

BUILDING A LEAD GENERATION CHATBOT

WORKBOOK

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WELCOME TO TODAY'S WORKSHOP

You're here today to learn more about creating a lead generation chatbot.

I'm thrilled to be sharing this time and space with you! Take advantage of your time during today's training—ask questions, make new connections, and absorb all these inspiring ideas about the world of inbound chatbots that we are helping create together.

By the end of this workshop, you will have:

- an outlined conversational strategy
- your first simple lead generation chatbot in HubSpot

Today's training will include:

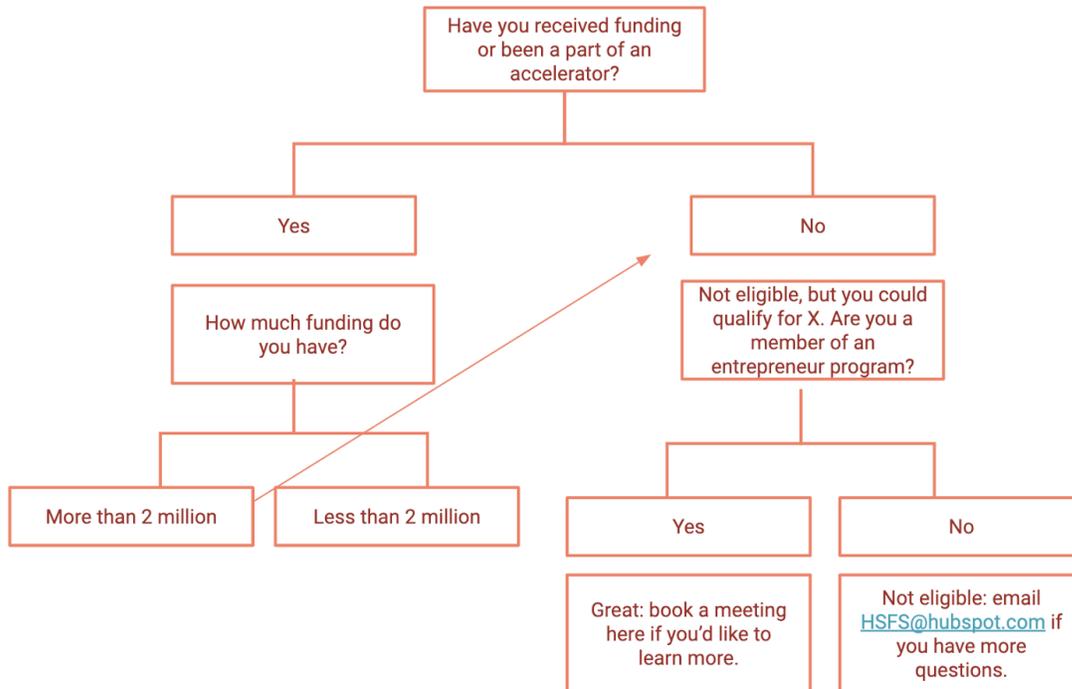
1. **A presentation on the business rationale behind chatbots, how to design a successful conversational strategy, metrics, and examples of success**
2. **Quick timed activities to put our knowledge into practice**

Are you ready? Make sure your out of office responses are up, distractions are removed, and let's get started!

Activity One: Flowchart your lead gen chatbot

(Use this space to draw a flowchart, or check out creately.com or note.ly)

See example flowchart on slide 88 [here](#).



Even before the first question, consider starting with a welcome message such as: *"Hey there, friend! I'm Jeeves, the Sommelier Chatbot. I can help you with wine and meal pairings. Let me know if you're planning to eat meat by selecting one of the options below."*

Activity Two: Build your lead generation chatbot in your HubSpot portal

1. Delete *all* existing branches *after* "Get Name." Click on Options > Delete.
2. Click on your welcome message and customize it. Keep it short, engaging, and enticing. Set expectations, provide a CTA. See previous page for the example of Jeeves, the Sommelier Chatbot.
3. Click on the "Get Name" box, and change it to "First Question." Go ahead and copy the first question from your flowchart into the "Message" text box.
4. Scroll down slightly to "Quick Replies," click on "Start typing to add responses," type a potential answer, and click on "Create option [your potential answer]." Repeat this procedure until all options are showing up with small x's on their right side (don't click these x's!). Click the bright orange "Save" button on the bottom left.
5. Once "Save" is greyed out after you've clicked on it, click on "If/then branches" on the top right of the right-side panel.
6. Click on "Add If/then branch," and set it to "If [visitors response] [contains any part of]" and select an option from the dropdown.
7. Toggle "Then go to" dropdown, and click on "Go to a new action."
8. Click on "Send simple message" to deliver an answer, or "Ask a question" if you need to ask a follow up question. Make sure to hit save once you've entered in the answer or question.

Activity Three: Test your neighbor's chatbot
(Feel free to take notes here)

Best Practices: Conversational Design



Best Practices:

- **B**egin by building a flowchart
- **S**tart with a polite, helpful question
- **H**ave a helpful error message
- **I**dentify your audience
- **P**rovide a clear “failsafe”
- **P**rovide clickable options
- **E**conomize on branches
- **D**itch the human act

Is your
chatbot
ready to
Be
SHIPPED?

Reporting/Metrics Summary:



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

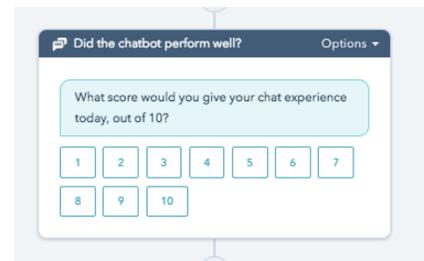
Total number of new users

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



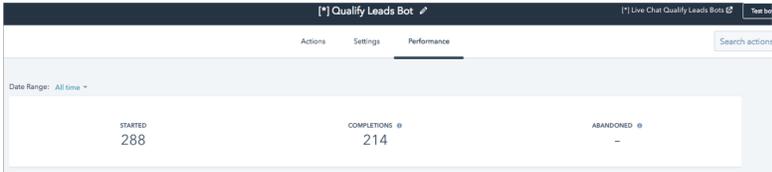
Satisfaction rate

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, $(\text{how many meetings were booked}) / (\text{total number of interactions/users})$. For those who have access to calculated properties, you can do this at the contact or company level.



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.



Setup Instructions

- See setup slides (11-21) [here](#).

OR

- Create a conversations inbox (instructions [here](#)).
- Connect a Chat Channel (instructions [here](#)).
- Create a bot (instructions [here, scroll down](#)).

Chatbot Actions in HubSpot

Chatbot action	Example
<i>Send simple message</i>	"Nice talking to you!"
Ask a question	"What can I help you with?"
<i>Offer email subscription</i>	"Subscribe to our newsletter by clicking here."
<i>Set contact/company property value</i>	Chatbot will save first name to contact property <i>first name</i> if you so choose.
<i>Add to static list (Marketing Hub Starter+)</i>	Based on a series of answers, a chatbot will add contact to a static list.
<i>Submit a ticket</i>	Based on end-users actions, chatbot will submit a customer support ticket
<i>Knowledge base lookup (Service Hub Pro+)</i>	Chatbot will search your knowledge base for answer to end-user's questions
<i>Send to a team member</i>	Chatbot will pass conversation to a human
<i>Enroll in workflow</i>	Based on end-users actions, chatbot will automatically enroll end-user in a specific workflow.
<i>Trigger a webhook</i>	See here .
<i>Run a code snippet</i>	See here .
<i>Book a meeting</i>	Chatbot will share a meetings link with end-user.
<i>If/then branches</i>	Chatbot will skip to a specific answer based on answers.