



The B2B Marketer's guide to
**CHATBOTS &
CONVERSATIONAL
MARKETING**





INDEX

Introduction	02
The Buying Process and Chatbots in the Digital World	03
Introducing Conversational Marketing	05
Chatbots Vs Online Chat	07
The Benefits of Chatbots	10
Getting Started - Defining Your Chatbot Objectives	12
Choosing Your Chatbot Platform	14
Plan Your Chatbot Operations	16
Introducing Chatbot Playbooks	18
Building Your Playbook Roadmap	19
What To Consider When Building a Chatbot Playbook	21
Chatbots: The New Way of Selling	22

Marketing is evolving fast...

New SAAS technologies, capabilities and opportunities are growing every day and B2B businesses are quickly finding ways to make the most of them. It's an exciting time to be involved in the industry!

Looking across this vast landscape of opportunity, **one area in particular stands out from the rest - chatbots.**

Offering the opportunity to communicate with prospects at scale using simple AI, chatbots have the power to revolutionise the way we engage with our audience, develop leads and generate revenue.

So, with this amazing opportunity in mind, we've put together an essential resource to help you see and unlock the potential chatbots present, now and into the future. Enjoy!

57%

OF THE PURCHASE DECISION
IS COMPLETE
BEFORE A CUSTOMER
EVEN CALLS

The Buying Process and Chatbots in the Digital World

The world is changing, and so are your prospects. Everything from how they live their everyday lives, to how they communicate is in an almost constant state of flux.

With so much transition, it can be hard to keep up. Yet this is the challenge those of us tasked with generating leads face every single day. We must adapt or we will quickly fall behind into obscurity. **This is particularly true in the world of sales.**

For your prospects, deciding on a new product or service for their business can be a dizzying task. They have to analyse all the options, compare pricing, and then trust that their decision is right. **It's a time-consuming and complicated process.**

To make matters worse, many are often left with questions they can't find answers to. This is particularly problematic when you consider **the majority of customers will not reach out to a supplier until they're more than halfway through the purchase decision** (Forbes) .

See the issue?

Fortunately, there are ways to tackle this rising challenge, and chatbots can play a critical role. As consumers, we're used to online experiences that make our purchase decisions easier. Instant customer support in Facebook Messenger, for example, or augmented reality to 'try-on' clothes at ASOS. We expect a smooth, instant and personalised experience tailored to our needs. So why shouldn't this experience extend to the B2B buying process too?

With a chatbot, you can not only offer instantaneous communication 24/7, but also actively nurture and capture lead data without human involvement.

Read on and discover the power of chatbots.



80%

**OF BUSINESSES WILL HAVE
SOME SORT OF CHATBOT
AUTOMATION BY 2020**

(Business Insider)

Introducing Conversational Marketing

Whether it's Whatsapp, LinkedIn, Facebook or Snapchat, one-to-one messaging has grown exponentially over the last 5-10 years. Digital conversations happen in more places than ever before and for most people they are now a regular daily occurrence. Conversational marketing taps into this trend and offers prospects one-to-one communication via highly targeted, real-time messaging.

More than half of consumers are interested in interacting with a business through messaging apps. (ubisend)

With conversational marketing, you can offer a relatable human buying experience, allowing for faster acquisition, nurture and sales cycles. By giving prospects the power to engage where and when they want, wait times become a thing of the past and the buying process becomes theirs to control and progress through at their own pace, without any blockers.



Offering such significant benefits, it's clear conversational marketing has the edge over more traditional sales tactics by giving the power to the prospect. However, many companies have concerns around the conversational marketing approach due to resource restrictions. Most just don't have the manpower to conduct one-to-one conversations at scale, but this is where chatbots come in to support and ensure your human resources are only focused on the prospects closest to purchase.

This guide will explain how you can use chatbot technology to enhance your marketing and unlock the opportunities it presents.

2021

BY THE YEAR 2021, 50% OF ENTERPRISE COMPANIES WILL SPEND MORE ON BOTS AND CHATBOT CREATION THAN THEY WILL ON TRADITIONAL MOBILE APP DEVELOPMENT

(Gartner)

46%

OF CONSUMERS WOULD RATHER COMMUNICATE WITH A BUSINESS THROUGH A MESSAGING APP THAN EMAIL

(ubisend)

Chatbots Vs Online Chat

In a world of unlimited resources, online chat would be ideal. You'd have every sales lead in the pipeline engaged in a two-way conversation with a team member, driving each through the journey on the way to sale. Of course in reality, this is far from possible. **Most companies lack the resources necessary to meet the scale required and so they turn to chatbots.**

Chatbots fill the gaps and unlock the opportunity to automate conversations using decision-tree algorithms and natural language processing. They allow companies to converse and guide their prospects without the need for human involvement.

Typically, chat bots are used early-on in the discussion and help prospects find what they need as they progress through the funnel. This allows your sales team to focus on the prospects who have the highest chance of converting.

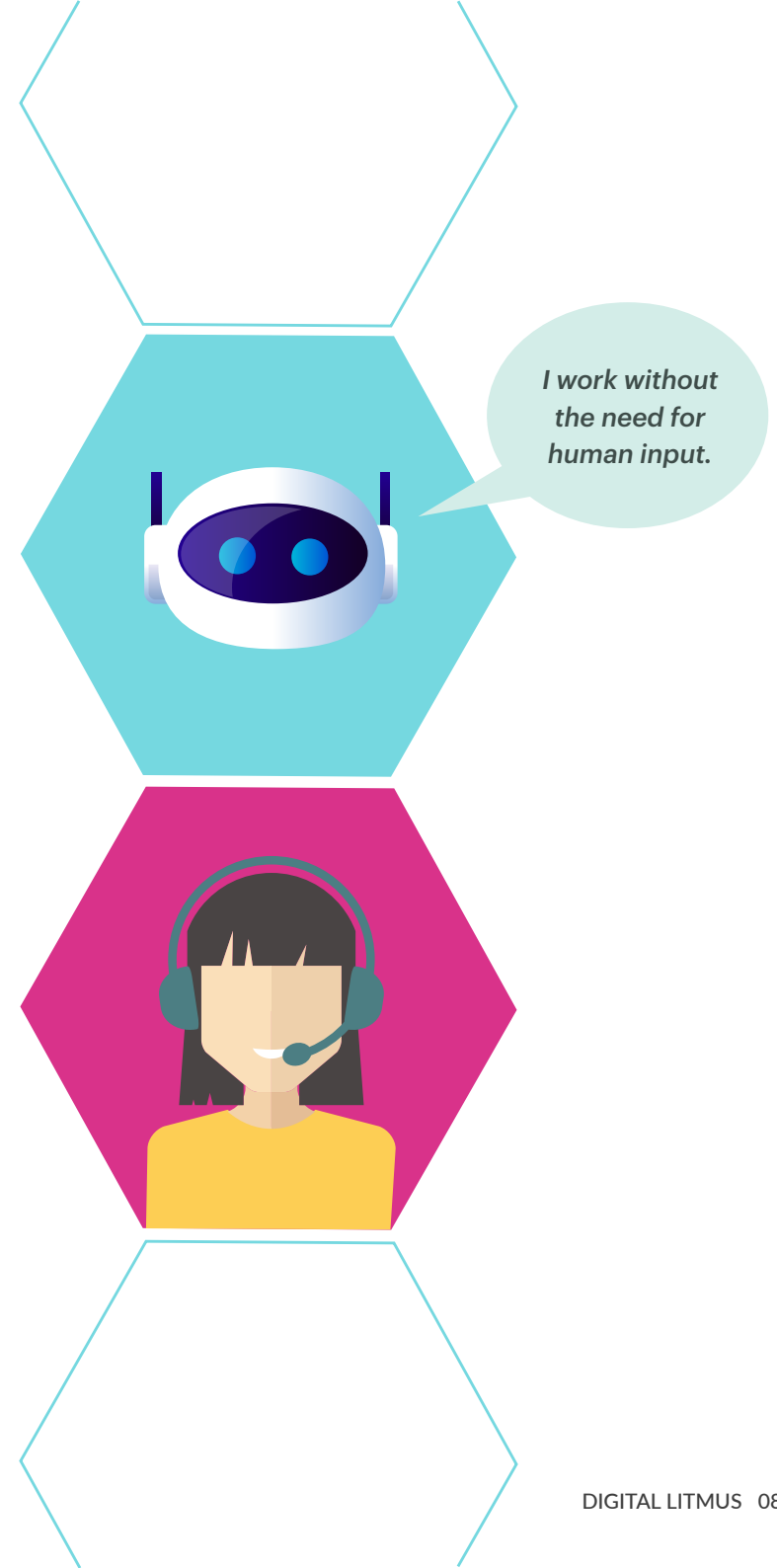


What is the difference between live chat and a chatbot?

Live chat and chatbots are often confused with one another and at times even used interchangeably, this is grossly misleading as they are both completely separate communication channels.

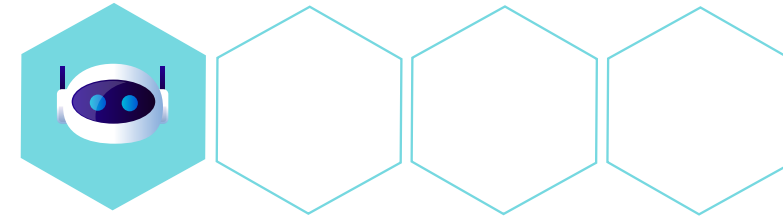
Live chat is manned by a human operator and involves one-to-one communication between the host individual and the visitor. Communication is manual, and could be likened to Facebook Messenger or Whatsapp.

A chatbot is automated and involves one-to-one communication between an algorithm based decision-tree and the visitor. Communication is automated and progresses based on the choices and inputs of the visitor. There is no human involvement.

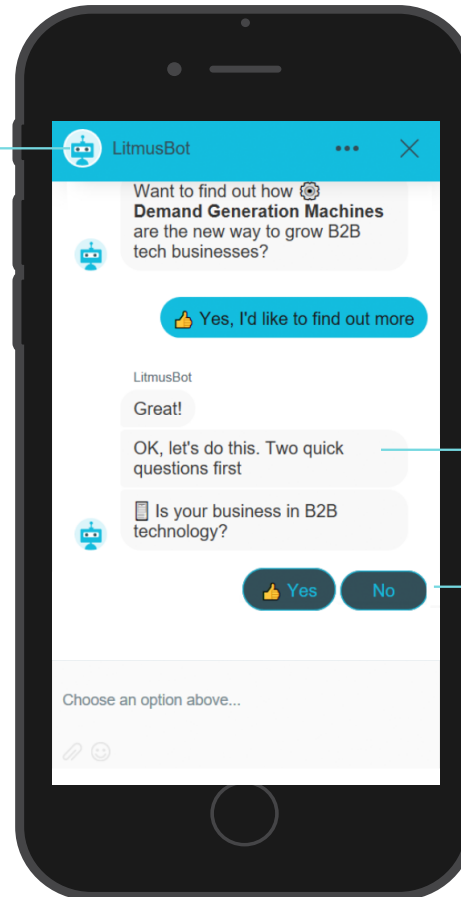


The Anatomy of a Basic chatbot

The image below showcases the anatomy of a basic chatbot and how the channel differs from live chat.



Chatbots are 'unmanned' and operated by simple AI, using decision tree logic to assist, guide and nurture prospects.



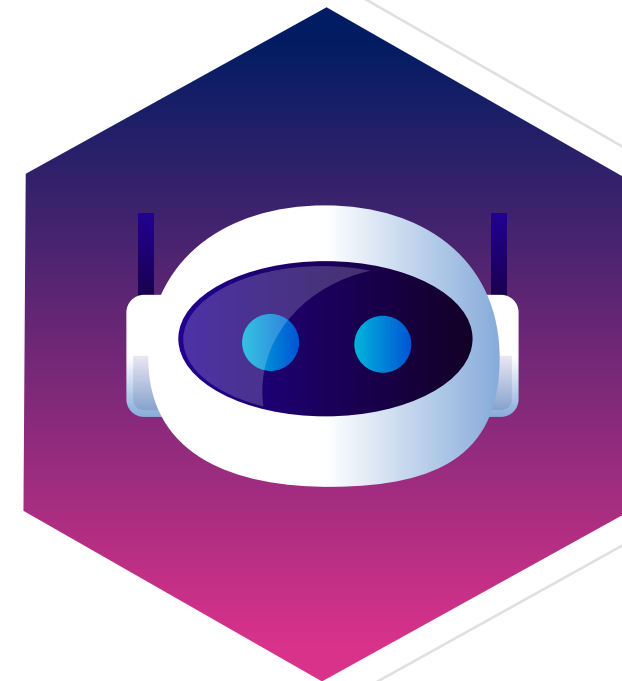
Chatbots engage with prospects using pre-defined conversational language.

Prospects engage with chatbots via multiple choice questions to progress through the decision tree. Although this is typical only for the simplest of chatbots, as most allow users to type responses and questions too.

The Benefits of Chatbots

With the power of chatbots at your fingertips, you can significantly reduce the human resources required to deliver high-quality customer support and nurturing throughout the funnel. This removes the challenge of scaling enquiry management and ensures genuine sales leads get the human attention they deserve. Your chatbot is only limited by the upper cap on your platform subscription, so **in theory, you could service millions of customers simultaneously, if required.**

Chatbots empower you to do more, with less. It really is that simple, and their value doesn't stop there. Going beyond basic lead nurturing, chatbots can also qualify leads and create detailed sales leads through data capture, **generating a high-quality pipeline for your teams to evaluate and engage.**



When integrated into your internal processes and CRM systems (Trello, Hubspot, Slack, Salesforce and many more are supported), **your chatbot can effectively develop qualified leads**, helping prospects travel through the funnel. In fact, with the right setup your chatbot can even schedule meetings with prospects, book the room, send reminders and cancel if necessary.

Offering instant response times, chatbots also ensure your prospects are never left waiting and are always on the move, **there are no out-of-office hours and no risk of traffic bottlenecks**. This helps limit bounce rates and maximises the chance of prospects converting. Combine this convenience with web users preference for text and younger generations dissatisfaction with answering the telephone and you have a fantastic medium with which to engage and nurture your prospects. Instant messaging is a fundamental part of modern life, so why not take full advantage?

If you're still not convinced, then consider the opportunities chatbots present for your content distribution strategy. Programmed with the right triggers, chatbots offer a fantastic opportunity to recommend and promote your premium content in a natural and inviting way. **With so much to offer, chatbots really can fundamentally enhance the way you generate leads.**



57%

**OF CONSUMERS ARE
INTERESTED IN CHATBOTS
FOR THEIR INSTANTANEITY**
(Hubspot)



*I work with your
CRM to qualify
leads.*

Getting Started

Defining Your Chatbot Objectives

As a tool for amazing conversations, chatbots have the power to engage prospects and drive action, but, to deliver the very best value, they must be designed with your sales objectives in mind. Knowing the direction you want to take the conversation is critical to making the logic flow and feel natural. In addition, it helps determine what success looks like and creates the opportunity to measure performance, meaning your chatbot can be tweaked regularly to maximise its contribution to your objectives.

Of course, setting objectives is all well and good, but what does aligning them to a chatbot actually look like? Here are a few examples...

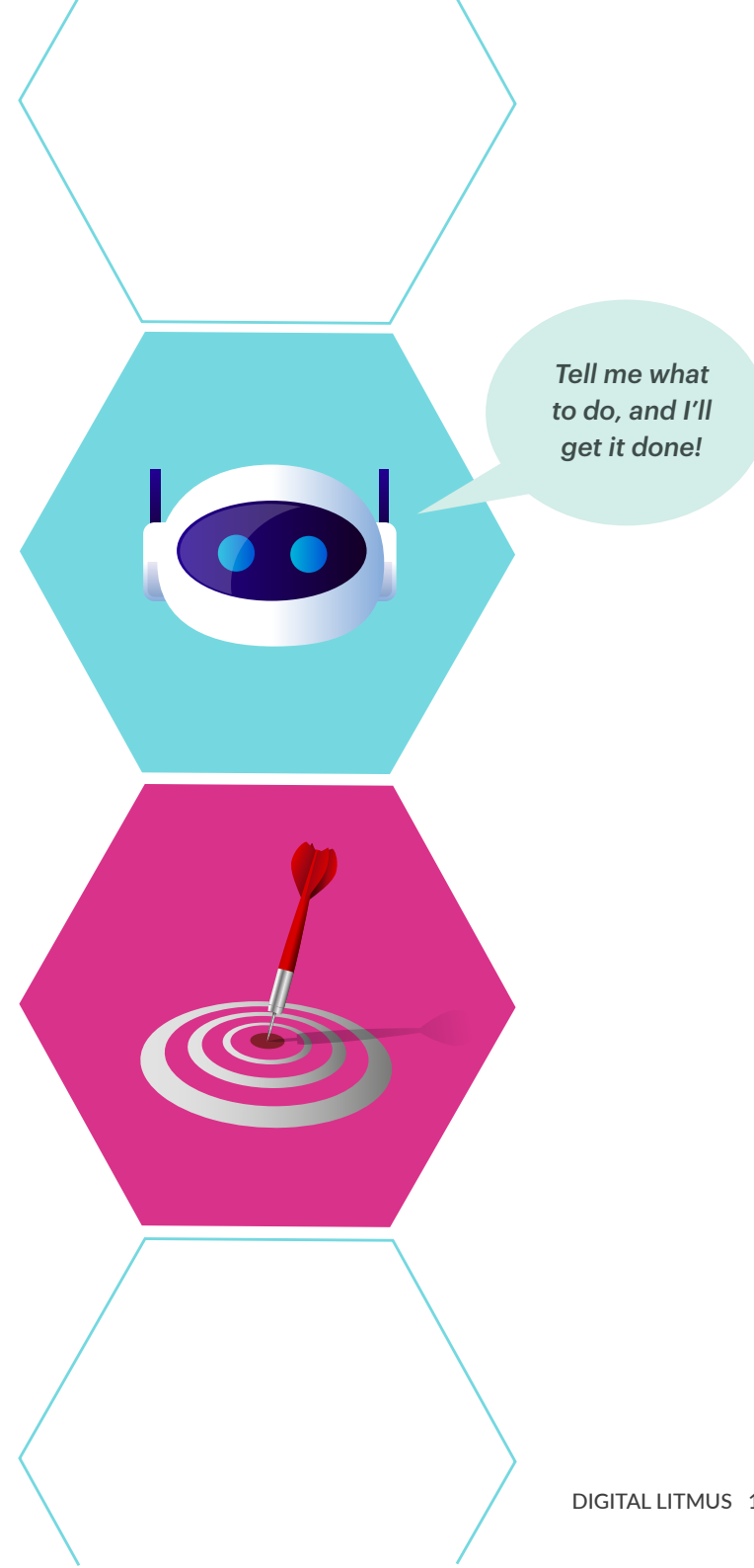
- Book more initial sales meetings
- Convert a higher percentage of the pipeline
- Collect more leads at the top of the funnel
- Collect more customer data in the CRM



Each of these objectives will dictate how the chatbot operates, communicates and engages with your prospects, so it's critical you know what you want to achieve, before you build your chatbot playbook. For maximum value, **these objectives should be easy to measure and have a distinct time limit** so success/failure can be iterated upon moving into the future.

It's critical you know what you want to achieve before you build your chatbot

Whether your chatbot is designed to drive engagement, conversions or sales leads, it needs to have clear objectives guiding its design, build and optimisation. This ensures its not only effective, but measurable and accountable too.



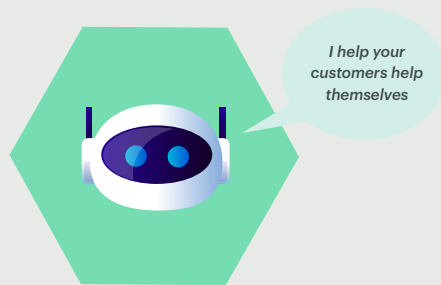
Choosing Your Chatbot Platform

Like any new addition to your marketing tech stack, the platform you choose will largely depend on what you currently have, your resources, and your objectives. **In the world of chatbots, you have two realistic options, either building your own platform (not advised) or buying an off-the-shelf solution.** Unless you have extremely niche requirements (and a BIG budget), off-the-shelf solutions should be able to meet (and exceed) all of your chatbot needs.

These off-the-shelf solutions typically fall into two sub-categories:

- **Support-focused Chatbots**
- **Sales-focused Chatbots**



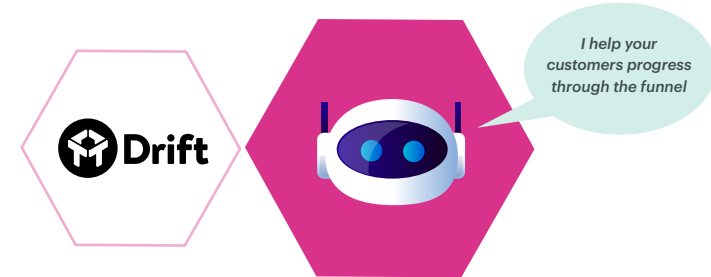


Support-Focused Chatbots

As it says on the tin, a support-focused chatbot is designed to provide your prospects and customers with support. **Its primary aim is to help them, help themselves**, whether this is in the form of finding the right information, navigating to the right point of contact or just helping them make the right decision.

A support-focused chatbot is not typically designed to nurture prospects or drive a sale, but to help those who have already purchased.

This is particularly useful for SAAS organisations. (although as one of their first UK partners, we may be a little biased).



Sales-focused Chatbots

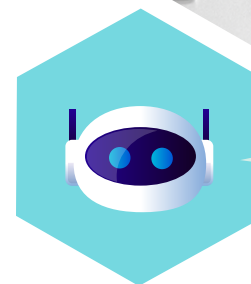
A sales-focused chatbot is designed to provide prospects with all the information they need to make a purchase decision, it's primary objective is to develop leads through data capture and nurturing. These chatbots help educate prospects around offerings and act as a navigational tool, **designed to accelerate their journey through the funnel.**

In our experience, the Drift platform is the best option for organizations looking to adopt chatbot marketing (although as one of their first UK partners, we would say that). Their market-leading chatbot is built on simplicity and can be setup and running within 15 minutes. Drift offers everything a beginner in chatbot marketing could need, without overcomplicating the process.

Plan Your Chatbot Operations

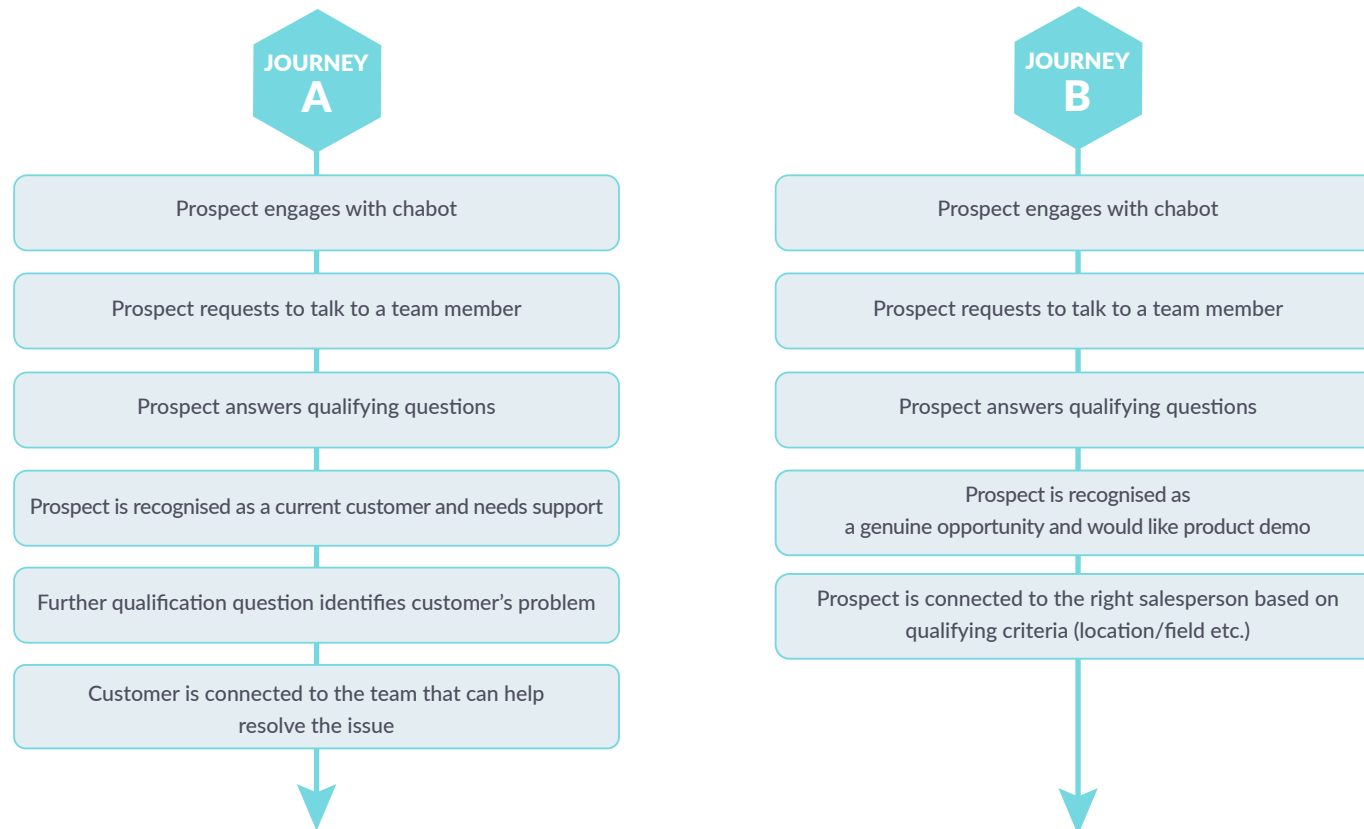
When it comes to building a chatbot, your prospects should be at the heart of your strategy. How you communicate, key conversation logic and functionality will all change based on the type of person you're expecting to engage and their location in the sales funnel. **Everything from your initial welcome greeting to the data capture process will be tailored to your target's preferences and circumstances**, so the more you know about them, the more effective your chatbot should be.

With this in mind, it's worth consulting with your customer support team to understand the common questions you can prepare answers for in your chatbot conversations. In the event your chatbot is capturing prospects for multiple sales teams, it's important to discuss the qualifying questions in advance to avoid Sales receiving leads of insufficient quality. **Working with your Sales teams becomes even more critical** when your chatbots lead into live chat, different prospects will likely require different team members to solve their challenge or need.



I can qualify your prospects before they engage with live chat.

For example, a **customer looking for product support is likely to need a different team member compared to a lead looking for a product demo**. One requires a product expert, the other requires a salesperson. To maximise customer satisfaction, it's critical this distinction is recognised and acknowledged. This distinction is showcased in the journey diagram below.



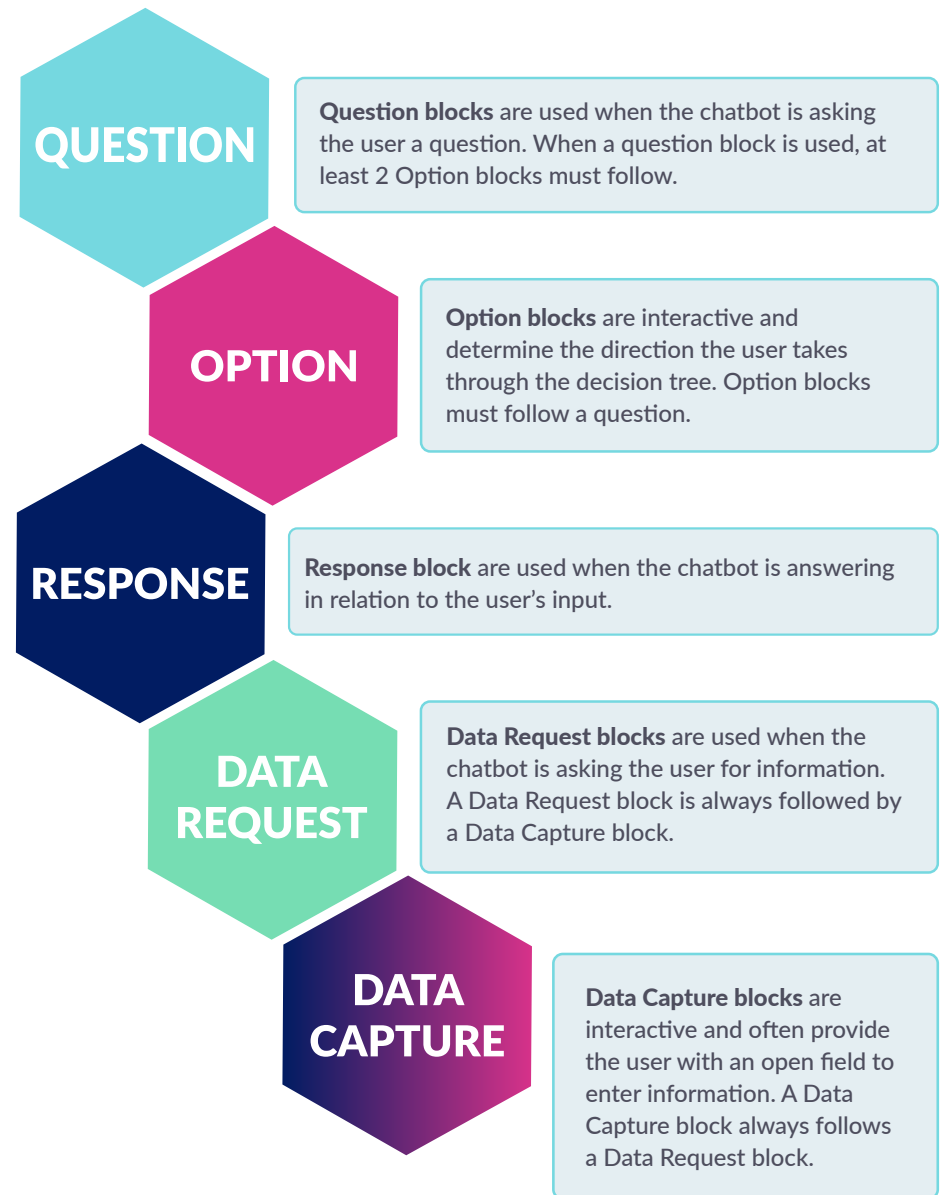
Beyond the functions and processes of the chatbot, you also need to consider ownership and responsibilities. Your team members will be busy with other activities, so it's important to lay out what is expected of them and when they're expected to act on notifications. E.g. at inconvenient times.

Introducing Chatbot Playbooks

Once you've decided what you want your chatbot to achieve, you need to start building out the logic, tone and copy. This is where the chatbot playbook comes in. **A chatbot playbook is a decision tree that determines the behind-the-scenes logic** dictating what your prospects see, the options they can engage with and how the chatbot responds.

Typically these playbooks consist of a few key components, each of which determine the action of the chatbot. Here are the components we use for playbook planning.

THE COMPONENTS OF A CHATBOT PLAYBOOK



Building Your Playbook Roadmap

Chatbots offer endless possibilities. With so much potential, it can be easy to get lost amongst the options and functionalities, so it makes sense to start small and build over time.

It's important you get the basics right before expanding as it will lay the foundation for your future success. Trying to do too much, too fast, too soon, can often lead to the whole system falling down, so it's best to start with just three or four playbooks for your most important pages. **A landing page encouraging prospects to download a piece of content or to book a demo is often a great place to begin.**

Typically you'll want different playbooks to appear on different parts of your website. The best chatbots are built with the page, prospect, objective and funnel in mind; the more specific your chatbot playbook is in the build phase, the greater the value it can deliver.

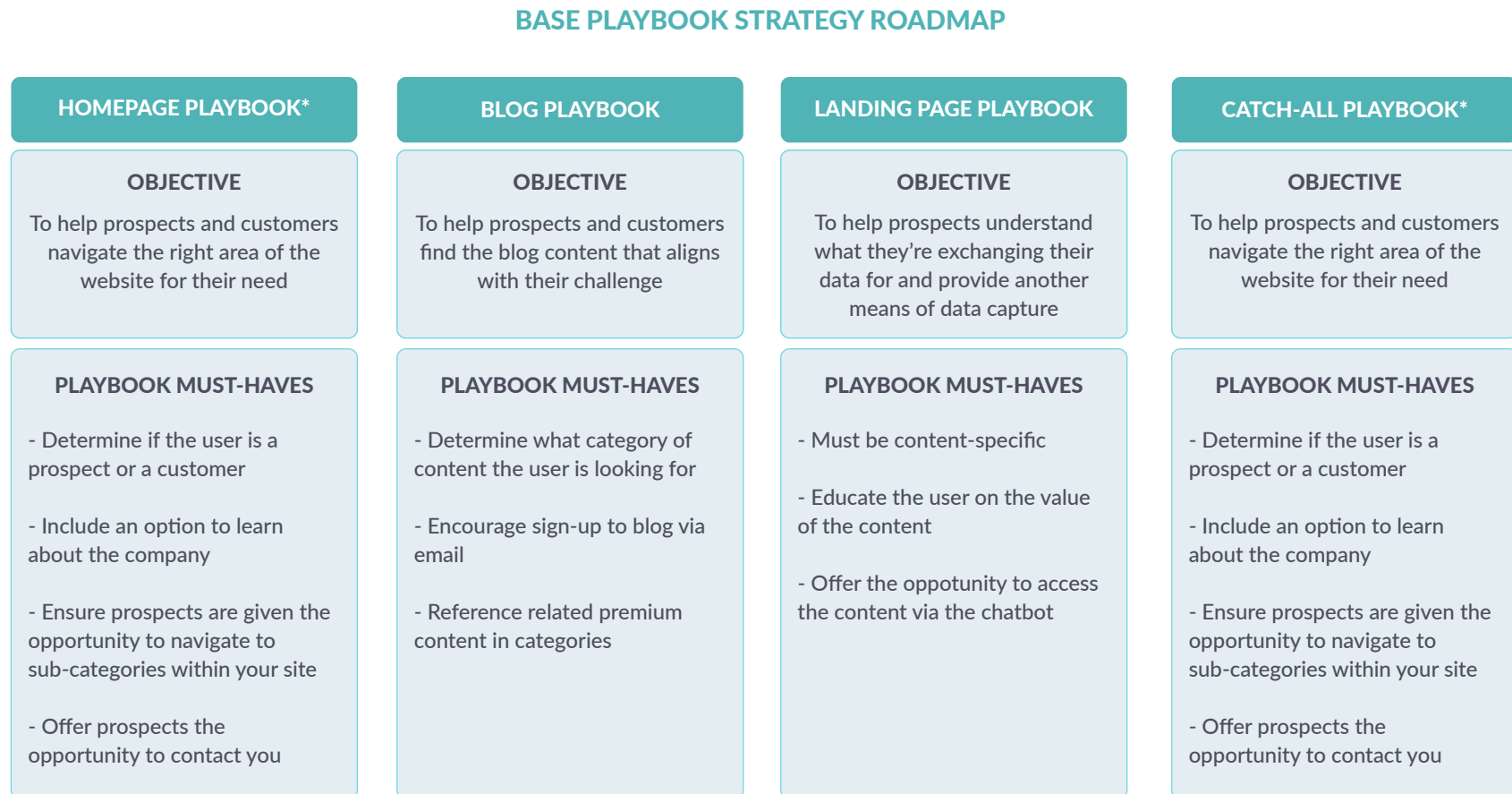
A chatbot on your blog page for instance, can encourage visitors to subscribe to your email newsletter. Another on your pricing page can be built to specifically answer frequently asked questions and provide a gateway to a sales rep. **Each chatbot playbook is designed to enhance the page on which it lives.**

Finally, to cover your bases and ensure you don't require a chatbot for every page on your website, a 'Catch All' playbook is typically advised. This chatbot will appear on all pages where there is no purpose-built alternative and is designed to help the prospect find the information, support, or contact they're looking for.



Can I help you?

The image below showcases a very basic example of a playbook roadmap.



The best playbooks feel personal to each prospect. Get the right messaging and logic, and you'll see increased engagement, higher conversions and happier customers. But to achieve this, you need to understand the context behind each customer's visit; knowing the purpose of their presence is critical to effectively meeting their needs.

What to consider When Building a Chatbot Playbook

When it comes to building a chatbot playbook, there are several key questions you need to consider to determine your messaging and infrastructure priorities. The framework below has been designed to help you prioritise and focus on the critical questions that really matter to your playbook build.

1

What?

What are your website visitors looking at now?
What content are they engaging with?

2

Who?

Who are the visitors to your site?

3

Where?

Where have they come from, was it a nurture campaign, an email or an ad that brought them to your site?

4

Why?

Why are they engaging with your site now? Do they need specific information or help? Do they want to speak to sales or book a demo?

5

When?

A trick question! Now is always the right time to engage with a prospect. Right when they are showing intent or interest.

Using these questions as a guide, you should be able to build a purpose-built playbook designed to meet the needs of your prospects based on their personal circumstances, maximising value and impact.

Chatbots: The New Way Of Selling

Chatbots revive the art of conversation for the digital era and unlock a new way for businesses to generate sales.

A well-implemented chatbot will engage, qualify and convert your prospects with little-to-no extra manpower required - and with a very short time-to-value, your chatbot could start paying you back within hours of going live.

By automating manual sales processes, chatbots help your Sales team focus on high-value, qualified leads.

This results in greater returns and more new business. With that said, they aren't a magic solution, and they won't automatically produce instant results. To make them truly effective, they need to be built accordingly based on a sound understanding of your customers and their needs.



Chatbots revive the art of conversation for the digital era



Get Your Free 30 Minute Chatbot Strategy Consultation

We will share conversational marketing strategies tailored to your business, and tell you how you can execute them. This is a great opportunity to take your first step into the world of conversational marketing. Click below to book a time that suits you.

[BOOK NOW](#)

www.digitallitmus.com