

 Alerts

1 Build

Create new chatflow actions and add if/then logic.

2 Who

Decide who should see this chatflow.

3 When

Decide when to show the chatflow on your site.

4 Options

Set a display name for your chatflow and other options.

What do you think of Chatflows?

HOW TO CREATE A CHATBOT IN HUBSPOT THAT TURNS WEBSITE VISITORS INTO SALES CONVERSATIONS IN YOUR SLEEP

Phoenix HubSpot User Group

JOSH PAUL



SMALL MARKETING TEAMS

 Get Name

Options ▾

This action and any if/then branches will be skipped if First name already exists

Can I Help

 Get Role

Options ▾

Nice to meet you, **Contact: First name**. What is your role in the company?

Business Owner

Executive

Sales

Marketing

Support

Operations

Other



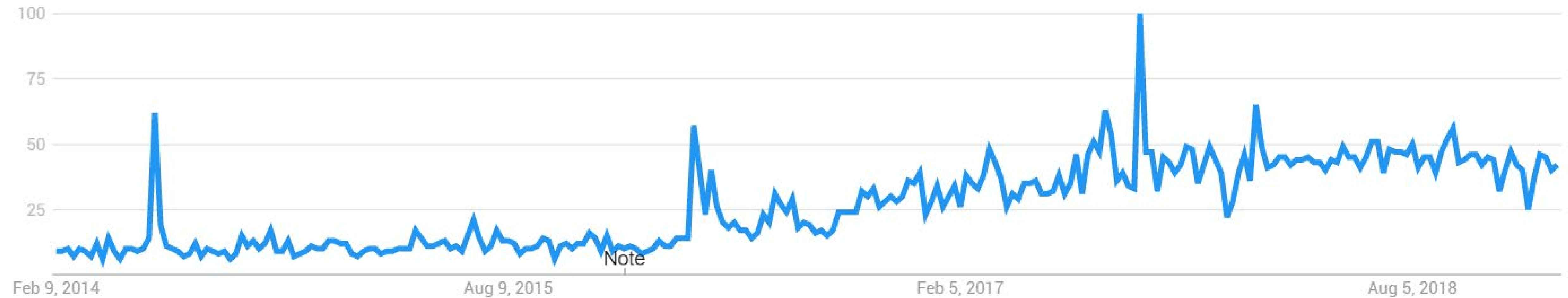
Goal For Today:

Give you the confidence and the blueprint to create smarter and more impactful chatbots using HubSpot.

A puzzle of a US \$100 bill is shown on a wooden background. The puzzle pieces are arranged to form the bill, with some pieces missing and others floating around. The bill features the portrait of Benjamin Franklin and the text "ONE HUNDRED DOLLARS".

Who Is Using Chatbots and How?

Search Term: Chatbot



Where Are We In This Tactic's Lifecycle?



What Do You Want To Know?

A background image featuring a line of white LEGO Stormtroopers from Star Wars, slightly out of focus. A semi-transparent dark purple overlay covers the entire image. A short blue horizontal line is positioned to the left of the title text.

How Is Conversational Marketing Different?

Digging vs. Serving



One-Way

Make your website visitors find the information they seek on their own.



Two-Way

Find out exactly what your website visitors need and guide them to the answers.

You Didn't Come Here Get Common Knowledge



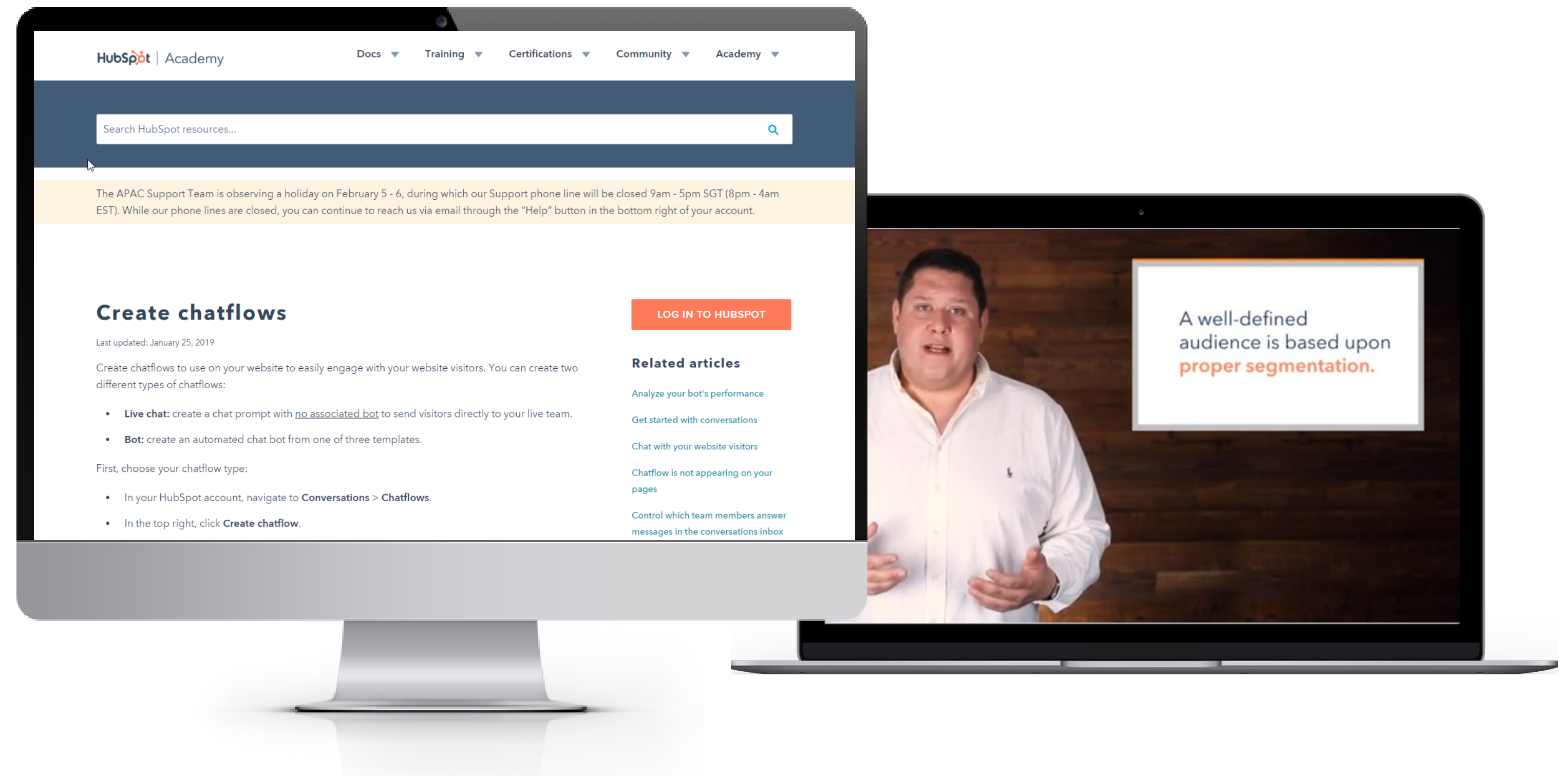
HubSpot Masterclasses



HubSpot Academy



Video Training



A photograph of two women climbing a rocky mountain peak. One woman, with short brown hair and wearing a green shirt, is reaching out to help the other woman, who has long blonde hair and is wearing a brown sweater and blue shorts. They are both smiling and appear to be enjoying the climb. The background shows more jagged rock formations under a clear sky.

Better Opportunity To Build Trust,
Relationships, & Connection

A smiling woman with curly hair, wearing a white shirt, is walking on a city street. She is carrying several shopping bags, including a large white one and a red one. The background shows a blurred city street with buildings and other people.

Closer To How People
Want To Buy

A person with short brown hair, seen from behind, is looking at a wall covered in various strategy diagrams, flowcharts, and sticky notes. The person is wearing a grey and black striped sweater. The wall is filled with papers, some with handwritten notes and others with printed diagrams. A blue horizontal line is positioned above the title text.

How To Plan Your Strategy



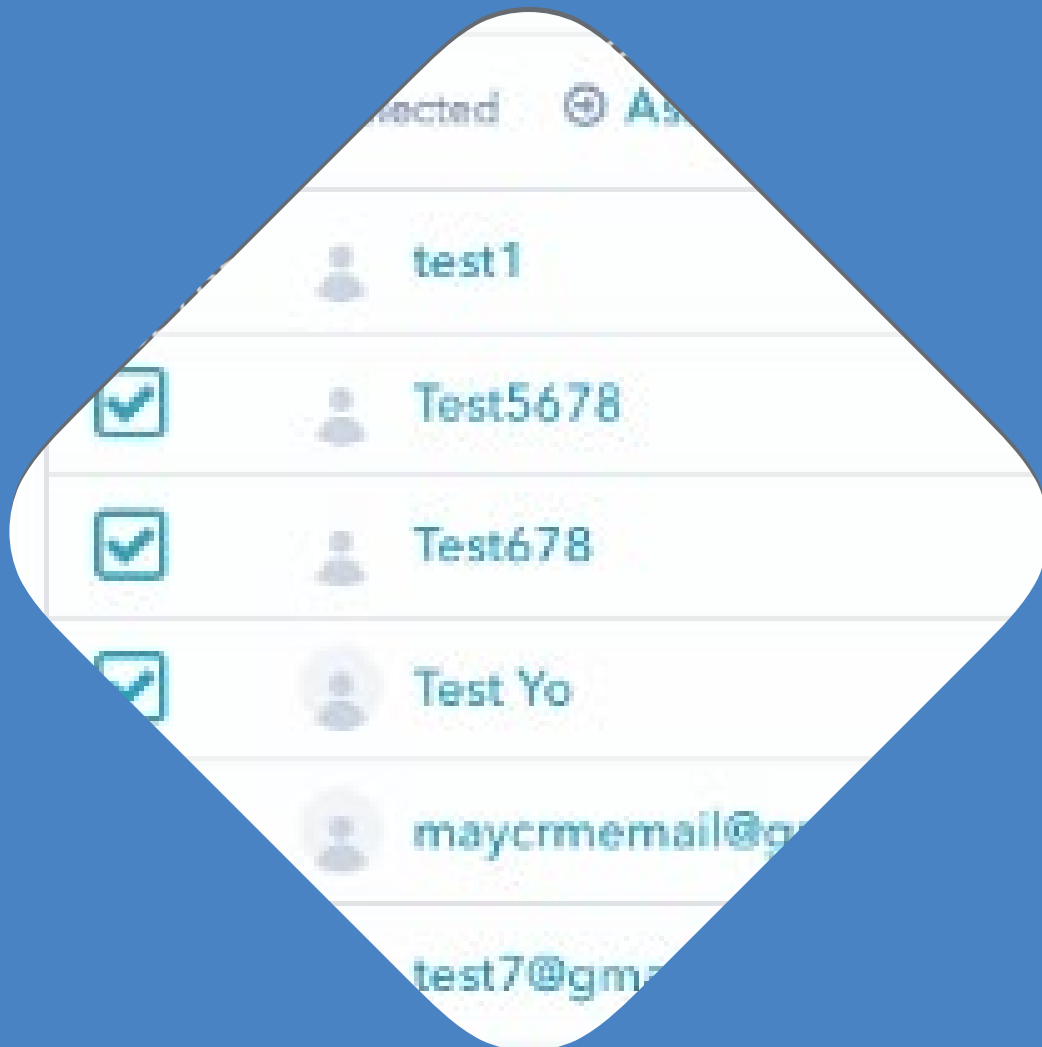
Rule #1: Your Chatbot Strategy Is Part Of Your Overall Flywheel Strategy

- ▶ CONVERTING VISITORS INTO LEADS
- ▶ TURNING LEADS INTO PAYING CUSTOMERS
- ▶ CREATING CUSTOMERS FOR LIFE & ADVOCATES

Rule #2: Conversational Marketing & Chatbots Require Traffic



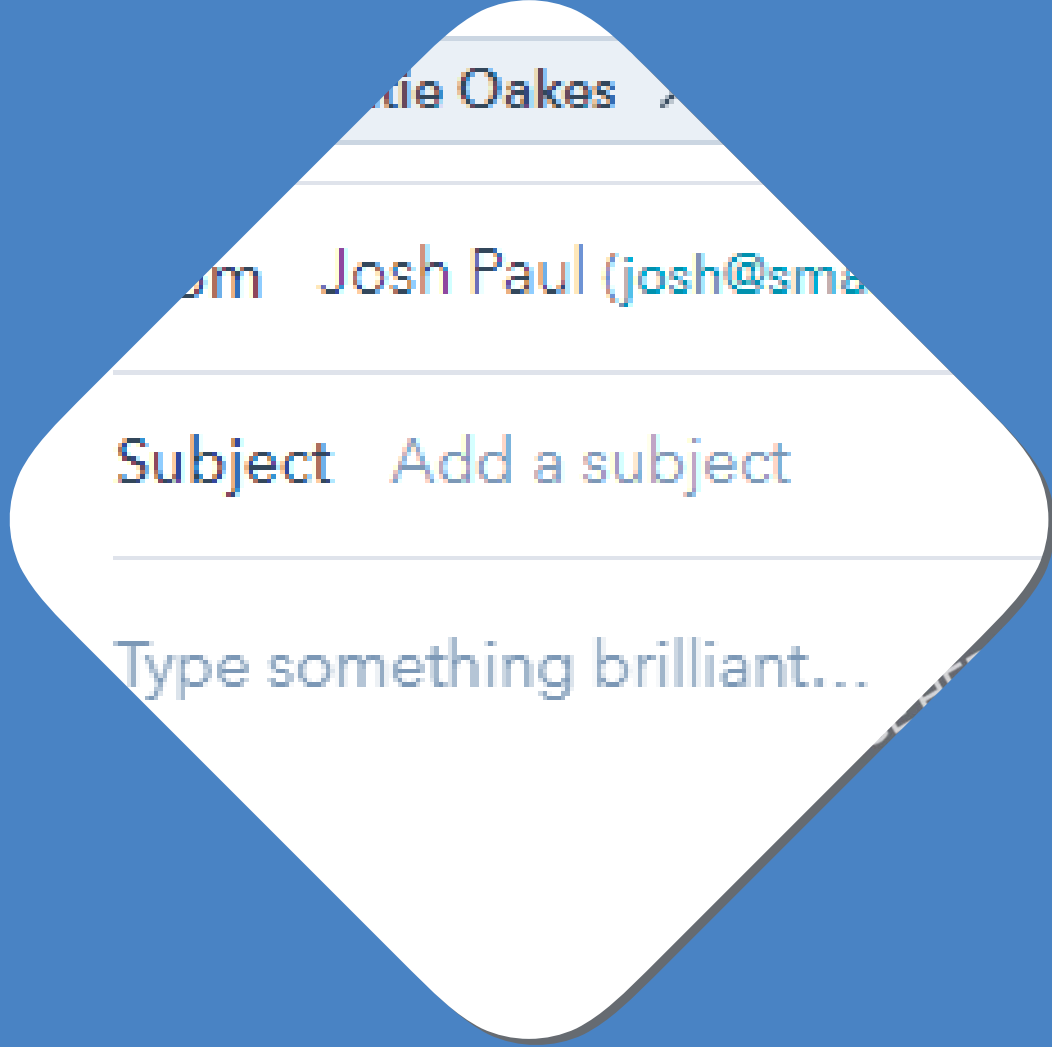
UNKNOWN BROWSERS



KNOWN VISITORS



SPECIFIC RESOURCES



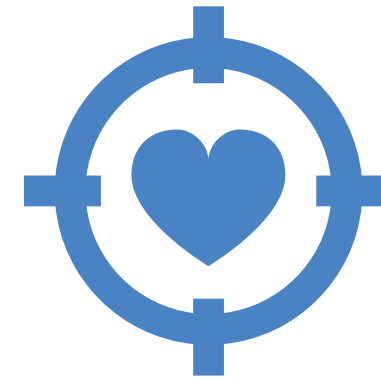
ABM

Three Types of Chatbots



TRANSACTIONAL

Actions that people need to take.



QUALIFICATION

Bringing people down your sales funnel.



SUPPORT DEFLECTION

Delighting people by getting them answers.

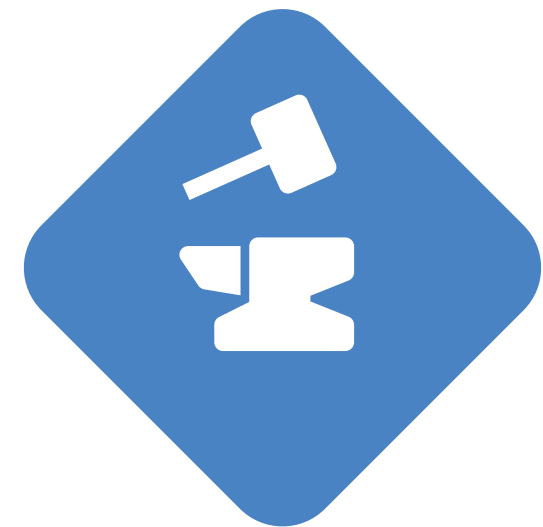
Simple & Strategic Chatbot Planning Framework

WHO	WHAT	WHEN	WHERE	HOW
Who will this chatbot target?	What actions would like this audience to take? (goal)	When would you like this chatbot to appear?	Which pages would you like this chatbot to display?	How are you going to use the chatbot options to get people to achieve this goal?

Sample Chatbot Canvas

WHO	WHAT	WHEN	WHERE	HOW
Who will this chatbot target? All website visitors that have not had a conversation with sales yet.	What actions would like this audience to take? (goal) Schedule a sales call.	When would you like this chatbot to appear? When they visit their second page.	Which pages would you like this chatbot to display? All marketing website pages. Not the blog or landing pages.	How are you going to use the chatbot options to get people to achieve this goal?

Common Pitfalls & How To Avoid Them



ONE-SIZE-FITS-ALL

Create different chatbots for different points in your flywheel/funnel.



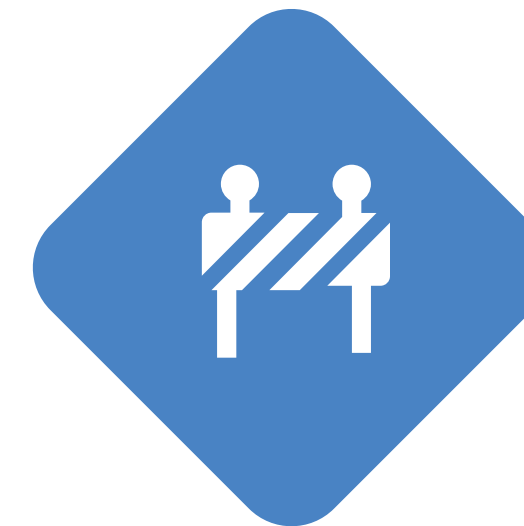
GOING LIVE TOO EARLY

Set up qualification and routing questions before connecting people with a live agent.



CHATBOTTING IN A VACUUM

Weave chatbots into your existing marketing and sales funnels.



DEAD ENDS

Once people have made micro-commitments and their trust grows, create additional engagement opportunities until THEY choose not to take them.

Anatomy Of An Effective Chatbot

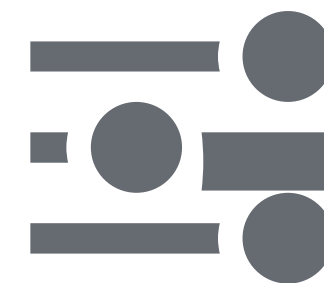
Welcome
Message



Question #1



Actions




Micro-
Commitments



1 Build

Create new chatflow options and add if/then logic.

 Alerts

Inbound if/then branch

Can I Help

2 Who

Decide who should see this chatflow.

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What do you think of Chatflows?

 Get Name

Options ▾

This action and any if/then branches will be skipped if First name already exists.

Super. May I have your first name?

 Get Role

Options ▾

Nice to meet you, **Contact: First name**. What is your role in the company?

Business Owner **Business Owner** Sales

Marketing

Support

Operations

Other

HubSpot Chatbot Takeaways

01 Start Simple

03 Add Human Elements

02 It Is All About The Hook

04 Branches Add Complexity Fast