

The Modern Guide to Live Chat for Marketing



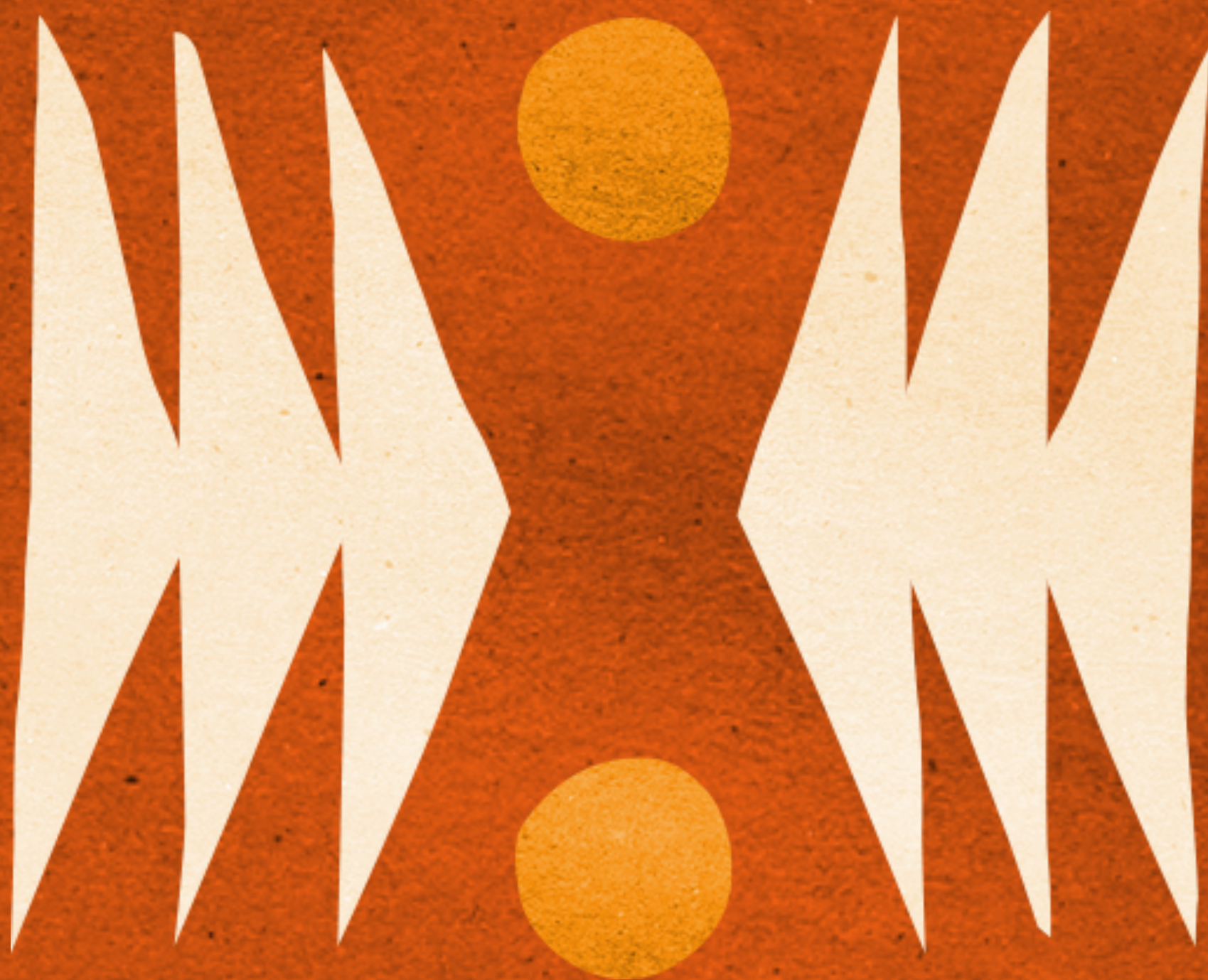
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01

Introduction



Live chat isn't just for support. If you think live chat is just for customer service, you're missing a trick. Live chat can play a key role in the lead generation machine, while conversational bot technology is transformative in its power to scale a personalized customer experience from acquisition right through to retention.

A recent [Facebook Nielsen study](#) of more than 12,500 consumers revealed that 53% of buyers are more likely to buy from a business they can message. What's going on?

A large portion of your website visitors who might buy your product simply aren't finding their way to a contact form or demo request. In fact, most of them are probably leaving without doing anything.

With live chat, the focus shifts from passively collecting a lead's information to proactively engaging people in conversation. Instead of forcing people to fill out static forms, go through an arduous marketing qualification process and wait for follow-ups (which might never come), live chat helps you engage with your visitors in real time, whether that's with human-to-human conversations and/or automated chatbot conversations. Either way, without a conversation these prospects would just vanish into thin air and be lost forever.

With that in mind, we've put together a handy guide to help you understand how live chat and chatbots can help you scale your marketing efforts.

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How does live chat improve conversion rates?

We analyzed an aggregate dataset of 20 million live chat messages sent through Intercom to demonstrate the potential for [live chat as a channel for converting visitors](#) and driving actual revenue for your business.

+82%

On average, website visitors are 82% more likely to convert to customers if they've chatted with you first.

+50%

Just one reply can increase the likelihood of conversion by 50%; one more reply makes that visitor 100% more likely to convert.

+45%

Visitors are actually 45% more likely to convert on pages other than the homepage.

+36%

Our data shows that conversations with bots convert 36% better.

4x

People are four times more likely to respond to a message containing an emoji.

13%

Website visitors who chat pay 13% more than those who don't, according to our data.

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Best practices for live chat marketing

Start with a lead-in question

Messages like: “Hey 🙌 Happy to help” add little value. Instead, ask a specific question like “What communication challenges does your company face?” Always prompt people to start a conversation with you.

Target high-intent pages

Be selective with where you place your live chat widget. Placing it on landing pages where the intent to purchase is high will improve the quantity of high quality conversations coming in. For most SaaS companies – including ours – the most effective place to start is your pricing page.

Use real names and faces

Would you rather chat with a faceless company logo, or “Jess from Intercom”? Use real names and photos in your live chat tool, especially when initiating conversations. Although our instinct is often to hide behind a logo or company name, meaningful conversations occur when a visitor sees you as a human being, not a faceless, nameless corporate logo.

Monitor and test often

Just as in real life, if your opening line isn’t working, it’s time to adjust. Ideally you’re A/B testing all your messages, perhaps comparing lead-in questions, calls-to-action, emoji or no emoji, etc. A successful message will see high reply rates. Always be testing and learning.

Use bots often and transparently

As anyone who’s ever manned a live chat tool will tell you, you’re often repeating yourself: “What’s your email?,” “What’s your company size?” or “Here’s a doc that answers your question.” Use chatbots to handle the repetitive, mindless aspects of a conversation. This allows your human teammates to do what humans do best: listen, empathize and understand intent.

Set measurable goals

Like any marketing channel, you'll want to optimize your live chat channel and chatbots regularly. When setting benchmarks for the first time, you can use an open rate or click rate from a traditional medium like email, and over time start readjusting your goals and benchmarks accordingly.

Drive actionable outcomes

Using a chatbot on your site? Too often, we treat chatbots like dressed up forms. We expect leads to answer a barrage of questions but once the bot is done, we leave them with nowhere to go. Always conclude your chatbot interaction with a relevant action, whether that's helping your lead register for a webinar, sharing a useful piece of content, starting a trial, etc.

Within the [Intercom App Store](#), there are over 100 apps you could use to encourage an actionable outcome in your conversation. For example, you can invite visitors to your webinars using the [Zoom app](#), share your latest news or articles with the [Content Showcase app](#) or let your visitors set up a demo with our [Get A Demo app](#), and more.

Provide an escape hatch

While we believe chatbots are the future of marketing, we also understand that sometimes people just want to talk to people. Always offer a human fallback option allowing your leads to signal that "I'd rather wait and talk to a person. Make this robot thing go away." Bots should help your leads get what they need faster, not become a barrier.

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What marketing bots should you build?

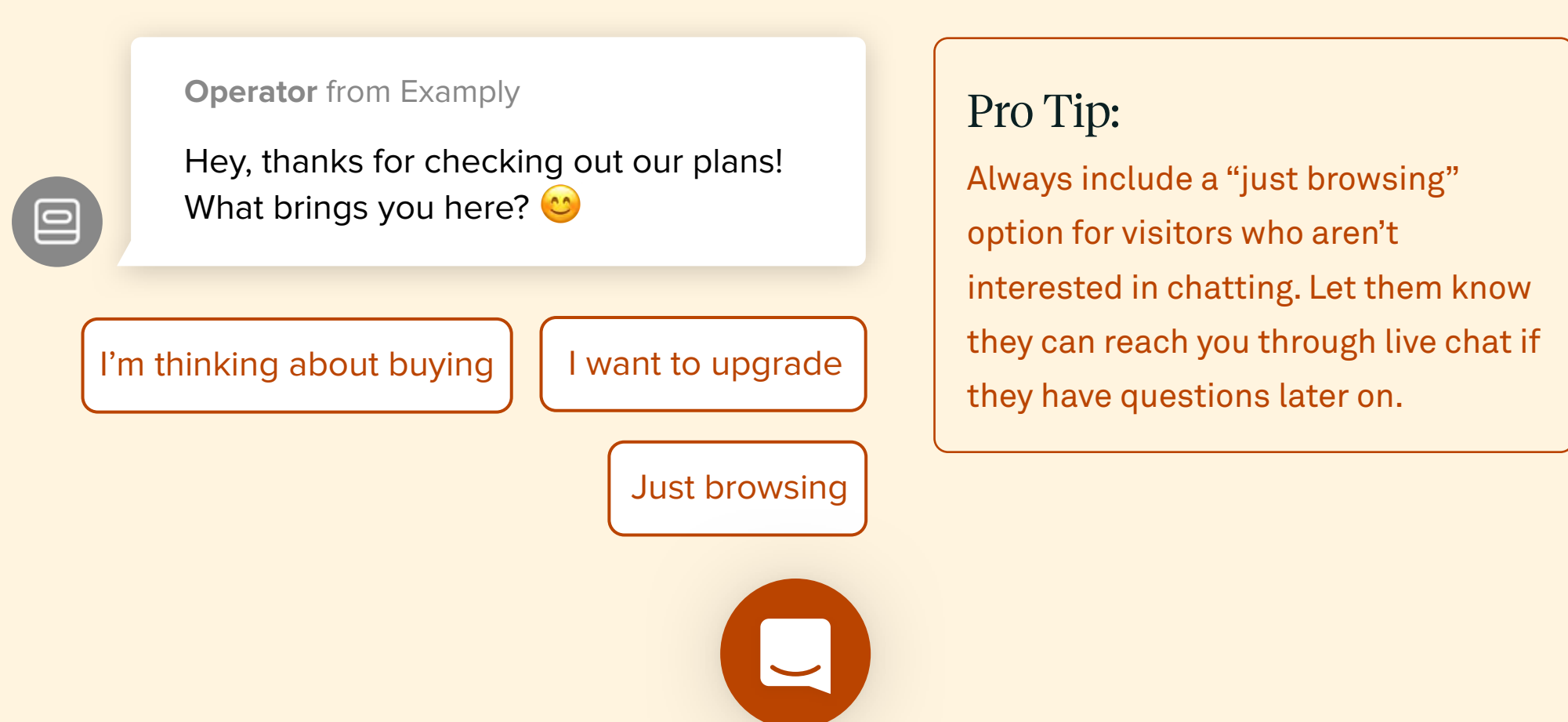


Live chat is the ultimate way for marketers to personalize and engage leads, but does it scale? Fortunately, today's chatbots are sophisticated enough to help marketers scale this personalized approach, 24/7. Just like targeted emails, chatbots can be customized to match a brand and achieve specific goals. Here are a few of our favorite examples:

1. Pricing page bot

The single most impactful place to target high-intent visitors is your pricing page. That also makes it the perfect place to add a chatbot. Proactively reach out to visitors with a friendly message and help them take the right next step.

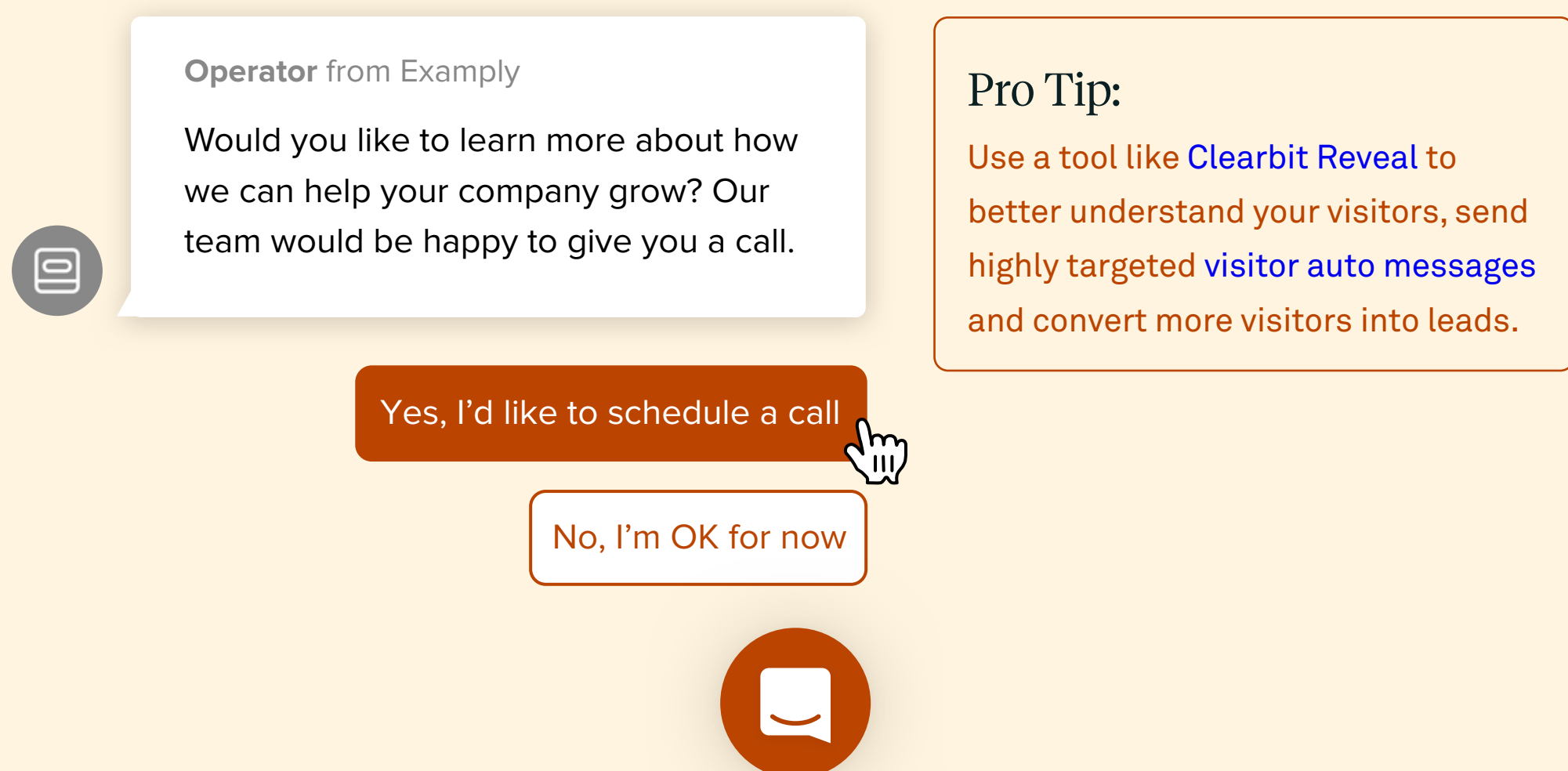
It might seem like a good idea to dial up your bot's aggressiveness in chatting with leads on this page. After all, your visitors are sending you clear buying signals. Resist that temptation. If someone's not ready to buy, sending too many follow-up questions will feel spammy and only encourage them to tune out.



2. Lead capture bot

Your visitors' interest in you is at its peak when they first land on your website, so this is the perfect time to engage with them. Not after they've left a page idle for 10 minutes.

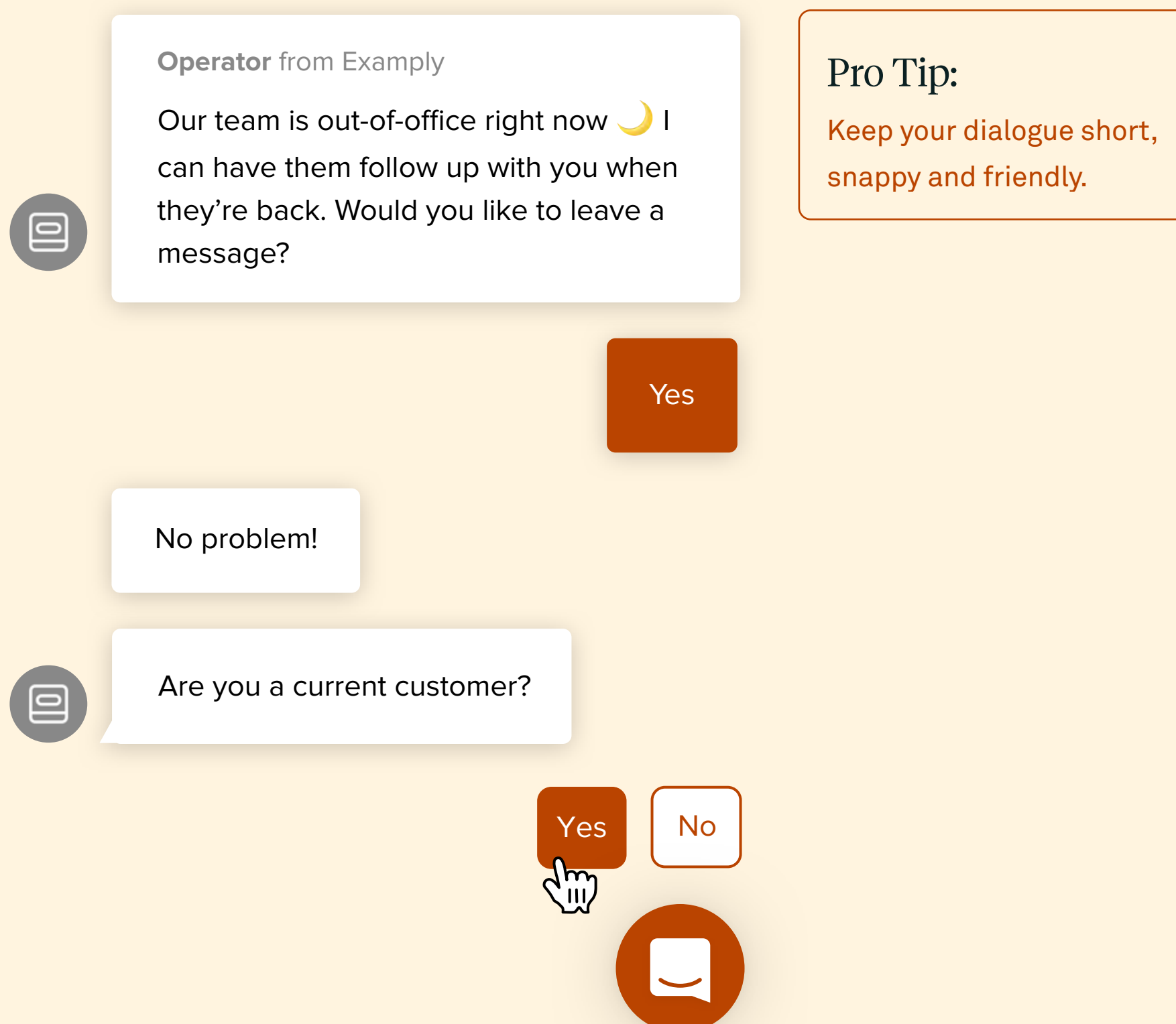
The most effective way to capitalize on that opportunity is to put a chatbot in front of your website visitors and engage them in real time. This bot takes swift action by alerting you when new leads show up on your website, capturing their contact details and routing them to the right sales rep for fast follow-up.



3. Out of office bot

Give yourself a break! With this bot, you can capture leads 24/7 whether you're fast asleep or snorkeling in Aruba. You can also schedule this bot to trigger at certain times and frequencies if you know when you'll be offline, or set it to only trigger for certain type of leads through using our Clearbit integration.

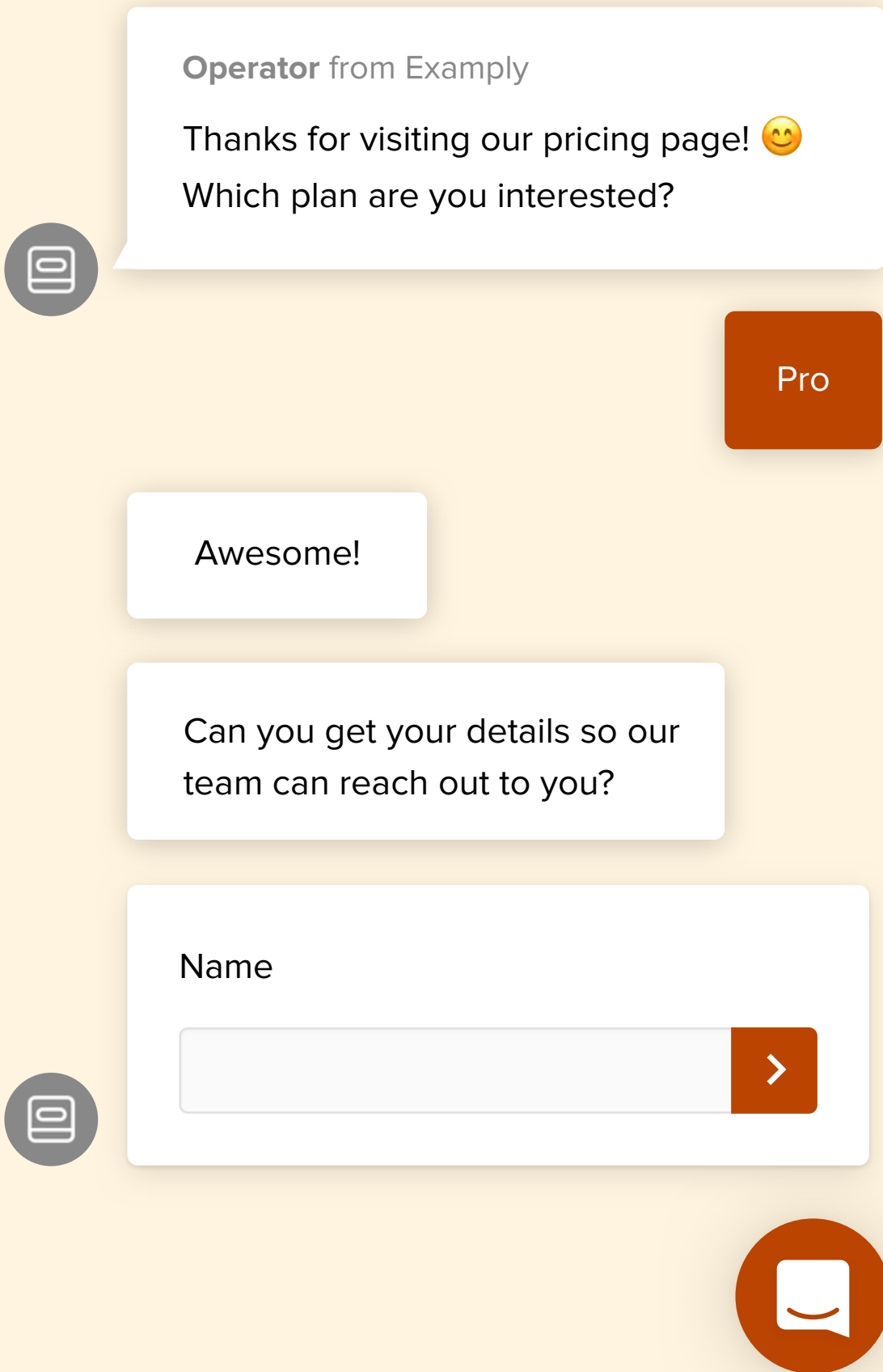
When this chatbot gets triggered, a visitor is prompted to leave a message or continue browsing. Either way, the visitor is tagged as a lead if they interact with the bot. Why? Many chatbots treat those who are "just browsing" as Dead on Arrival. We always encourage companies to provide these leads with something of value, such as a piece of high-quality, ungated content or direct them to your FAQs. And then get out of their way, so they can keep browsing, while leaving your door open for a message. Just because they're not super engaged now doesn't mean they won't be later.



4. Product recommendation bot

The best time to deliver a personalized recommendation is when a visitor is on your site. No matter how simple or beautiful your website is, it can still be a cognitive overload for website visitors to figure out if your product is right for them. The truth is, if they don't find what they need, they'll get bored, leave and never return.

Nothing beats a 1:1 conversation with a human when it comes to getting personalized product recommendations, but our product recommendation bot comes pretty close and it only takes minutes to build in Intercom. You can set up this chatbot to deliver a personalized recommendation after answering just a few simple questions.



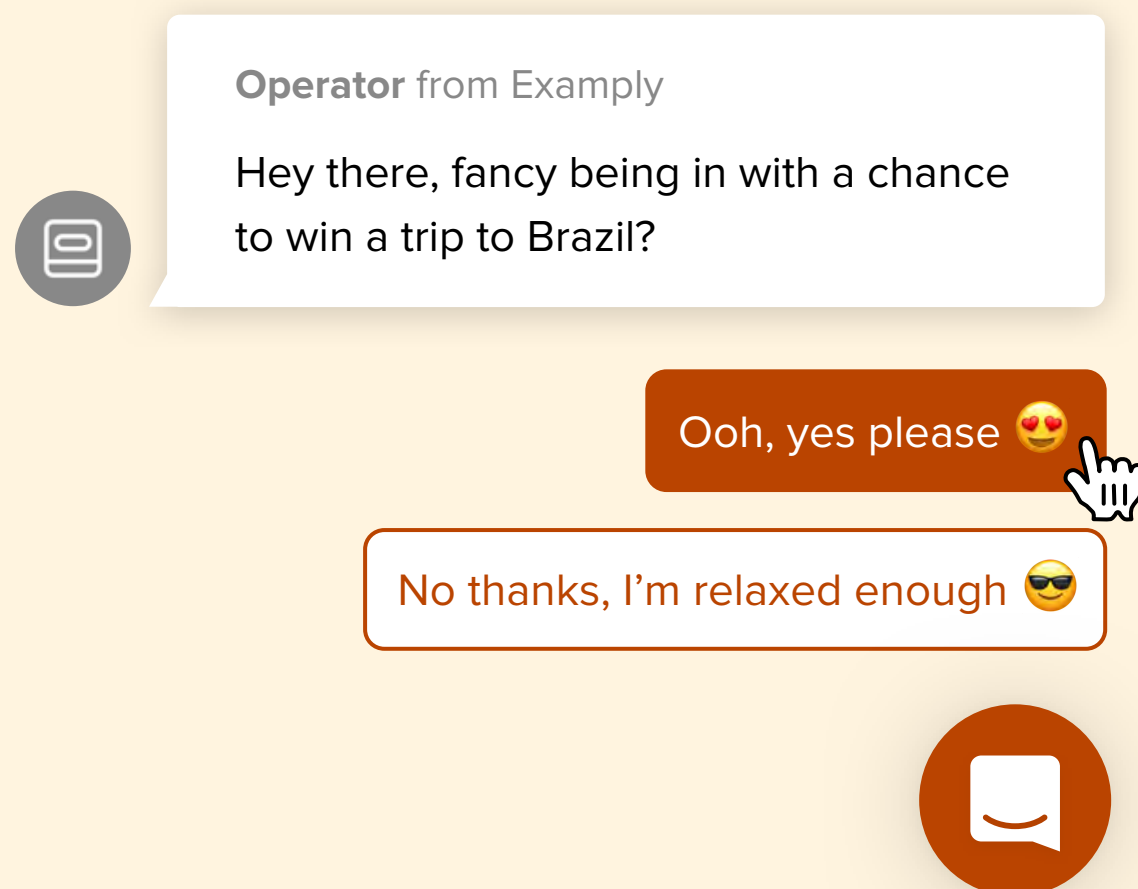
Pro Tip:

Not everyone's in the mood to play, so always give users an easy and early chance to opt out of chatting further. Even if they do opt out, leave your door open by responding with "Feel free to let us know if you have any questions."

5. Competition bot

You know those marketing emails where you are entered into a cruise competition if you hit ‘reply’ with your telephone number and address? The competition bot functions in the same way, except it targets people on your website and works the competition in real time (read: way more engaging).

One of our favorite ideas works like a quiz show. The chatbot starts by asking visitors a trivia question. If you get it right, you’re entered into a sweepstake and asked to enter your email address. If you’re close, or get it wrong, the chatbot offers a consolation discount code on the spot. This might sound trivial, but who says you can’t make lead capture more interesting?



Pro Tip:

This is a fun and interactive way to capture more leads but it's also important to ensure your competition complies with [GDPR regulations](#) before setting your bot live.

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OutSystems: How live chat and Custom Bots are driving engagement

Earlier this year, we announced the release of **Custom Bots**, allowing you to create completely **customizable** chatbots to automate all sorts of **user journeys** on your website, in minutes.

Our customers are already seeing value from implementing Custom Bots on their website, by personally engaging new visitors with video, automatically qualifying leads, and nurturing new trial users to paid plans.

Here's a deeper look at how one of our customers is using live chat and Custom Bots to grow their business:



Paulo Tavares leads the product onboarding team at OutSystems where his main goal is to help new customers make the most of their product during the trial phase, and drive them towards purchase. Onboarding is especially important at OutSystems because it's a technical product, so new users may be unfamiliar with how to take full advantage of what they have to offer.

Prior to using live chat or Custom Bots, supporting these new customers and providing them with a personalized onboarding experience took a lot of time for Paulo's team. They were using targeted auto-messages to prompt user interaction, but given the on-demand world we live in and the expectation for 24-hour connectivity, OutSystems needed a solution that allowed them to be available 24/7.

“There's a different expectation of response time and quality of response per channel. In this day and age, having live chat is both a very effective and straightforward manner for us to interact with our users. But people also expect quick and high quality responses. As a result, we were experiencing issues of scale as we didn't have 24-hour coverage,” says Paulo.

Paulo and his team needed an automated way for users to help themselves quickly and get the resources they needed to get started. At the same time, it was also important to find a way to identify potential high value customers in order to provide them with a more tailored experience, with a human touch.

For these reasons, OutSystems decided to use Custom Bots to greet customers during the initial user experience where the main goal for the bot is to ask some early qualification questions to help better define the customer.

“In three weeks, we've seen a 50% growth in engagement with the Messenger.”

The two main questions that guide the type of onboarding experience and resources users will receive are:

1. What is your use case?
2. Are you working with a team or by yourself?

Depending on the use case, the bot can then automatically send the most relevant product tutorials. And by looking at the team sizes, Paulo and his team can prioritize who they speak with, and offer more premium onboarding support to potential high-value customers in order to progress them down the purchasing funnel.

Most importantly for OutSystems, setting up Custom Bots was simple and quick, allowing the team to iterate and improve their bot as they learned and collected more engagement data. “The biggest advantage of Custom Bots is that we are able to design, implement and iterate faster on our entire end-to-end customer experience without relying on our product or website team to make changes. We can launch a new version of our bot in minutes to quickly test parts of our customer journey.”

The initial results from setting up just one Custom Bot have been impressive.

“The automation capabilities of Custom Bots help us use live chat effectively at scale. We can now connect with users in a timely, personalized and meaningful way no matter the volume of traffic. In just three weeks with Custom Bots we’ve seen a 50% growth in engagement with the Messenger and we are moving 16% more users through the journey because we are delivering the right resources to the right people at the right time,” Paulo says.

Interested to see how live chat can play a key
role in lead generation for your business?

Learn more at [**intercom.com/live-chat**](https://intercom.com/live-chat)



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