Using Chatbots to Improve the Customer Experience

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Is a bot right for my business strategy?

Write yes or no to the following questions to determine if a bot is right for your business strategy.

1. Is human bandwidth a constraint?

2. Do I need to collect data, or report on conversations?

3. Is the cost of making a mistake low?

4. Do our customers or prospects need standardized answers?

Outline your chatbot

1. What's the goal of your chatbot?

2. What web page(s) should the chatbot live on?

3. Who should see my chatbot?

4. What are some HubSpot actions you'd like to use?

Flowchart your chatbot

If you don't have a preferred method of creating a flowchart, feel free to use this blank page,
or check out some of the free online software: note.ly or Miro

Create a chatbot in HubSpot

1. In your HubSpot account, navigate to **Conversations**, and then **Chatflows**.

2. In the upper-right, click **Create chatflow.**

3. In the left sidebar, select a bot template: Qualify leads bot, Book meetings bot, or Support bot*.

4. In the upper right, click the pencil icon edit and select a language from the dropdown menu.

5. Click Next.

6. On the Build tab, customize the bot template and create a welcome message that will greet your visitors.

7. To edit the welcome message content, click the Welcome message step in the bot template.
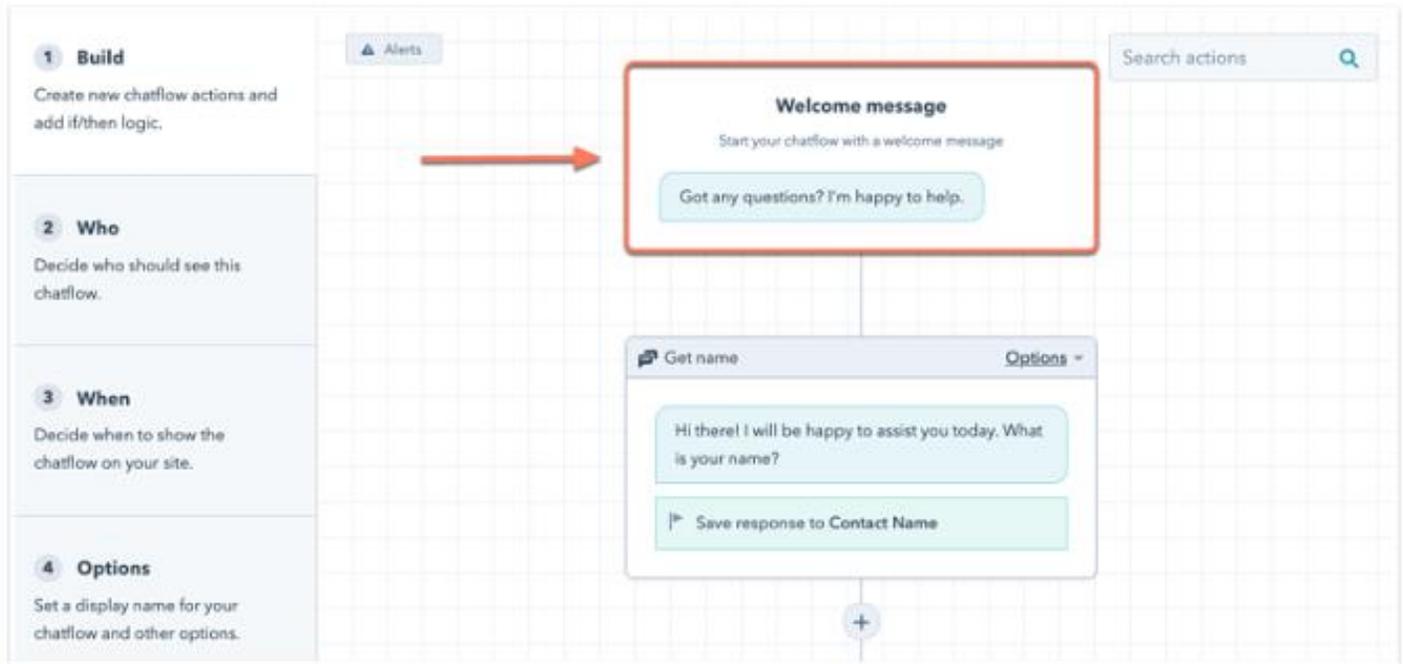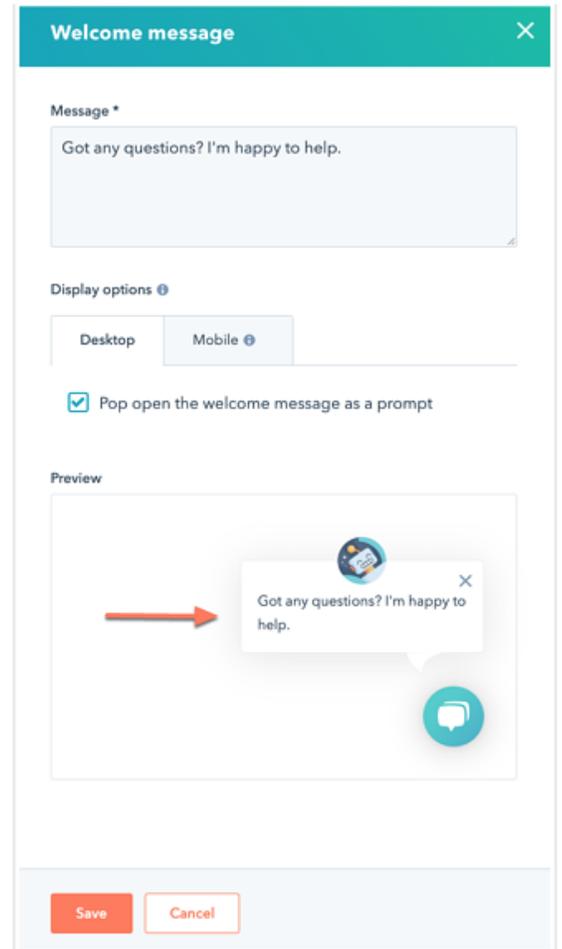

8. In the Welcome message panel that opens on the right:

9. Enter a welcome message.

10. In the Display options section, customize the bot widget's behavior on desktops or mobile screens.

11. To prevent the welcome message preview from appearing on desktop until a visitor clicks the chat icon, on the Desktop tab, clear the Pop open the welcome message as a prompt checkbox.

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12. To prevent the chat widget from appearing on small screen sizes, click the Mobile tab then clear the Show chat icon on small screen sizes checkbox

13. To prevent the welcome message preview from appearing on small screen sizes until the visitor clicks the chat icon, click the Mobile tab then clear the Pop open the welcome message as a prompt checkbox.

14. Click Save.

Welcome message ×

Message *

Got any questions? I'm happy to help.

Display options ⓘ

Desktop   Mobile ⓘ

☑ Pop open the welcome message as a prompt

Preview

Got any questions? I'm happy to help.

Save   Cancel

**Modify a bot message or action**

1. To modify a bot message or action, click the action in the bot template and in the right panel, edit the bot action. Learn more about setting up a bot action.

2. Once you're done editing the action's settings, click Save or click the If/then branches tab to set up the flow of your conversation.

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Add new questions or actions

1. To add new questions or actions, click the plus icon.
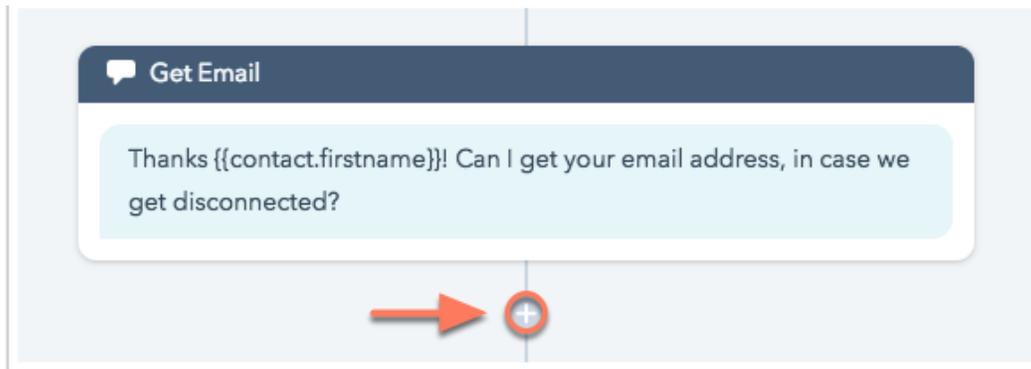
Reconnect actions

1. To reconnect any actions that became disconnected when editing your bot's flow, click the Alerts button in the top left. You can also search for any disconnected actions using the Go to action search bar in the upper right.

2. When you're done editing the bot's actions, in the top right, click Preview to see what your bot will look like on your website.

3. To continue, click Save at the bottom, then click the Who tab in the left sidebar.

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Who - select a target audience

1. On the Who tab, specify which visitors should see the live chat widget on your website.

2. Select one of the following audiences:

3. Everyone: anyone who visits your site will see your bot.

4. Anonymous visitors: only untracked visitors who visits your site will see your bot.

5. Tracked contacts: only tracked contacts who exist in your HubSpot account will see your bot.

6. Segmented lists: only tracked contacts who meet your smart list criteria will see your bot.
   If you select this option, click the additional dropdown menu to select your smart list.

7. To hide your bot from contacts who meet a specific list criteria, click the Hide chatflow from dropdown menu and select the list.

When - decide when the chatflow should appear on a page

1. On the When tab, specify when the chat widget should appear on your website.
   You can trigger a live chat widget when a visitor loads a specific website URL, or when they load a URL that includes certain query parameters.

2. Click the first dropdown menu and select Website URL or Query Param:

When you select Website URL:

1. Click the second dropdown menu and select a targeting rule for your website URL.
   The options are: is all pages, is, isn't, contains, doesn't contain, starts with, or doesn't start with.

2. When selecting an option other than is all pages, enter the specific URL.

3. To add a wildcard option, enter the * character anywhere in the URL.
   This allows you to display your chat widget on multiple pages without explicitly defining each URL.
   Multiple wildcards can be used within the same URL.

When you select Query Param:

1. Enter the query parameter.

2. Click the second dropdown menu and select a targeting option for your query parameters.
   Your options are: is, isn't, contains, doesn't contain, starts with, or doesn't start with.

3. Enter the parameter value.Save at the bottom, then click the When tab in the left sidebar.

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Click **OR** to add more rules or click the trash icon delete to delete an existing rule.

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Options

1. Enter a display name for the bot in the Chat heading field.

2. To edit your avatar's photo, hover over the avatar and click Change photo.

3. To customize the amount of time after inactivity before the chat session is reset to the beginning, click the Session timeout dropdown menu and select an option. The chat session will not reset if a visitor completed every bot action in a past session.

4. To set a delay between each message that is sent to visitors, click the Typing delay between messages dropdown menu and select an option.

5. To customize the response visitors see when a request fails, enter error messaging in the Error response field.

6. To change the bot's display language, click the Select a language dropdown menu and select a different language.

7. To decide if the chatflow should appear based on the team's availability you set at the inbox level, click the Availability dropdown menu and select an option.

8. If you've enabled GDPR in your account, you can also include a step to ask your website visitors for their consent to process their data.

9. To capture a visitors' consent to process their data, click to toggle the Consent to process data switch on.

10. Click the Consent type dropdown menu and select one of the following:

11. Require explicit consent: with this option enabled, visitors will need to click I agree before they can send a message.

12. Legitimate interest: visitors' consent is implied when they start to chat with you. The consent to process data text will still display, by they do not need to click I agree to start the chat.

13. In the Process consent text field, explain why you need to store and process your visitors' personal information.

14. Click Save.

15. When you are done editing the bot, in the upper right, click to toggle the switch on to add it to your website pages.

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Chatbot Actions in HubSpot Glossary

Chatbot action	Definition/Example
Send simple message	Chatbot will send a simple message such as: *"Nice talking to you!"*
Ask a question	Chatbot will ask a simple questions such as: *"What can I help you with?"*
Offer email subscription	Chatbot will ask whether or not end-user would like to subscribe to emails. For example: *"Subscribe to our newsletter by clicking here."*
Set contact/company property value	Chatbot will save information to CRM properties. For instance, when end-user says their name, chatbot will save their name to the *first name* contact property.
Add to static list (Marketing Hub Starter+)	Based on a series of answers, a chatbot will add contact to a static list.
Submit a ticket	Based on end-users actions, chatbot will submit a customer support ticket.
Knowledge base lookup (Service Hub Pro+)	Chatot will search your knowledge base for answer to end-user's questions.
Send to a team member	Chatbot will pass conversation to a human.
Enroll in workflow	Based on end-users actions, chatbot will automatically enroll end-user in a specific workflow.
Trigger a webhook (Enterprise only)	Chatbot will trigger a webhook request.
Run a code snippet (Enterprise only)	Chatbot will run a code snippet at a step in the bot conversation flow.
Book a meeting	Chatbot will share a meetings link with end-user.
If/then branches	Chatbot will skip to a specific answer based on answers.