her own

- Where is my order, and what's its tracking?
- Which plan am I on, and when does it renew?
- Did my payment go through? Can I get my invoice?
- How-to questions your help center answers

Straight to your team

- Refunds and returns
- Cancellations
- Damaged or missing items
- An unhappy customer
- Anything Nora isn't sure about

A proposal: we set this list together today, in plain words in Nora's instructions.

Order and billing answers come from your real data

01 **The customer is verified**

Signed in on your site, or an email that passes the sender check.

02 **Nora reads [Shopify and Stripe] live**

Every order, plus subscriptions, invoices and payments.

03 **She answers with the real details**

Order number, status, plan, renewal date.

04 **Every lookup is logged**

And shown to your team in any hand-off.

Read-only, on purpose

Nora never changes an order, a subscription or a charge.

Refunds and cancellations stay with your team, with everything Nora found already in the request.

Every answer shows its work

Screenshot: “Why handed off” on a real hand-off

Why handed off
The reason, the rule she followed, the facts she used

Sources
Each reply says where it came from

Solved by Nora
Requests she closed carry the label

Fix this answer
Her next answer uses the fix

The bell rings
A hand-off alerts whoever follows the customer

06

Your import and setup

What came over from [old tool], and what's left to set up.

What's connected, and what's left

[Shopify]	Your full order history	Connected
[Stripe]	Subscriptions, invoices and payments, read live	Connected
[Old tool] history	Customers, requests, help center, internal articles	Imported
[Daily user]'s account	Accept the invite and set a password	To do
[Daily user]'s email	Connect it, so replies leave from their address	To do
Tags	Your list is in hand, loading into Alori	In progress
Saved replies	We have the titles, we need the full text	Waiting on you

What came over from [old tool]

In [old tool]	Now in Alori
Customers and organizations	Customers and companies, with tags, notes and fields
Requests, archived ones too	Conversations, every reply and file, by channel
Private comments	Team-only notes on the conversation
Help center	Your help center; old links redirect
Internal articles	Company memory, team-only
Macros	Replies, once we have their full text

Stays behind [Triggers, automations, SLAs and views]. Tell us the ones you rely on and we rebuild them in Alori.

Your macros become replies

01 **You send us the full text**

Each macro's title and words.

02 **We load them into Replies**

One file, all at once.

03 **[Daily user] sends them in one click**

Above the reply box, the customer's name filled in.

Good to know

A reply can add tags when it's sent.

Like “[first response recorded]” on your first-reply macro, so nobody tags by hand.

Your tags, set as you work

[tag] · [N] [tag] · [N] [tag] · [N] [tag] · [N] [tag] · [N] [tag] · [N] [N] tags in all

How it works

- We load your [N] tags, once
- [Daily user] tags from More actions › Tags
- A reply can add tags by itself

To answer today

- Which reports read your tags?
- Which tags does [old tool] add by itself?
- Who checks the numbers in week 1?

07

Next steps

A live test, the path to go-live, and who does what.

Three requests, start to finish

Request 1

“[Where is my order?]”

Nora finds the order and answers with its status and tracking.

Solved by Nora

Request 2

“[When does my plan renew?]”

Nora reads billing and gives the plan and the renewal date.

Solved by Nora

Request 3

“[It arrived damaged. I want a refund.]”

Nora hands it off with why, the order she found and a drafted reply. [Daily user] finishes it.

Handed to [daily user]

Heads-up: once your email is connected, a reply sent from Alori reaches the real customer.

From today to go-live, at [daily user]'s pace

Today

Demo and first look

[Daily user]'s workflow, your replies, and how approvals work.

[Day, time]

Weekly touchpoint

Same time every week: what worked, what to fix, what's next.

Next · Approvals

[Daily user] approves Nora's drafts

Nora drafts, [daily user] checks and sends, with [old tool] still running.

Their call · Go live

Switch when [daily user] says go

Timed around your busy season, once your reports are covered.

We're in your corner

01

One shared channel

Questions, fixes and changes to Nora, answered fast, in one place.

02

Eyes on day 1

We read every Nora reply and hand-off on the first live requests.

03

Changes in plain words

Nora's rules are sentences. Tell us, or change them yourself.

Your contacts [Your name, role] · [Teammate, role] [your email]

Who does what next

[Manager]

- Send each macro's full text
- Tell us how each tag gets added
- Tell us which phone system takes your calls

[Daily user]

- Accept the invite, set a password
- Connect your email
- Try Nora and rate her answers
- List the [old tool] rules you rely on

[Your agency]

- Load your tags and replies
- Set Nora's rules with [daily user]
- Book the weekly touchpoint, [day, time]

Thank you, [names].