

CUSTOMER RELATIONSHIPS, MANAGED:

EVERYTHING YOU NEED TO KNOW ABOUT CONVERSATIONS, THE NEWEST
ADDITION TO HUBSPOT CRM.

Brian Bagdasarian

Customer Relationships, Managed:

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BRIAN BAGDASARIAN



Sort of...

#PARTNERDAY18



BREWS ON TAP

Granite Roots Brewing > Brews on Tap

CURRENTLY SAMPLING IN TAP ROOM

WITTY BLUES

Belgian Witbier | ABV: 5.1%

We crafted a refreshing Belgian Witbier with subtle notes from the blueberries we added during fermentation. Unique growing Conditions west of Mt. Monadnock allows us to grow some of the happiest blueberries in New England.

WITCHES BREW

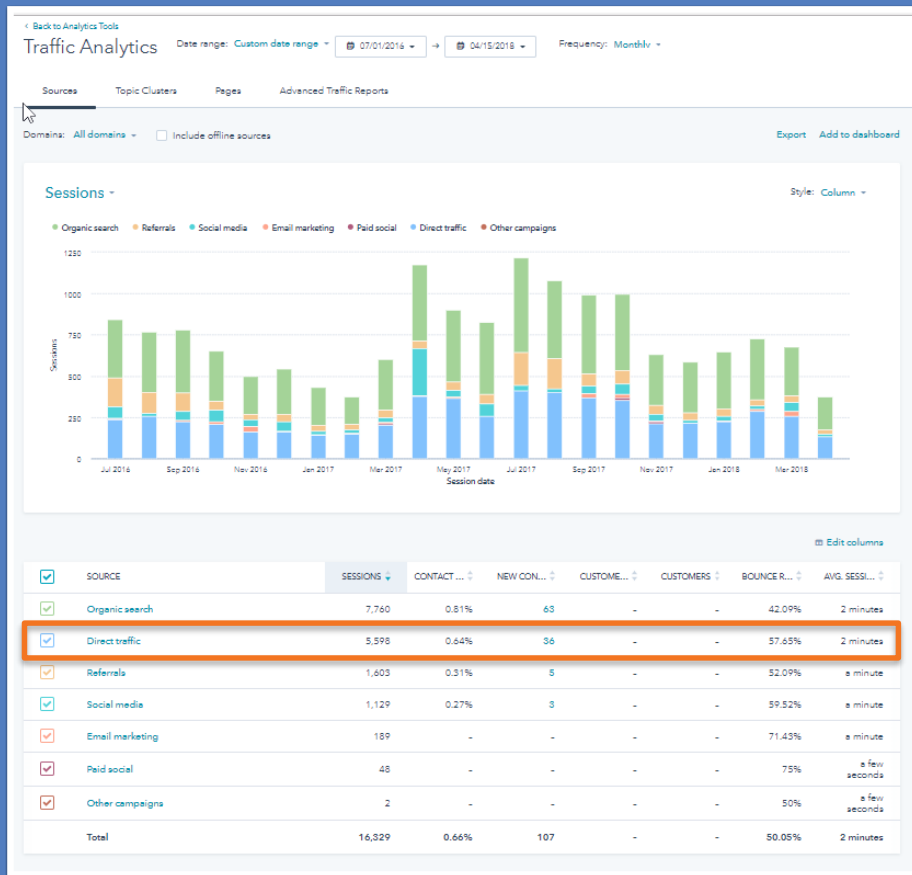
American Pale Ale | ABV: 5.6%

An American Pale Ale with a refreshing Lemon flavor for spring, and just enough blackcurrant to add a pink hue in honor of the Pink Boots Society, a non-profit for women in the beer industry. The name comes from medieval times when women were brewers. They would wear tall pointy hats to be identified at markets.

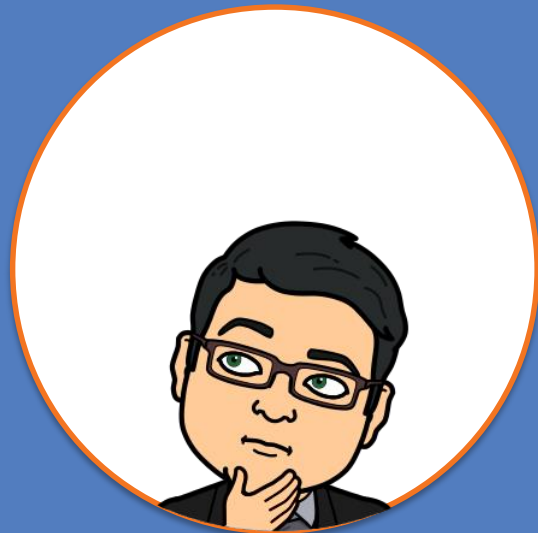
SOUR PARADISE VALLEY

Kölsch | ABV: 4.8%

A sour version of our refreshing take on a traditional German ale. Hints of honey and citrus compliment the Kolsch flavors. There is a lot going on in this beer, but we still put this in the "starter category" for sours.



5,598 Sessions of Direct Traffic



THINKING...



The background is a solid orange color. There are several abstract circular shapes in a lighter shade of orange. One is a small circle on the left. Another is a large circle at the bottom left. In the top right corner, there are three concentric circular arcs.

Understand the “Why”



forms?



here's where convo gets
cool

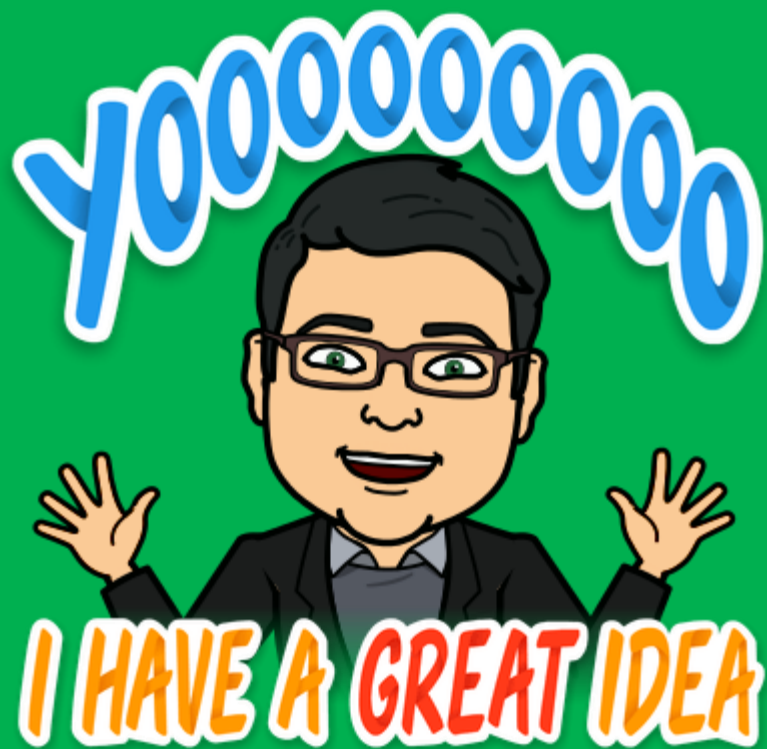


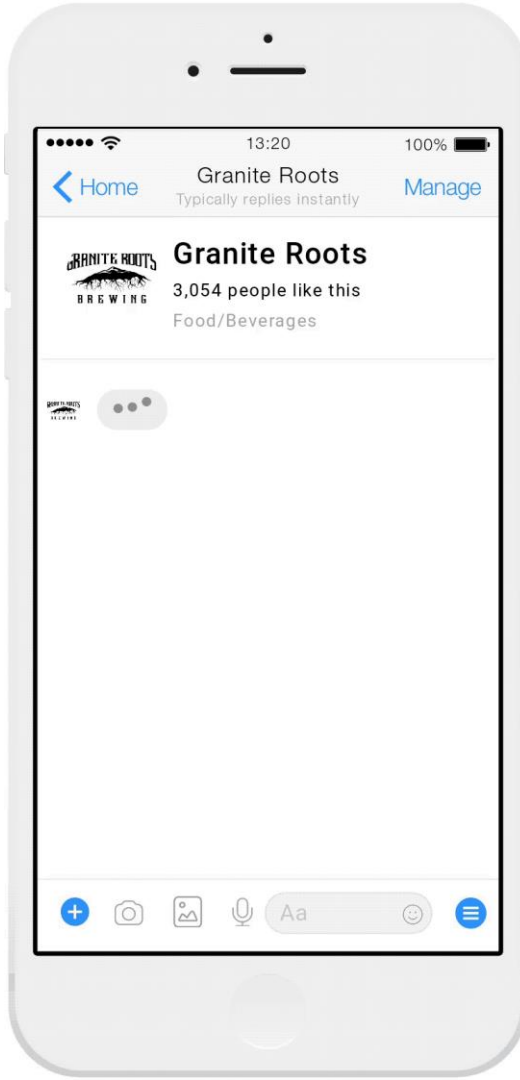


hits = implicit data collection

Cool Data

- Direct traffic to a deep page – indicated bookmark
- Multiple visits to same page over period of time – looking for updates









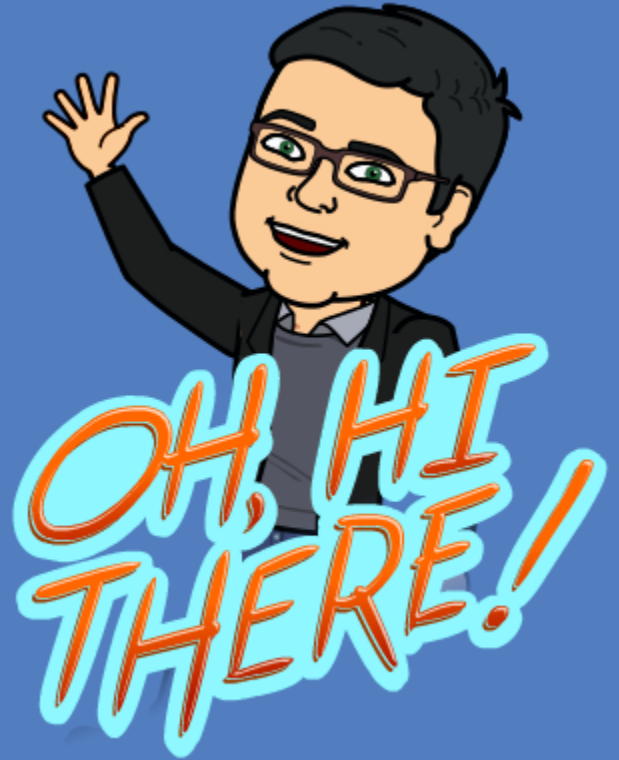
engagement alone is
enough.



no email = no worries.

still valuable.

they exist – conversations
knows.



how?

simple question = make life easier.

give them info they wanted to know.

without any other action.





feel personal.

he can build 1-1 relationships.

fully automated.

we can do it over and over.

that feels personal

that feels special

that feels unique

1-1 relationships. At scale.

Conversational =

Platform Level Thinking




Unified Inbox

The screenshot displays the HubSpot Unified Inbox interface. At the top, a navigation bar includes tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The main interface is divided into three sections:

- Left Sidebar (Inbox):** A list of conversation categories with counts: All conversations (63), Assigned to me (7), Unassigned (2), Email (50), Chat (13), Bots (4), and Filtered (15).
- Central View:** Displays a conversation thread. The top header shows filters: Status: All, Channel: Email, Assignee: Cody Wilson, Tags: support, and Date: All time. The thread includes:
 - A message from **Johnny Appleseed** (3m): "Cupcake candy sesame snaps bear claw pie..."
 - A message from **Jason Williams** (Mar 13): "Hey, I've been thinking about upgrading my basic plan..."
 - A message from **Jackie Simpson** (1d): "Hey there! I'd like to talk to someone about up..."
 - A detailed message from **Johnny Appleseed** (July 10, 9:00am) titled "Need help syncing my account". The message content is: "Hi there! I was trying to sync my old account to this new one but ran into some trouble. I wanted to see if you'd be able to help? It seems like the page is freezing up. Not sure what to do next. Thanks, Johnny Appleseed".
 - A response from **Cody Wilson** (July 10, 10:00am): "Hi Johnny, So sorry to hear about that. Looks like there is a bug on our end - I super appreciate you bringing it to our attention! I'll work with my team to get that resolved; but in the meantime let's see if I can help get you set up from here. - Cody Wilson".
- Right Sidebar:** Contains contact information for **Johnny Appleseed** (Designer at Biglytics) and a section for **About Polar Bear** with details like First name (Polar), Last name (Bear), Email (polar@northpole.com), Create Date (10/06/2017 11:05 AM EDT), Lifecycle stage (Opportunity), and HubSpot owner (Loe Lee). It also lists **Tickets**, including an "Account setup inquiry" with status "dropdown" and created 2 days ago.

Contextual Bar



Johnny Appleseed
Designer at Biglytics

[Ticket](#) [Deal](#) [More](#)

▼ **About Johnny Appleseed**


First name
Johnny

Last name
Appleseed

Email
jappleseed@biglytics.com

Create Date
10/06/2017 11:05 AM EDT

Lifecycle stage
Opportunity


HubSpot owner
 Cody Wilson

▼ **Tickets**

[Account setup inquiry](#)

Status: dropdown

Create: 2 days ago



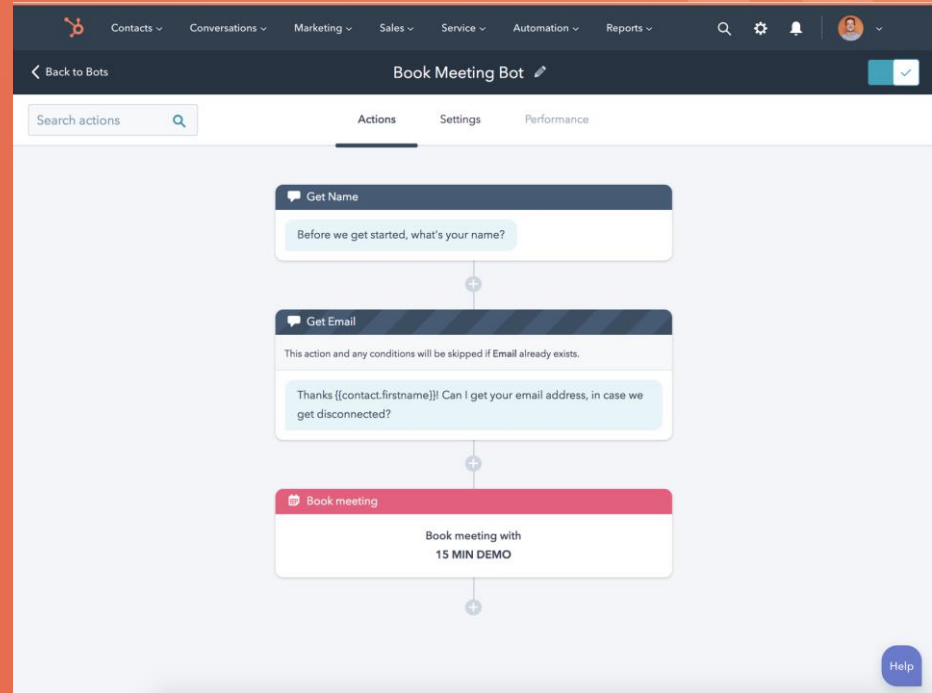
➤ **Deals**

➤ **Past Conversations**

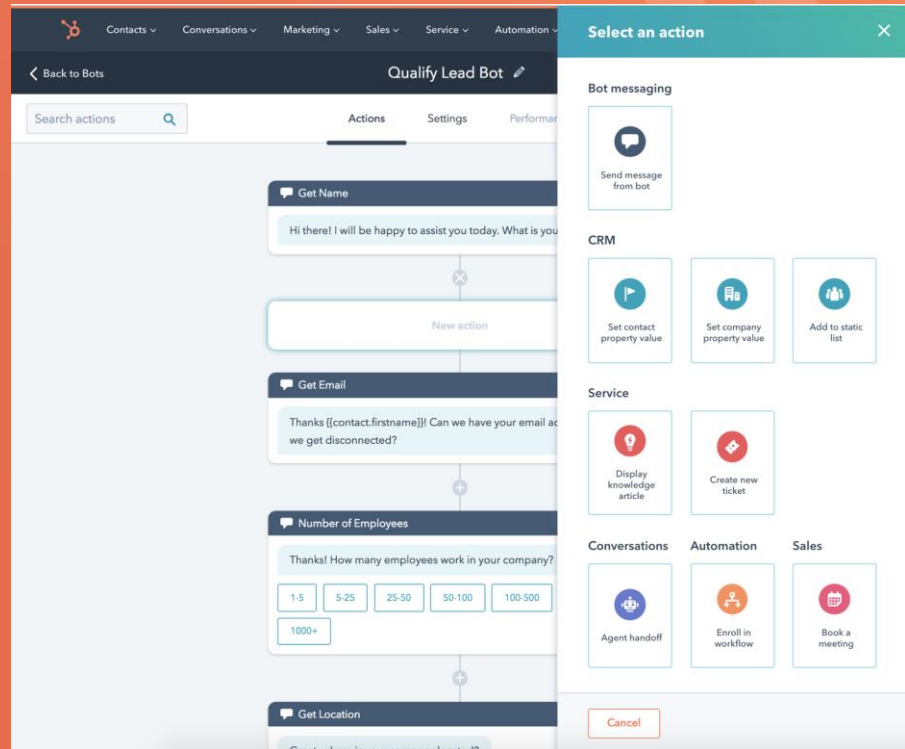
Shared Knowledge

CRM, Knowledgebase, Past Actions & Experiences

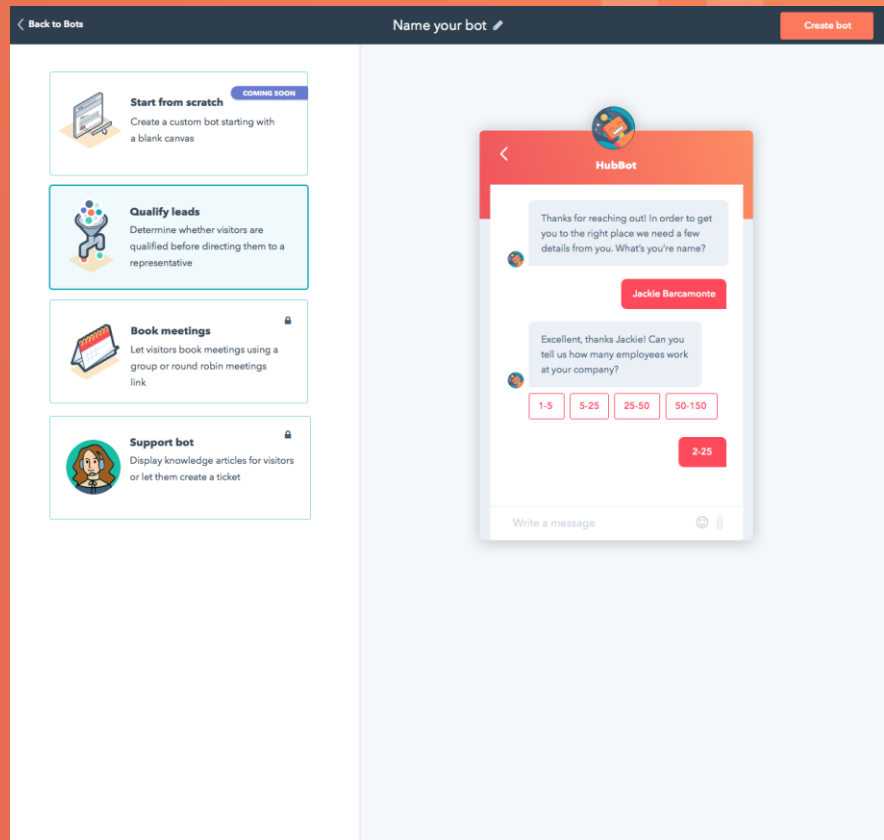
Visual Bot Builder



Fully Integrated



Starter Templates



Simple Integration



Thanks for checking out our pricing page. Let us know if you have any question on our products.



3 Laws Of Bots

1. A bot must be **simple to both create *and* use**.
2. A bot must serve a purpose, streamline a process, and provide a tangible net benefit to both the user and owner.
3. A bot must be aligned with the ideals and concepts of **Inbound**, while staying true to both Laws 1 & 2.

3 Laws Of Conversational

1. A channel must be **simple to both create *and* use**.
2. A conversation must serve a purpose, streamline a process, and provide a tangible net benefit to both the user and owner.
3. A strategy must be aligned with the ideals and concepts of **Inbound**, while staying true to both Laws 1 & 2.

Remember...

1. Conversational = Platform Level Thinking
2. Conversations (the tool) integrates with / relies on CRM, ServiceHub, and Channels
3. Bots can do SO MUCH MORE than a form – utilize this ability to maximize results
4. Your goal = **Build 1-1 Relationships. At scale.**

The background is a solid orange color. It features several geometric shapes: a small solid circle on the left, a large solid circle at the bottom left, and a series of concentric circles in the top right corner.

THANK YOU

#PARTNERDAY18

- The right message
- At the right time
- To the right person
- With the right information
- On the right channel
- Every. Single. Time.

Conversational Model:

The “script” of the conversation + required data + collected data

craft the narrative **first**.

build the bot **second**.

The least “technologically enabled” members of the team often have the most impact in the development of the conversational design

Develop the **conversational design around a process** (like lead qualification), **not a function** (like lead generation)

conversational design is an **iterative** &
collaborative process.

use a **holistic** approach



**Time To Live
(TTL)**



**Shared
Knowledge**



S.C.O.P.E

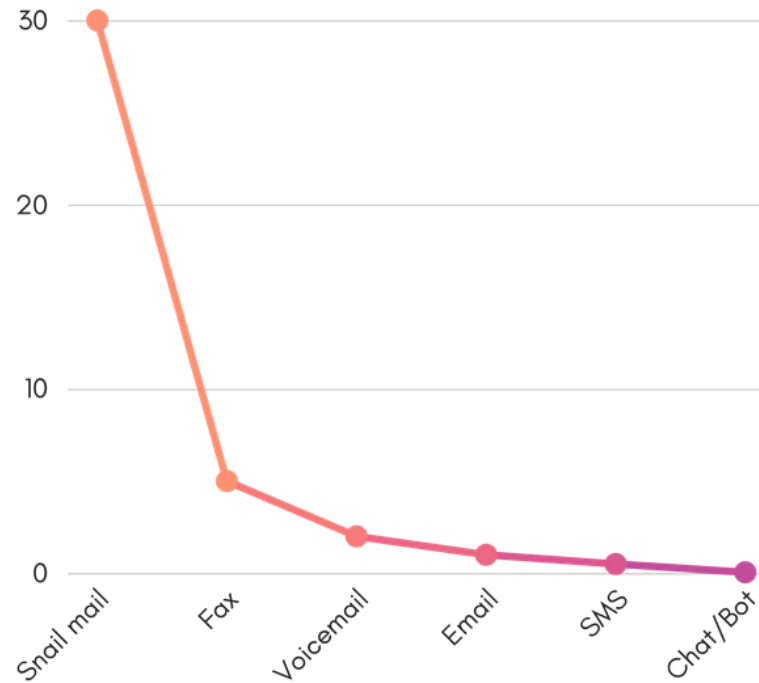


Time To Live

The amount of time that
someone will wait before they
expect an answer

Acceptable T.T.L

Days per channel





Shared Knowledge

The collective total of information available for use.



Standardize
Contextualize
Optimize
Personalize
Empathize

Standardize

Deliver the correct information.
Every time.

Contextualize

Understand - literally - how we got here.

Empathize

Deliver the emotionally correct response
before delivering the factually correct
answer

Optimize

Take advantage of a given channel's strengths, and mitigate its weaknesses.

Personalize

Leverage shared knowledge to make them
feel special.