Building a lead generation chatbot

Hi, I'm Adi.

Inbound partner professor with HubSpot Academy. Former consultant. Professional musician.

I could talk for ∞ hours about: business strategy, project management, partner education and credentials, Harry Potter, visual art, and vocal music.

Agenda

Introduction

- Agenda
- Icebreaker

Chatbots: Why?

- Business rationale
- Cautionary note
- Conversational strategy

Examples!

- Examining examples of Lead Gen Chatbots
- Metrics

Conclusion

- Let's discuss/recap
- Next Steps
- Survey
- Let's connect

Time: 10 min.

Time: 10 min.

Time: 5 min.

Time: 20 min.

Show of hands:

Time: 2 min.

- Have you ever tried to design a chatbot before?

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- Have you ever tried to design a chatbot before?
- Has a chatbot annoyed you before?

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_____

- Have you ever tried to design a chatbot before?
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- Have you fielded live chat requests before?

Show of hands:

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- Have you ever tried to design a chatbot before?
- Has a chatbot annoyed you before?
- Have you fielded live chat requests before?
- How many of you think Adi Shah is a disguised AI agent?

Chatbots: Why?

Lead Generation Chatbot

- Goals: Lead acquisition, sales qualification, closing sales.

Support Chatbot

- Goals: Resolving customer issues, ticketing, etc.

Business Rationale

Trust in business has eroded

81% trust the advice of friends and families over business advice

55% don't trust companies they buy from as much as they used to

65% don't trust company press releases

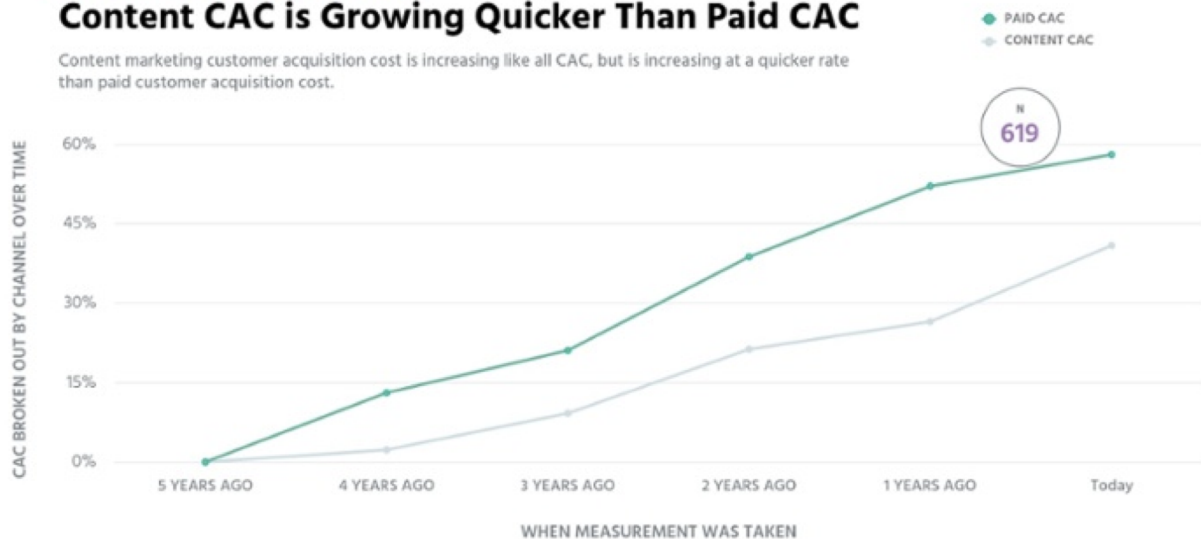**65%** do not trust advertisements, **71%** do not trust sponsored social media ads

HubSpot Research

COMPARING PAID AND CONTENT CAC

Content CAC is Growing Quicker Than Paid CAC

Content marketing customer acquisition cost is increasing like all CAC, but is increasing at a quicker rate than paid customer acquisition cost.

● PAID CAC
● CONTENT CAC

N
619

CAC BROKEN OUT BY CHANNEL OVER TIME

60%
45%
30%
15%
0%

5 YEARS AGO   4 YEARS AGO   3 YEARS AGO   2 YEARS AGO   1 YEARS AGO   Today

WHEN MEASUREMENT WAS TAKEN

N = 619 companies

SOURCE: 2018 CAC STUDY

Brought to you by

Consumers are impatient

Speed is everything to today's buyers, and patience wears out at 30 minutes.

82%

Percentage of consumers rating an "immediate" response as important/very important when they have a marketing or sales question

90%

Percentage of consumers rating an "immediate" response as important/very important when they have a support question

59%

75%

72%

Marketing → Sales → Support

Percentage of consumers who define "immediate" as 30 minutes or less, by customer lifecycle stage

HubSpot Research

How about a few **non-HubSpot** survey results, Adi?

>50%

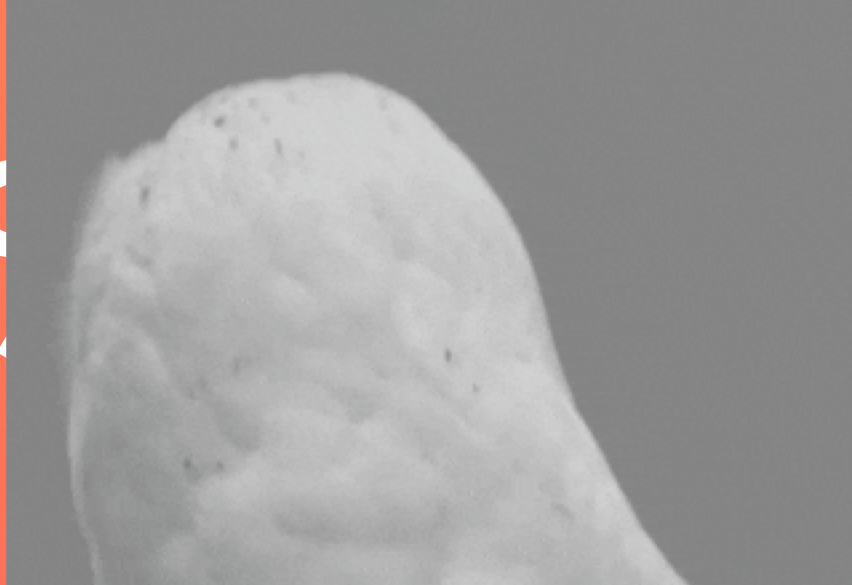**Over 50% of customers** expect a business to be open 24/7.

67%

67% of US millennials said they are likely to purchase products and services from brands using a chatbot.

85%

By 2020, it is predicted that **85% of consumer interactions will be handled without a human agent.**

85%

dicted that **85%**
ractions will be
a human agent.

Well-designed chatbots can:

- lower CAC

- lower interaction volume (calls, live chats, emails, etc.) and increase employee productivity and happiness

- scale front office (marketing, sales, service) operations without adding headcount

- generate data to improve your conversion strategy

- provide immediate, 24/7 help to delight leads

You're probably feeling pretty good:

But, wait! What's the other side of the coin?

Cautionary note

On the other hand…

30%
worry that a chatbot would make a mistake.

(The State of Chatbots Report, 2018)

43%
of people prefer to deal with a real-life assistant than a chatbot.

(The State of Chatbots Report, 2018)

47%
of adult internet users in the US felt that chatbots had too many unhelpful responses.

(Statista, 2018)

46%

46% of respondents believe that chatbots are used specifically to keep them away from live agents.

46%

...ondents believe that
...used specifically to
...way from live

Before building, make sure you're ready:

- Set aside time and resources to monitor the chatbot daily.

- Define a clear purpose for your chatbot.

- Make sure to set aside additional time to test and refine the conversational design.

- Always be learning.

Conversational strategy

Conversational design

- UX design + copywriting
- Predicting user behavior and tailoring chatbot **dialogue** accordingly
- Good bots don't grow on trees!

"The bricks we build our architecture with are words."

MARGARETH JABCZYNSKI
Conversational Intelligence Manager

twyla

Best Practices:

- Begin by building a flowchart

- Start with a polite, helpful greeting and question

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- Identify your audience

- Provide a clear "failsafe"

- Provide clickable options

- Economize on branches

- Ditch the human act

Begin with a flowchart.

Before you ever set foot inside HubSpot Chatflows, build a detailed plan outlining the chatbot's decision tree. You can use paper, a simple online tool such as creately.com note.ly, or even a piece of paper.
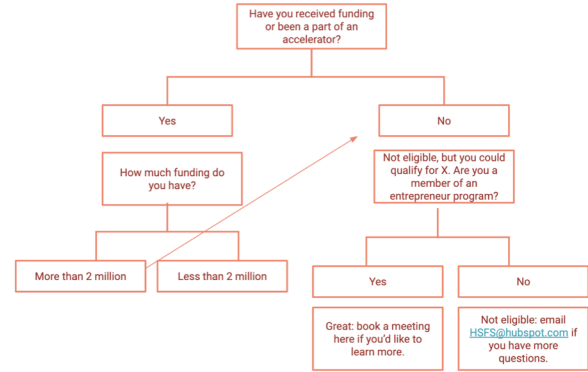
Start with a polite, helpful greeting and question

Don't try to *extract* value from the user first.

Add value by **politely** asking them what they're visiting your site/page for, set clear expectations, and end with a call-to-action. Once you have provided value, they will be more willing to share their email, book a meeting, or sign up for a free trial.

Have helpful error messages. If something went wrong, the user will immediately know. Give them another way to reach you: a number, email, etc.

Identify an audience

- Who are you building this chatbot for?
- What page will it sit on?
- Which personas do you want it to cater to?
- Request your front office teams to provide context as you define your audience.

Provide a clear "failsafe"

Allow the user to control the conversation. As the user gets deeper into the conversation, they may want to start over, go back to the previous question, speak to a human immediately, or otherwise change direction. Good chatbots give users freedom of choice.
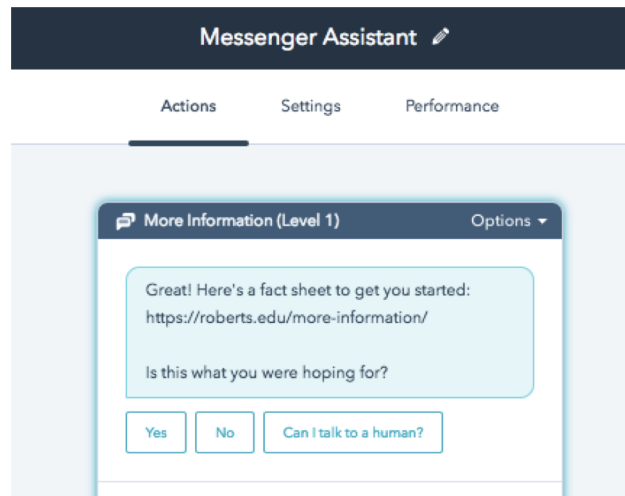
Provide clickable options.

Allowing free text input can lead to a lot of extra work, due to spelling errors, phrasing, etc. Unless you're asking them for personal information, consider disabling free text input and providing clickable options. You can always modify this as your chatbot grows.
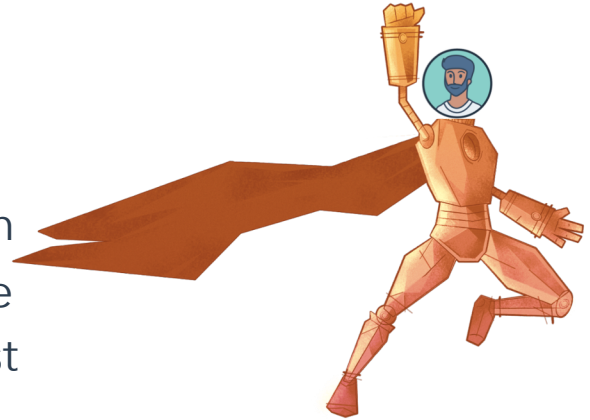
Economize on branches.

Investigate your conversational plan/flowchart for branches that can act as destinations for multiple paths. The fewer the branches, the easier it will be to build and iterate on your chatbot.

Ditch the human act

Some states, such as [California](), have even passed legislation to curb this. Even if your chatbot uses NLP (natural language processing) decision trees constructed by an experienced developer, it should be humble and transparent about being a chatbot. Most chatbots are built using branching logic, which is enough for many business interactions.

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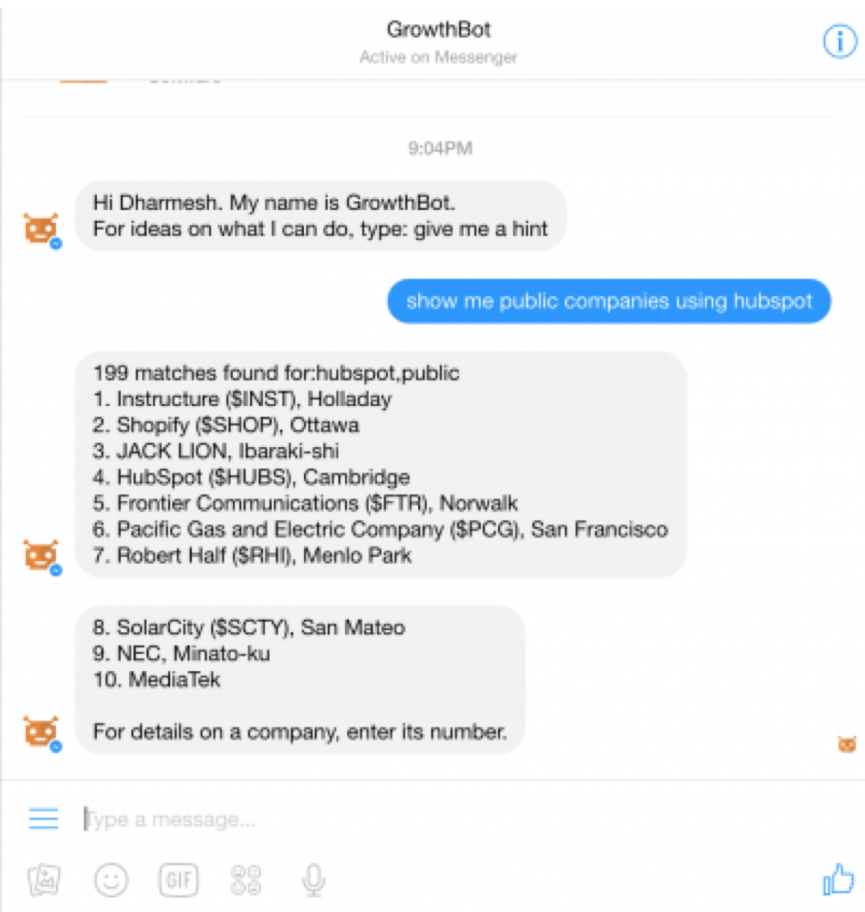- **E**conomize on branches

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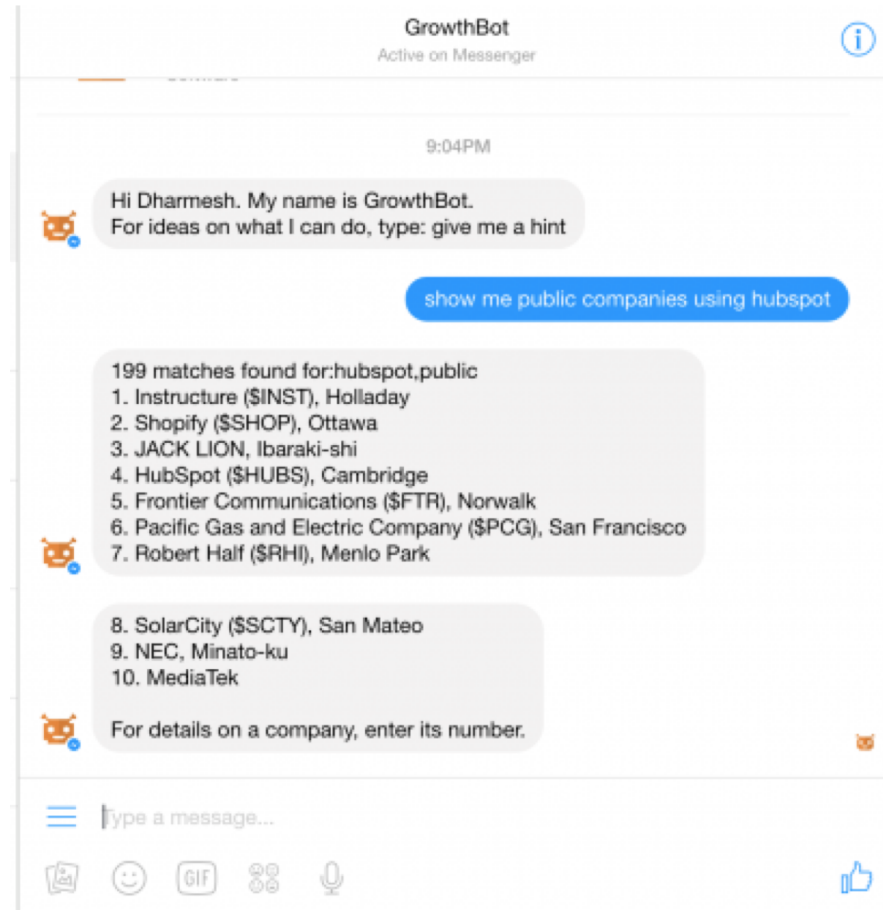Is your chatbot ready to **Be SHIPPED?**

Examples

Example One: GrowthBot

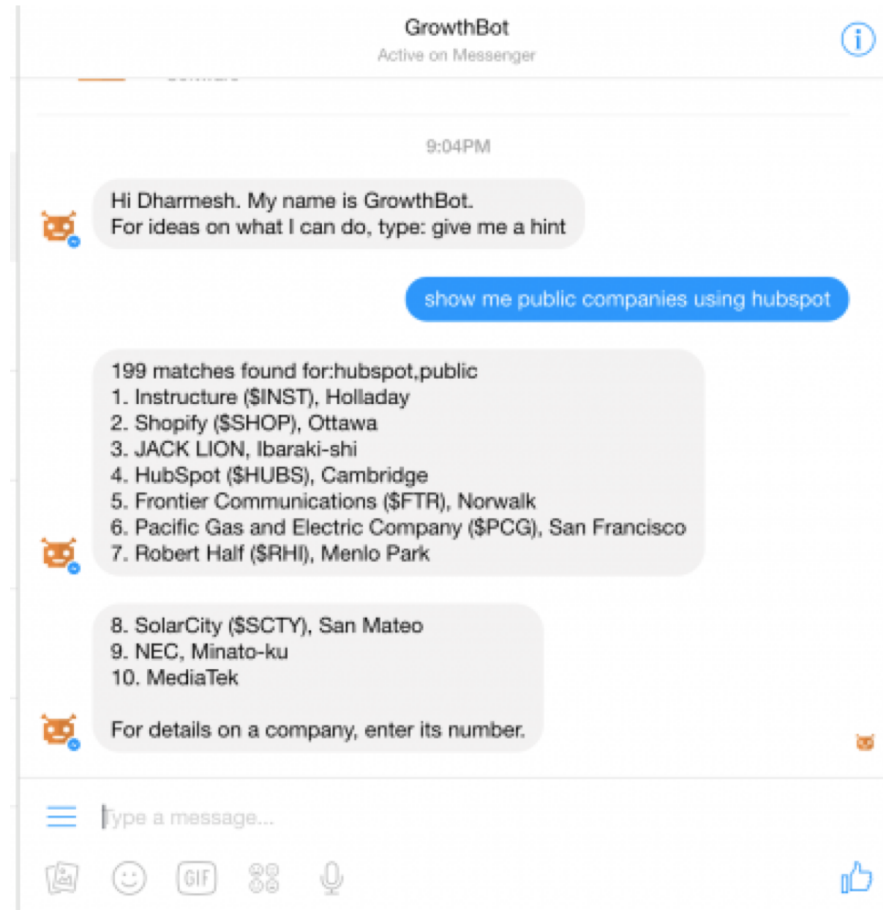- Does this chatbot pass the "Be SHIPPED" test and follow best practices?

GrowthBot
Active on Messenger

9:04PM

Hi Dharmesh. My name is GrowthBot.
For ideas on what I can do, type: give me a hint

show me public companies using hubspot

199 matches found for:hubspot,public
1. Instructure ($INST), Holladay
2. Shopify ($SHOP), Ottawa
3. JACK LION, Ibaraki-shi
4. HubSpot ($HUBS), Cambridge
5. Frontier Communications ($FTR), Norwalk
6. Pacific Gas and Electric Company ($PCG), San Francisco
7. Robert Half ($RHI), Menlo Park

8. SolarCity ($SCTY), San Mateo
9. NEC, Minato-ku
10. MediaTek

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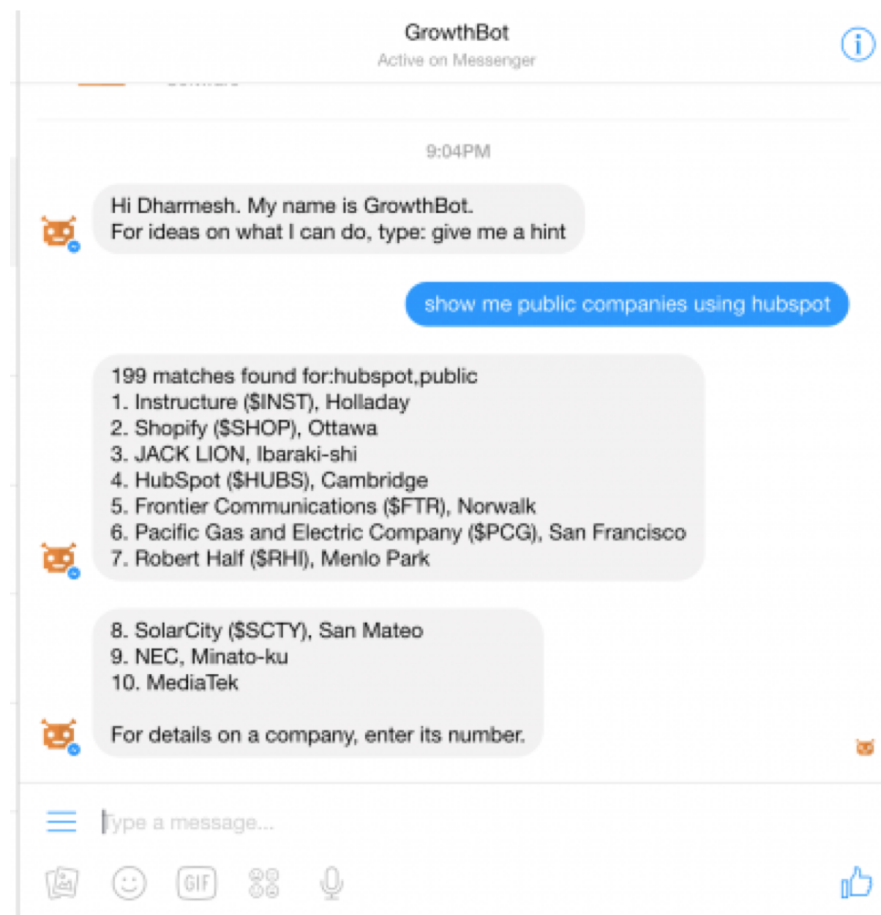
Type a message...

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- Results: 105k+ users in ~2 years.

Example Two: Anonymous

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█████ was automatically assigned to this conversation 20h ago

Hey there!
I'm █████ I'm here to get basic information about you and your query.
Welcome message 4:40 PM

Chatting from █████████████████████

Hello, are you a chat bot ?
Unknown visitor 4:40 PM

It's so good to meet you :)
Can I get your official email address, in case we get disconnected?
4:41 PM

no
Unknown visitor 4:41 PM

I'm sorry, that does not look like a valid email address. Please provide your official email address to proceed.
4:41 PM

no, again
Unknown visitor 4:41 PM

Example Three: Rock Hall of Fame

- Does this chatbot pass the "Be SHIPPED"
  test and follow best practices?

Hi Aditya! Thanks for reaching out.

What's on your mind? We're monitoring these messages and responding as fast as we can.

You can also click on the menu items below for shortcuts - including museum hours, tickets and who's inducted.

Buy Tickets   Check Hours   Who's Inducted?   What's on Display

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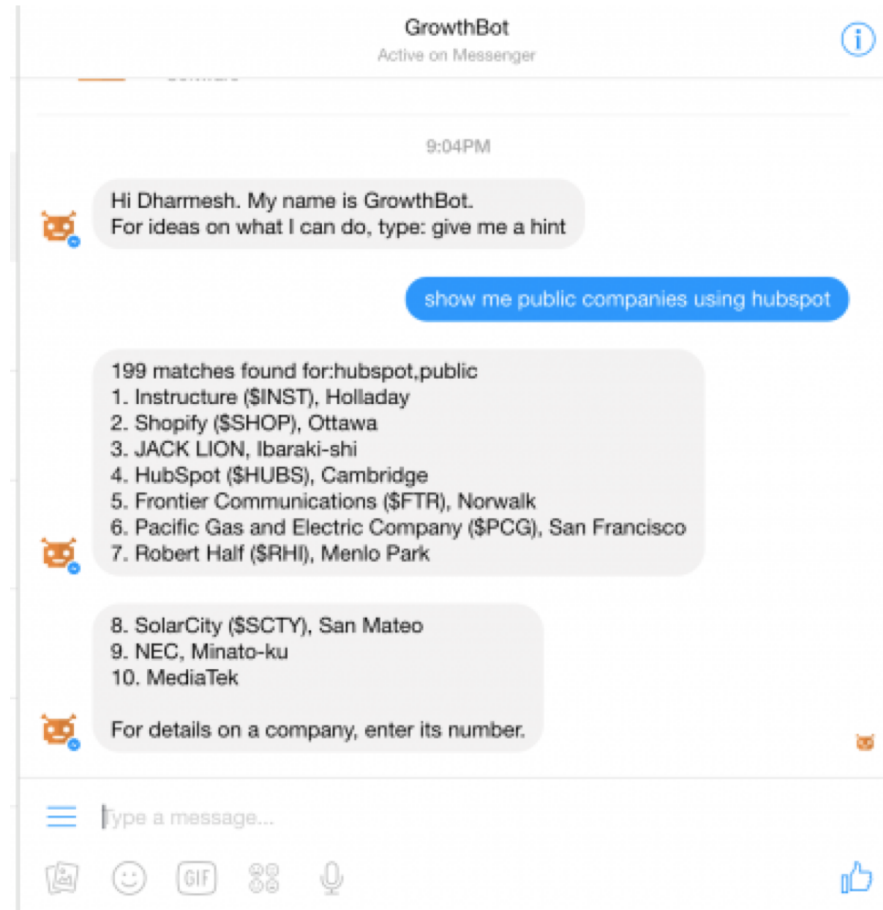
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Metrics

Common chatbot metrics:

- Goal completion rate

- User interactions

- Satisfaction rate

- Total number of new users

- Self-service rate

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- **G**oal completion rate

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- **S**atisfaction rate

- **T**otal number of new users

- **S**elf-service rate

GUSTS!

Total number of new users

The total number of users, to show the amount of data that your chatbot has been exposed to.
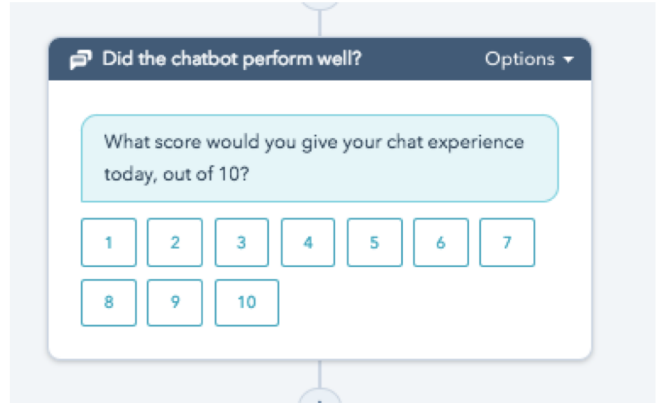
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Satisfaction rate

Chatbot NPS. You can keep this simple ("Did the bot perform well?" – Yes or No) , or invite more detailed answers. Create clickable options for 1-10, and allow users to rate their experience.

User interactions

The total number of user interactions (rather than users). A chatbot might have lots of users but a minimal amount of interactions, or it may have a small number of users that interact with it frequently.
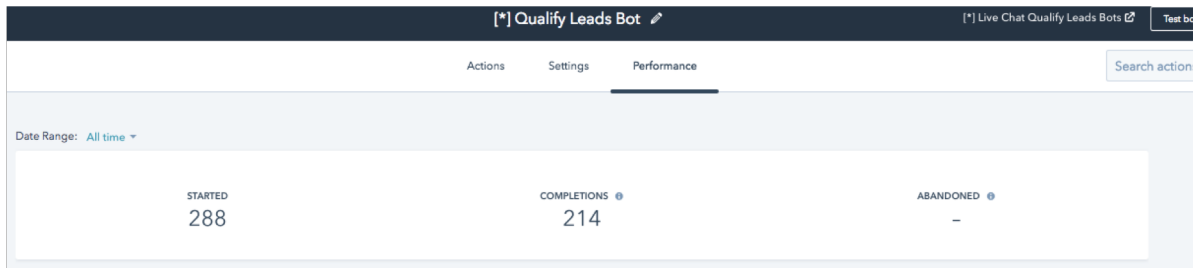
Goal completion rate

The percentage of engagements that are successful. If the goal is to book meetings, (how many meetings were booked)/(total number of interactions/users). For those who have access to calculated properties, you can do this at the contact or company level.

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Self-service rate

The number of users who get what they want from the chatbot without any human input. For example, if your chatbot's goal was to book a meeting, you will measure the percentage of user interactions that achieved that goal.

Summary of metrics:

- Total number of new users

- Satisfaction rate

- User interactions

- Goal completion rate

- Self-service rate

Advanced metrics:

- Revenue growth rate

- Fall back rate

- Confusion triggers

- Retention rate

- AI/ML rate

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- Fall back rate

- Confusion triggers

- Retention rate

- AI/ML rate

Let's connect

@ProfAdiShah

@HubSpotAcademy

Quick recap

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- **S**elf-service rate

GUSTS!

Congratulations! You're on your way to chatbot glory.

Next steps

- You can find a Chatbot lesson at this link: https://hubs.ly/H0nF8JP0

- Please take a few minutes and build a chatbot!

- Resources coming up afterwards!

Let's connect

@ProfAdiShah

@HubSpotAcademy

Thank you