

The Complete Guide to Using Chatbots for Sales

Acquire, qualify and convert leads at scale.



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01

Introduction

Not so long ago, selling anything meant lengthy forms and multi-part email chains. It could take weeks to schedule a single meeting and even then, there was no guarantee your prospect would show up. Today, buyers live in an on-demand world, and they'll settle for nothing short of a real-time response. That's made one channel more effective than ever: **live chat**.

But the need for a personal, real-time buying experience has exposed key human limitations. As sales people, we face some unavoidable realities – like our need to sleep, our dislike of repetitive tasks and our inability to multitask conversations.

Modern-day chatbots allow you to push past all of that. Bots are always on, fully customizable and infinitely scalable so you can get prospects what they need, immediately. They're good for your business's bottom line, too.

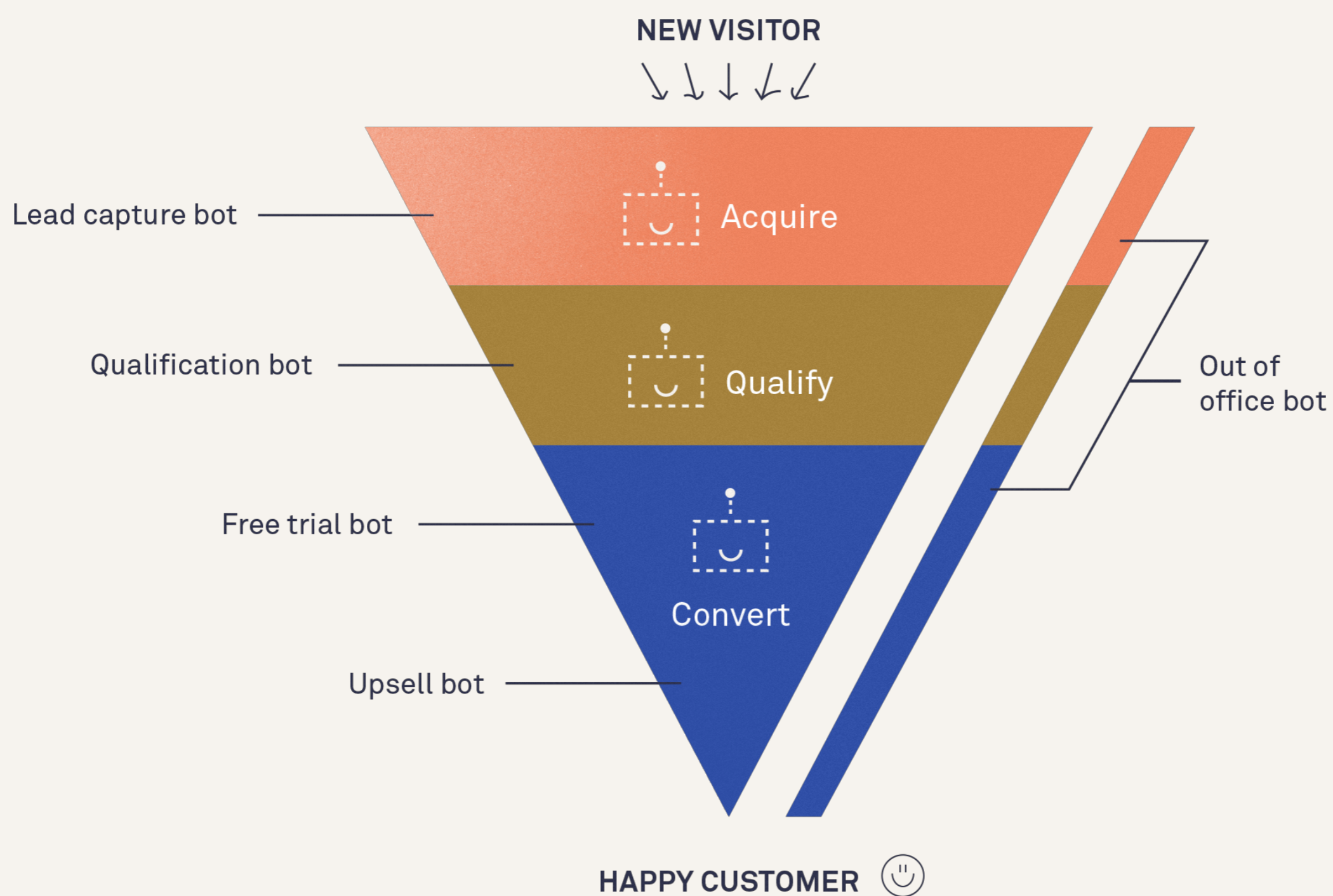
Interactions with Intercom's bots **increase conversion by 36%**, likely because bots accelerate routine tasks like capturing email addresses and answering simple questions.

In this guide, you'll learn how to use chatbots to acquire, qualify and convert leads at scale. With its actionable tips and templates, you'll be launching your first bot in no time.

02

When you should use chatbots

Live chat is often the first place that modern buyers look to connect with a business. But as sales people, we have real limitations – we need to do things like eat, sleep and walk our dogs. 🐶 With chatbots, you can acquire, qualify and convert leads at scale, 24/7. Here are a few examples of sales chatbots that you'll learn about later in this guide and where they fall in the sales pipeline.



03

Best practices for using chatbots

When implemented correctly, chatbots can make your sales team more efficient and productive. But it's not always clear what makes a bot successful. Should it be friendly and transparent? Should it present your leads with many options or just a few? Here are a few best practices to help you create the perfect bot for your business.

Don't pretend it's a human

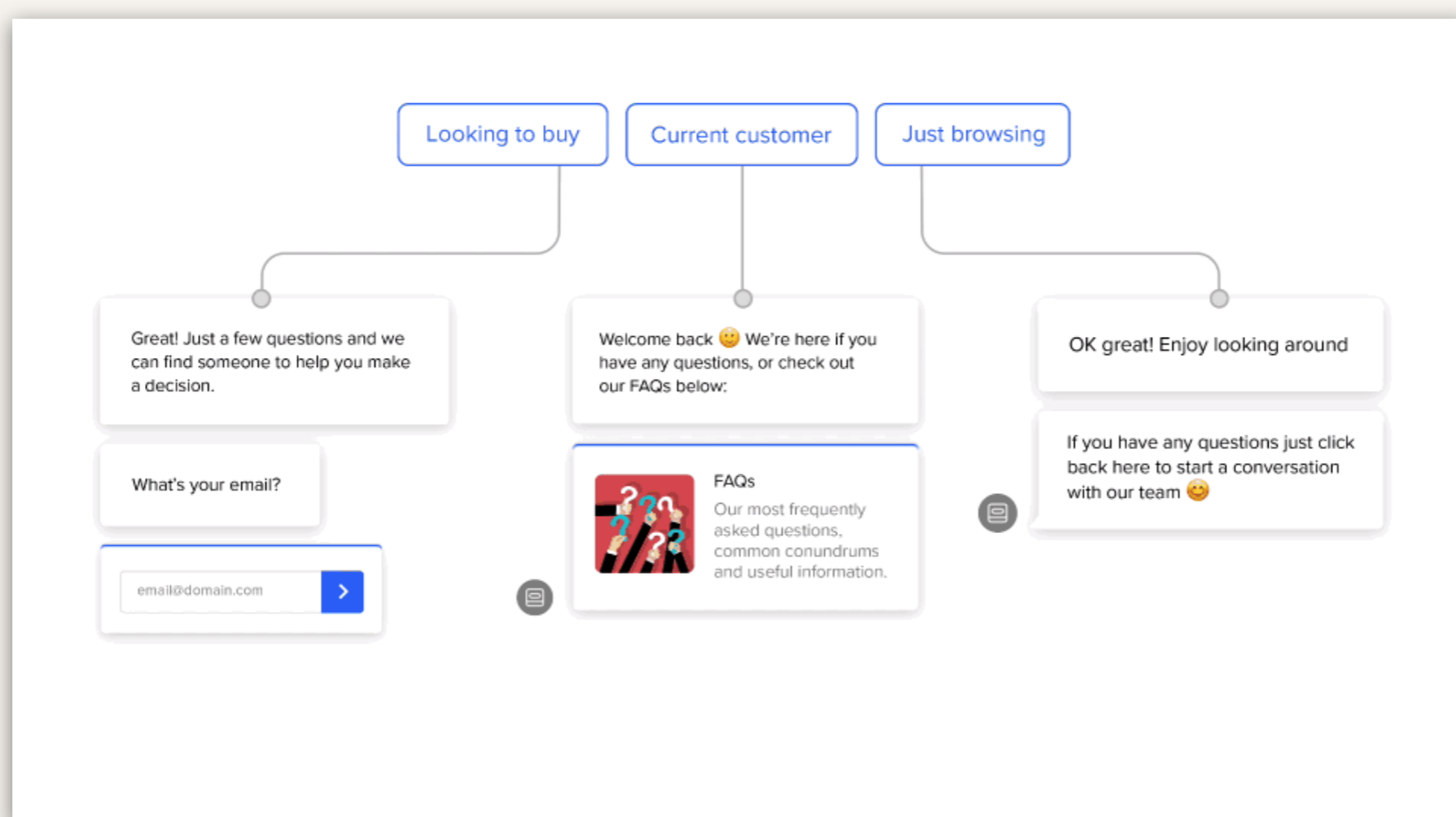
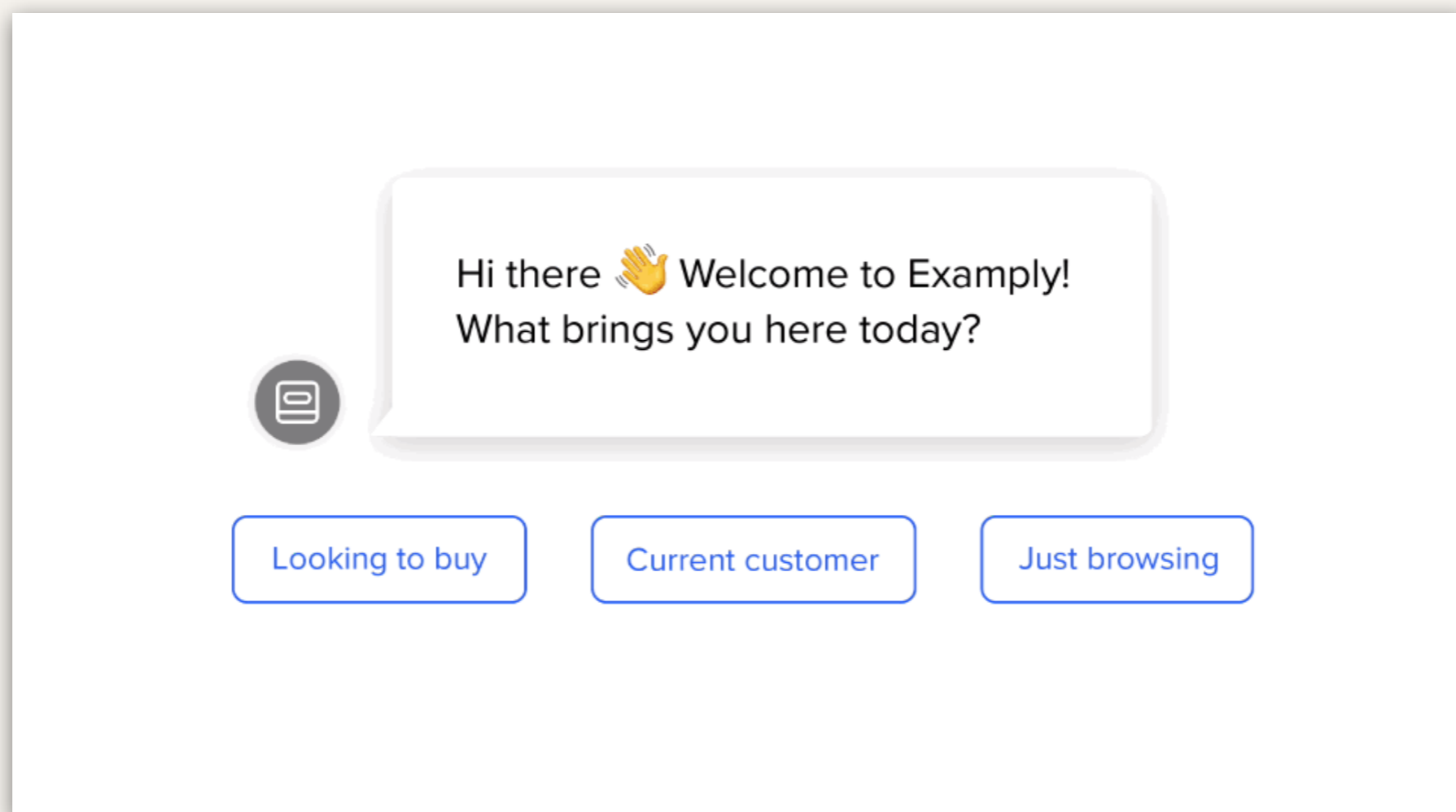
Playing bait-and-switch with your leads can set the wrong expectation. If your lead thinks your bot is a person, they'll expect it to respond like one when it can't. That doesn't mean you can't give your bot a personality or **customize it** to match your brand. But "Jenny from Examply" shouldn't be ExamplyBot in disguise.

Open with a value statement

Imagine starting a conversation by saying, "Tell me your annual revenue." Like any other interaction, your chatbot's welcome message should provide context before asking anything from your leads. That might look like: "Hey 🙌 We helped our friends at **Copper** generate \$36K in new revenue. Curious to see how we can help your company grow?"

Personalize the experience

Not everyone who visits your website will want to do the same thing. Some will be happy just to browse, while others might arrive with the goal of chatting to sales. Your chatbot should send leads down different paths based on who they are, what they need and how valuable they are to your business.



Keep it incredibly simple

Chatbot interactions should be short and precise. If your website visitor wants to schedule a demo, the bot should quickly collect their information, help them book a meeting and then get out of their way. In this case, you could have your chatbot insert the [Google Calendar app](#) to automatically schedule time with the right sales rep and skip the back and forth over email.

Drive actionable outcomes

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, book a demo or buy a new subscription. Remember, prospects don't visit your website to chat; they come to get things done.

Optimize for engagement

Just as in real life, if your opening line isn't working, it's time to adjust. Ideally you're A/B testing your chatbot, perhaps experimenting with targeting, calls-to-action, reply buttons, etc. Always be testing and learning. An effective chatbot message should see an engagement rate, measured by first click, of at least 8-12%.

Provide an escape hatch

While we believe chatbots are the future of sales, don't get us wrong – we totally get that sometimes, people just want to talk to people. Always offer a human fallback option allowing your leads to express, “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.

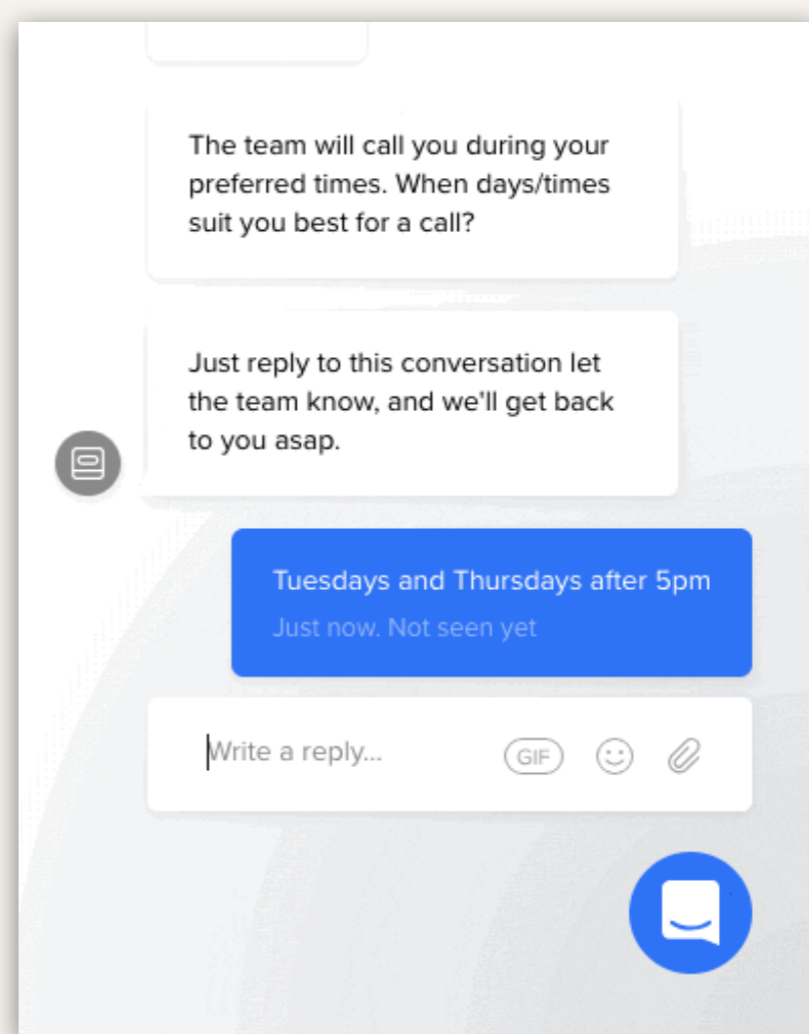
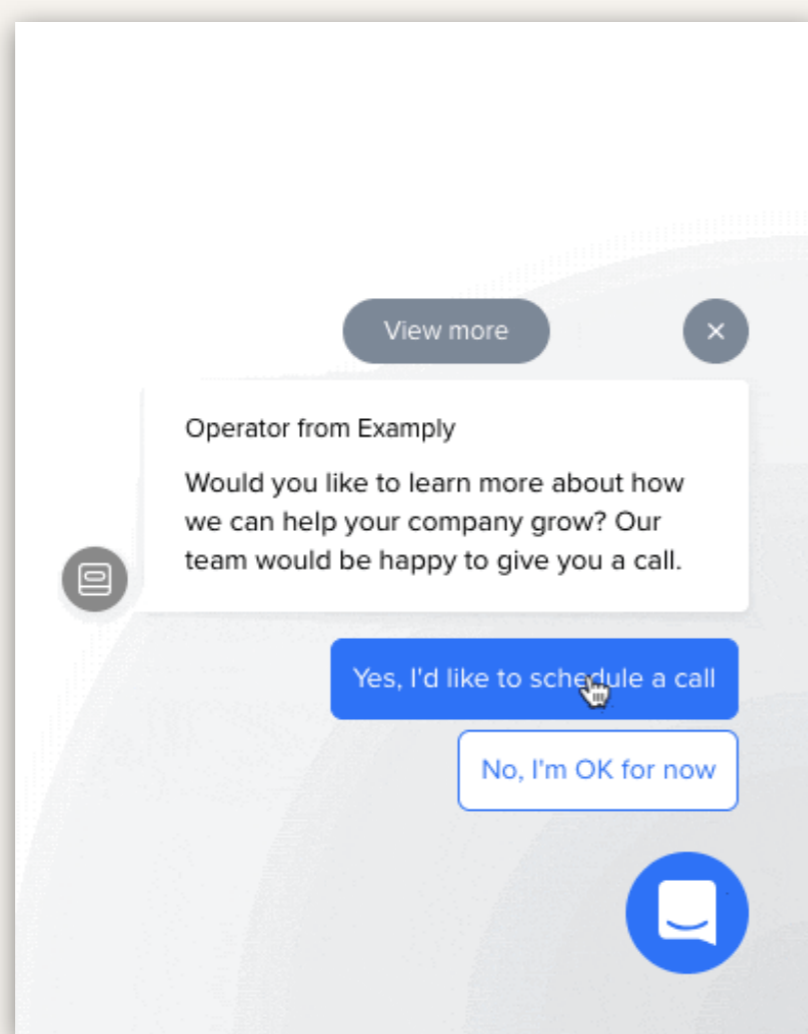
04

What chatbots
should I build?

Lead capture bot

When a visitor first hits your site, their interest in learning about you is at its peak. Not 20 minutes and 20 websites later. If you think modern buyers are happy to fill out a form, wait for you to do your research and then wait for a follow-up email, it's time for a reality check.

A more effective approach 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.



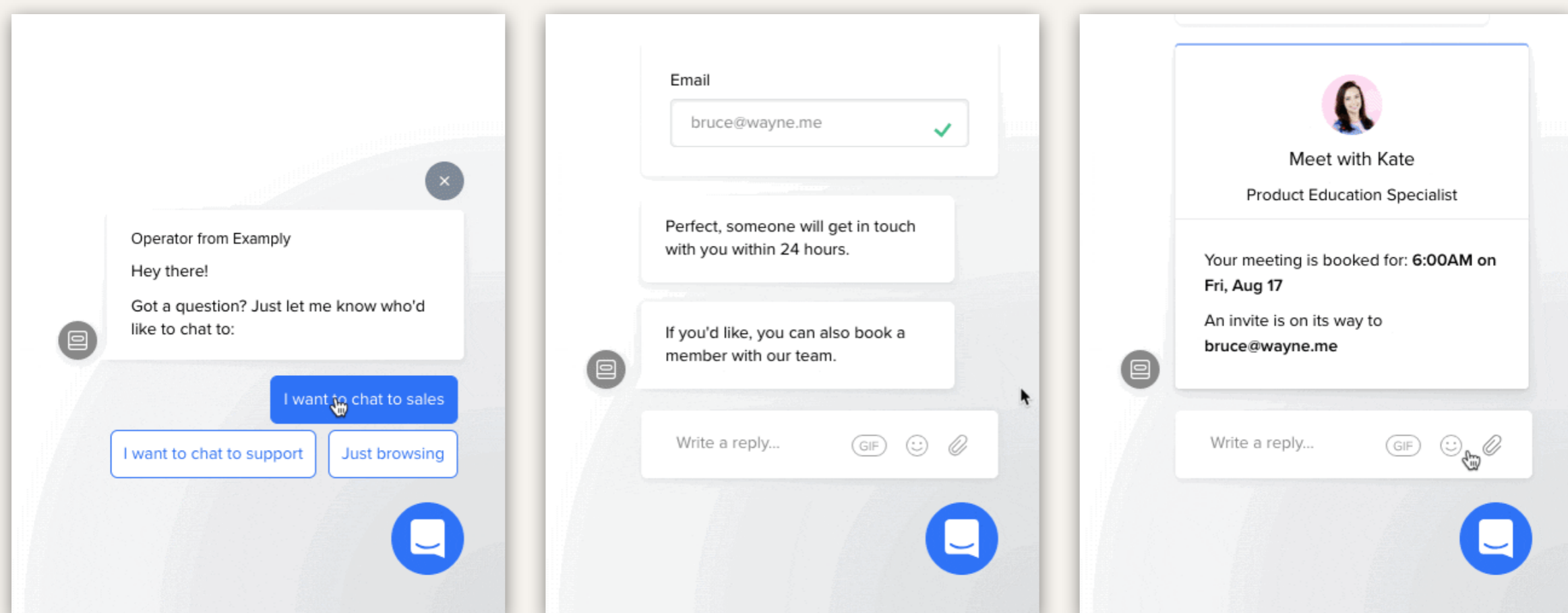
Pro-Tip:

Use a tool like [Clearbit Reveal](#) to only target website visitors that meet your ideal customer profile. You can leverage criteria like company size, revenue, sector and more.

Qualification bot

Live chat can open up a fast lane to your hottest leads, giving them a direct line to sales. But not every website visitor is going to be worth your time. So how do you identify the ones that are a good fit without creating extra work for your sales reps?

Use a chatbot to automatically qualify your website visitors using criteria like company name, number of employees and email address. Then have your bot route the visitor to the team best suited to help, whether that's sales, support or self-serve. Automating this simple step **reduced our SDR team's inbox by 50%!**



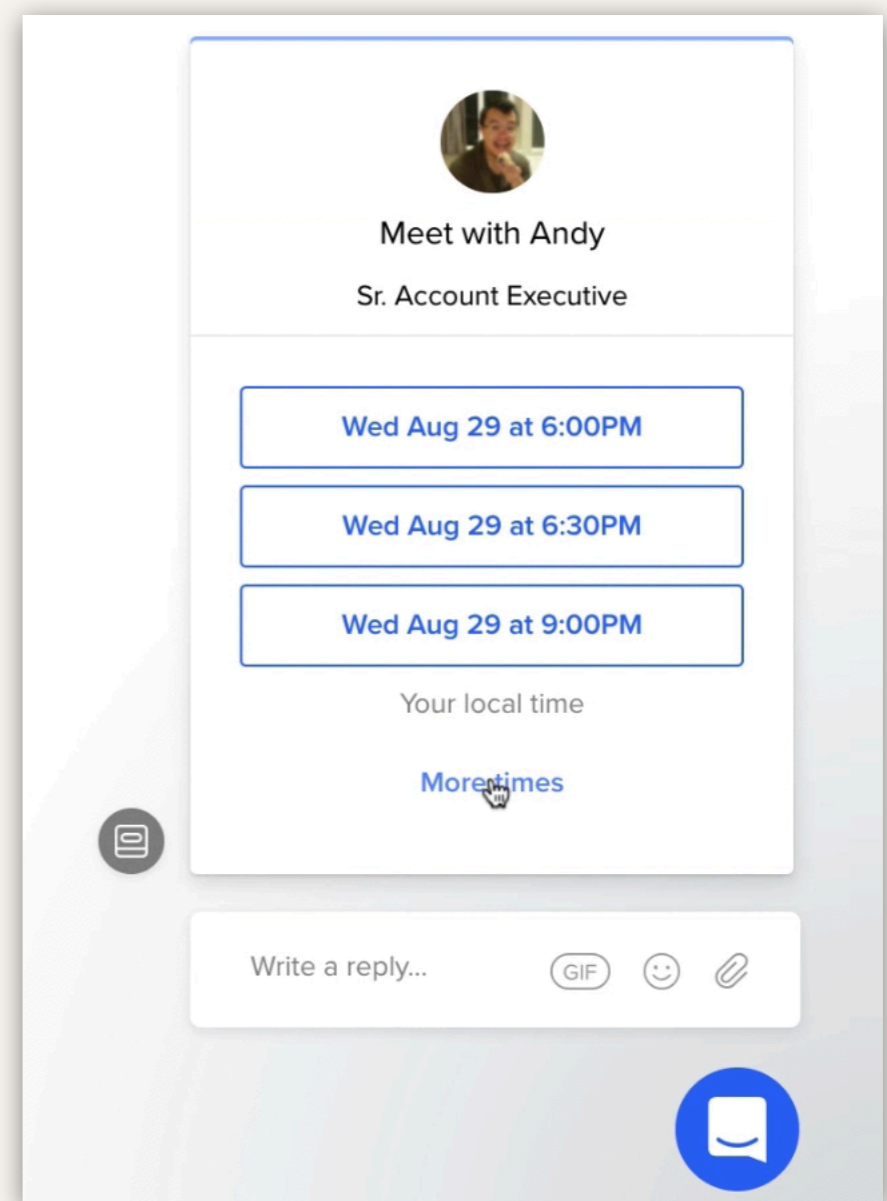
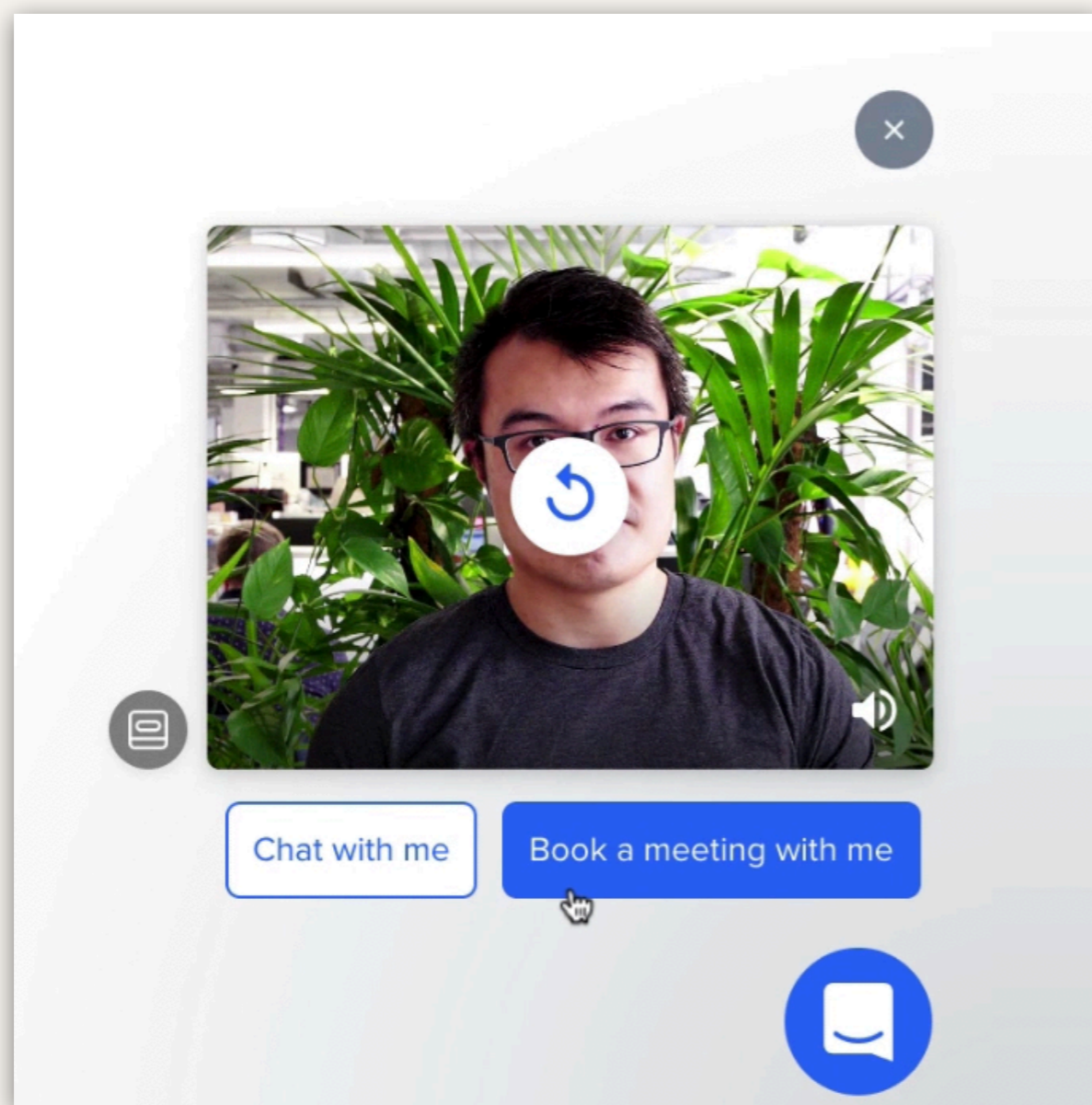
Pro-Tip:

Always include a “just browsing” option for visitors who aren’t interested in chatting. Let them know they can reach you through live chat if they have questions later.

Free trial bot

The fact that SaaS products are so easy to evaluate and buy is a double-edged sword. On the one hand, it's easier than ever for people demo your product, but on the other, people can leave as fast as they joined. That makes it incredibly important your leads get the most out of their free trial.

Use a chatbot to proactively reach out to trialling leads. A friendly message and an offer to help can go a long way. For your high-value accounts, consider offering a direct line to their sales rep and for smaller accounts, access to relevant guides and tutorials.



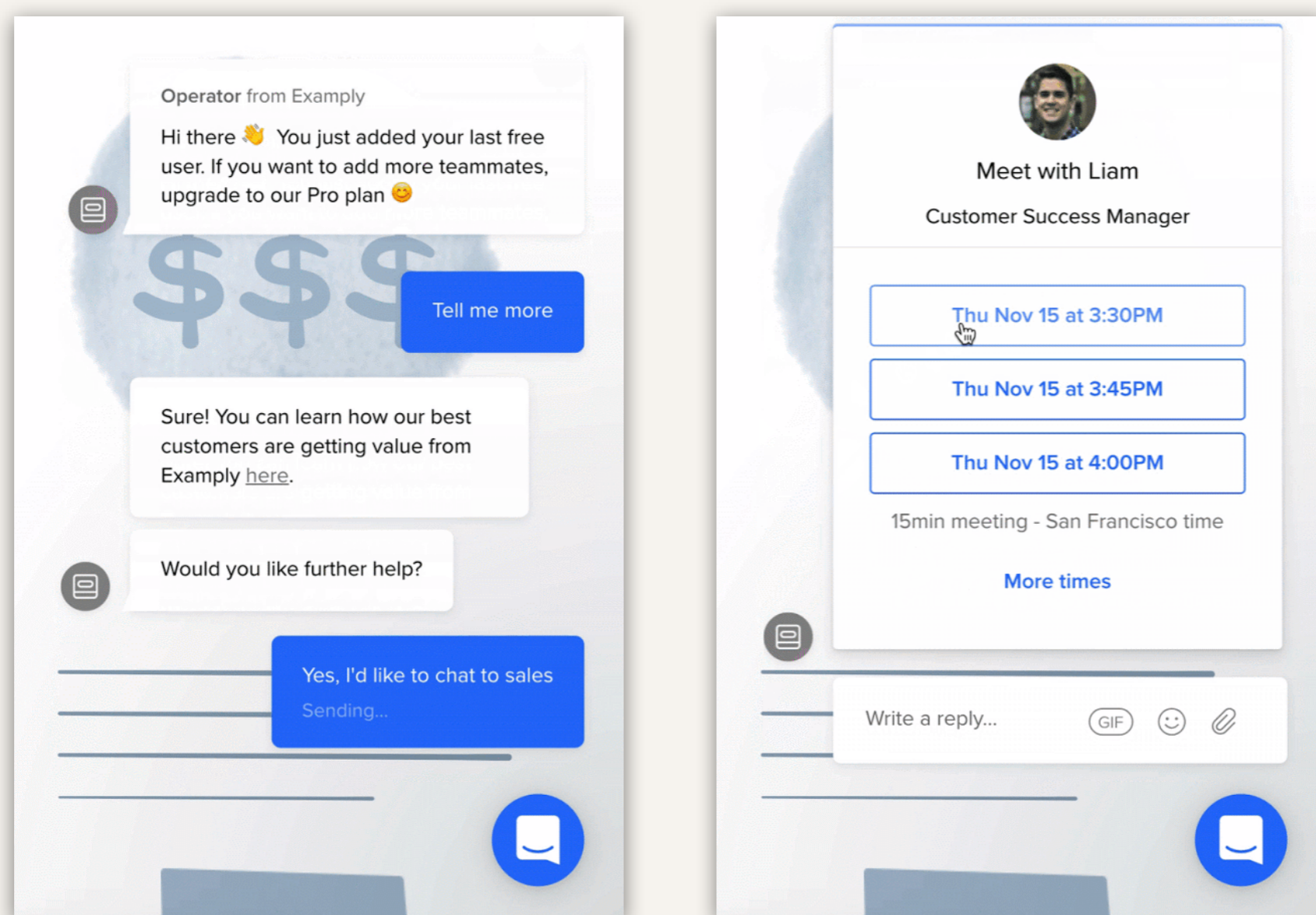
Pro-Tip:

Add video to your chatbot to personally welcome and engage your leads. Our customers who combine video and bots see 4x the typical engagement rates of email.

Upsell bot

Sustainable, high-growth businesses are built on growing your existing customers, not just capturing new ones. It's anywhere from **5x to 25x more expensive** to acquire a new customer than to invest in an existing one.

The best time to upsell is when a customer is active in your product and seeing value. Use a chatbot to grow your business automatically by engaging customers with personalized upsell messages. The more targeted your message, the more effective your chatbot will be.



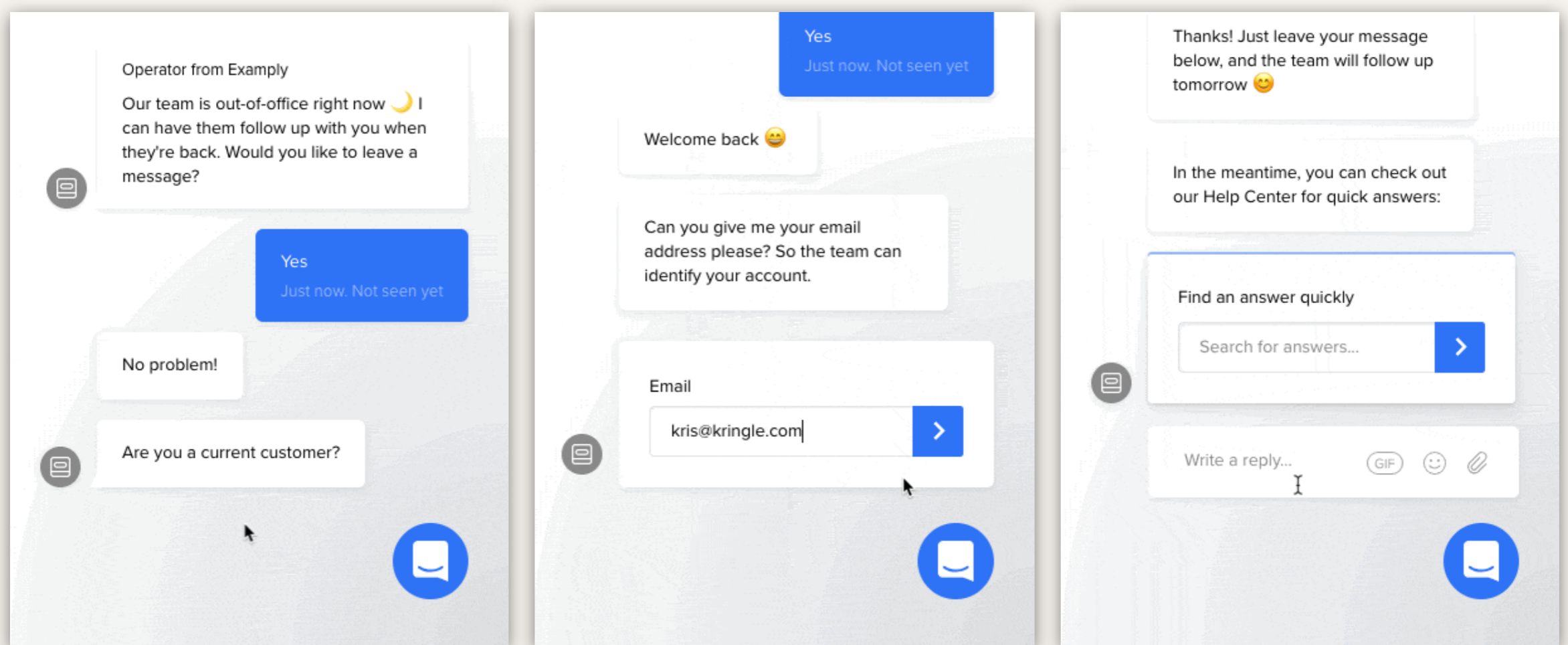
Pro-Tip:

Time your messages to coincide with key events like checking out your upgrade page or hitting a plan limit. Remember, upselling should make sense for you *and* your customer.

Out of office bot

Just because you're not working, doesn't mean your chatbot shouldn't be. Whether you're fast asleep or snorkeling in Aruba, you can use a chatbot to engage leads 24/7. Schedule it to trigger at times when you'll know you'll be offline like after business hours or on weekends.

This chatbot keeps leads warm by setting expectations for when you'll reply and following up with helpful next steps, like letting visitors leave a message or sharing a piece of high-quality content. Even if your visitor is just browsing, your chatbot should still tag them as a lead. They might not be super engaged at first, but they could be later.



Pro-Tip:

For visitors who aren't customers yet, have your chatbot qualify them and route them to your sales team. Encourage your sales reps to follow up as soon as they're back.

05

Mailshake's
Sujan Patel
on chatbots
for sales

The promise of chatbots is attractive: enable businesses to grow faster at scale. And today's top sales teams aren't waiting to get started. They're using chatbots to accelerate the buying process and deliver immediate value to their prospects.

Just ask [Sujan Patel](#), an industry expert who's built his career helping companies grow. As the co-founder of the agency Web Profits, he's led marketing strategy for Salesforce, Intuit, LinkedIn and more. He's also growing his own handful of SaaS companies, including Mailshake, a cold email outreach tool.

We sat down with Sujan to ask him about the most effective ways he's seen chatbots being used.

“A chatbot can be used to help in virtually every conceivable way and metric to grow your business.”

- Sujan Patel



Listen to our full conversation with Sujan Patel on the [Inside Intercom podcast](#).

Interested to see how you can use chatbots
to grow your company's revenue?

Learn more at intercom.com/bots-for-sales



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