

# CONVERSATIONAL SALES AND MARKETING *STARTER KIT* 6

Chatbots to help  
Trailblazers get  
the most out of their  
Salesforce data



Purpose-built for Salesforce

1

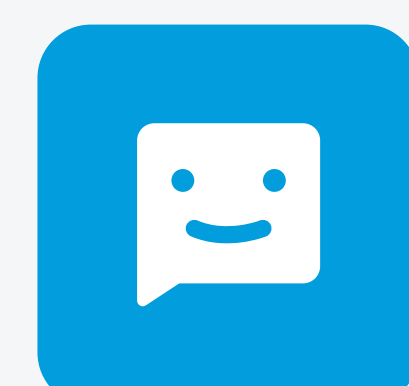
Strategy No. 1

# Capture More Leads with Chatbots

In a hurry?  
Get the TL;DR.



Use chatbots instead  
of forms



Chatbots can  
capture email  
addresses and push  
to Salesforce



Enrich prospect data  
from the email  
capture

## The Strategy

Use a chatbot to capture email addresses to help you generate high-quality leads and book sales meetings around the clock. As soon as you grab an email address and ask qualification questions in the chat, you can immediately push that data to create a lead in Salesforce. You can even let qualified leads book a meeting right in the chatbot experience!

### Chatbot

Before we connect you with our team,  
can I please have your email address?



LEAD CAPTURED IN SALESFORCE



### Salesforce Lead

Name  
Damien Roberts

Title  
CMO

Company  
Netflix

Status  
Working



Strategy No. 2

# Use Chatbots to Fast-Track Form Fills on High Value Pages

In a hurry?  
Get the TL;DR.



Invite VIPs to bypass the form and talk directly with your team



Use data from a form fill to have a personalized conversation on the thank you page



Push data captured from chat straight to Salesforce

www.company.com/pricing

Please fill out this form

Name

Email

Company name

Company size

Industry

**Skip the line!** 🙌

Welcome, Netflix team! We're standing by and ready to chat, right now. To get started, please provide your business email address...

## The Strategy

The industry average for follow up after a form fill is 42 hours. If you need to boost form fill conversion rates and improve follow up time, use the Fast-track Form Fills Strategy.

Add chat on your high priority form fills pages and give qualified visitors (not everyone!) the option to "skip the line."

Or, you can strike up a live conversation on thank you pages as soon as someone submits a form. Use data from the form fill to instantly route the conversation and personalize greetings.

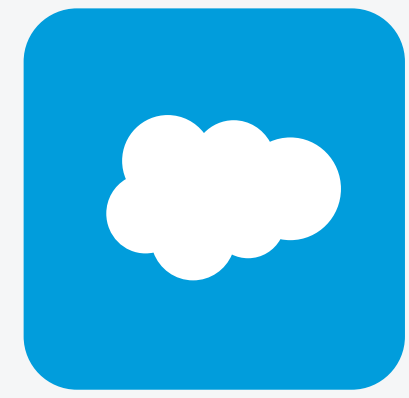


# 3

Strategy No. 3

## Personalized Experiences for Known Salesforce Leads and Contacts

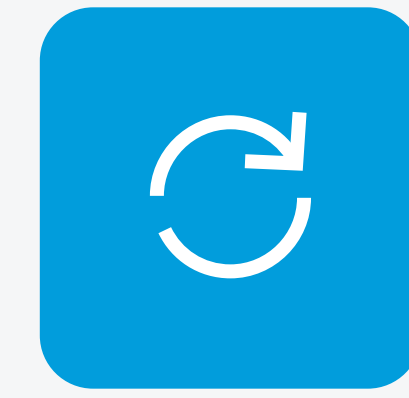
In a hurry?  
Get the TL;DR.



Surface Lead and Contact data the second a prospect lands on your website



Use Salesforce data to have a personalized conversation



Get your hard-earned marketing audience into a sales cycle

### The Strategy

When Leads or Contacts arrive, automatically surface relevant information in your conversational sales and marketing platform. You can show a Lead or Contact's title, company name, and employee count.

Then, pair this Salesforce data with your conversational sales and marketing data. For instance, you can see how much time your Lead or Contact has spent on your website, their browsing history, and which page they're looking at right now.

Your Known Leads and Contacts strategy should start with a personalized greeting, like greeting them by name, and then quickly serving up relevant content to align with their buyer journey.



Damien Roberts is on your site

#### Salesforce Data

Title  
CMO

Company  
Netflix

Sara Salesrep

Welcome, Damien 🙌  
I'm Sara, Netflix's dedicated rep. Do you have any questions about pricing?





# 4

Strategy No. 4

## Use Salesforce Data to Intelligently Route Conversations

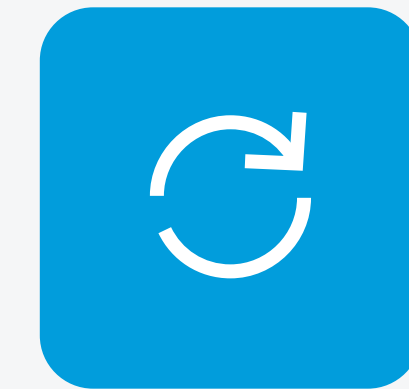
In a hurry?  
Get the TL;DR.



Surface Lead  
and Contact data  
the moment a  
prospect lands  
on your website



Use that data to  
have a personalized  
conversation



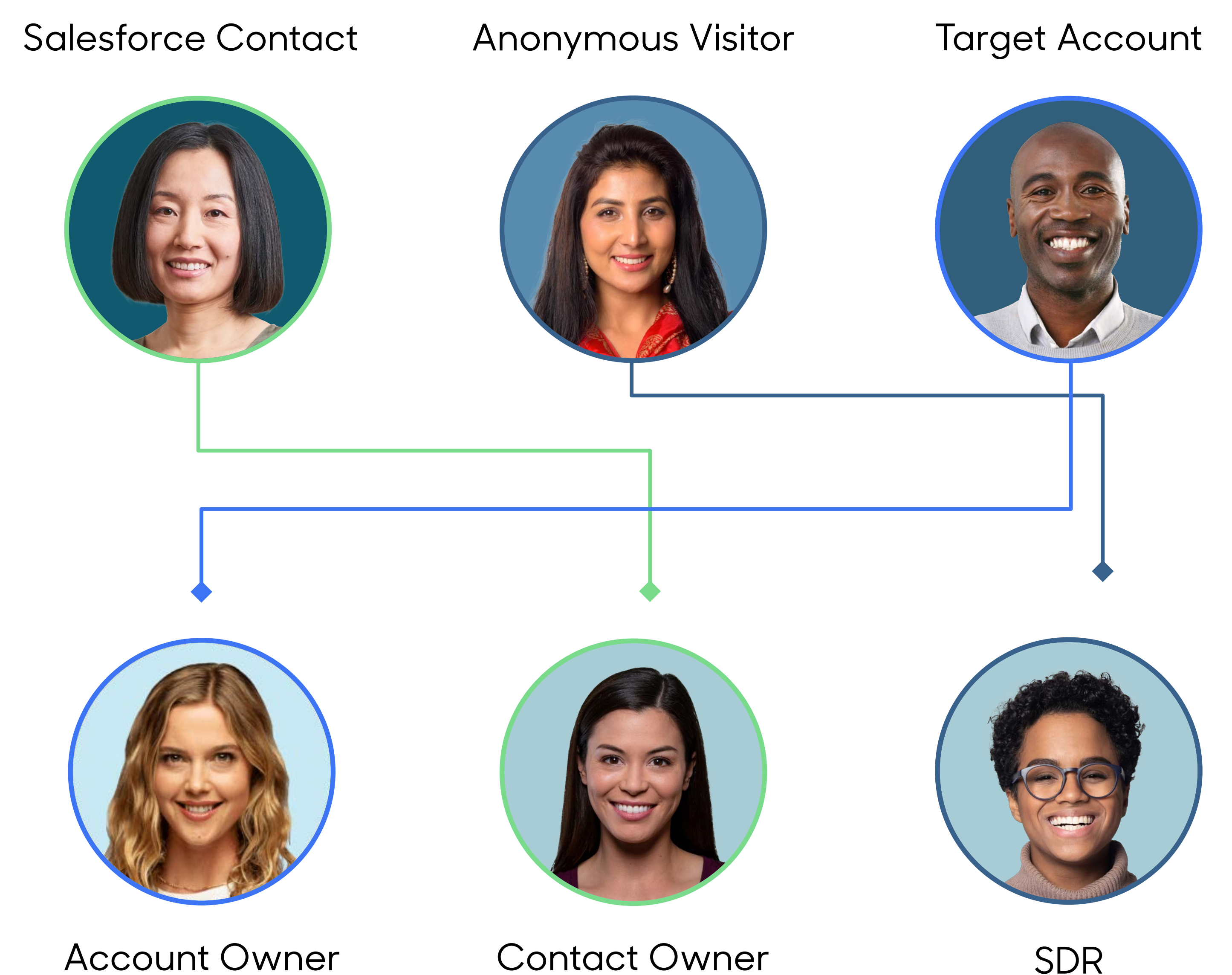
Get your  
hard-earned  
marketing audience  
into a sales cycle

### The Strategy

Because you know everything about your website visitors, you can use your Salesforce data and custom routing rules to determine the perfect moment to route a visitor to the appropriate account rep.

For example, if you specialize in certain industries, route to industry specialists who understand unique pain points.

You can get really specific with your conversational sales and marketing routing rules; for instance, you can identify which reps you fallback to when other reps are unavailable.





# 5

Strategy No. 5

## Roll Out the Red Carpet for ABM Target Account Visitors

In a hurry?  
Get the TL;DR.



Know the moment  
a target account  
visitor is on site



Immediately notify  
and route to  
the Salesforce  
account owner



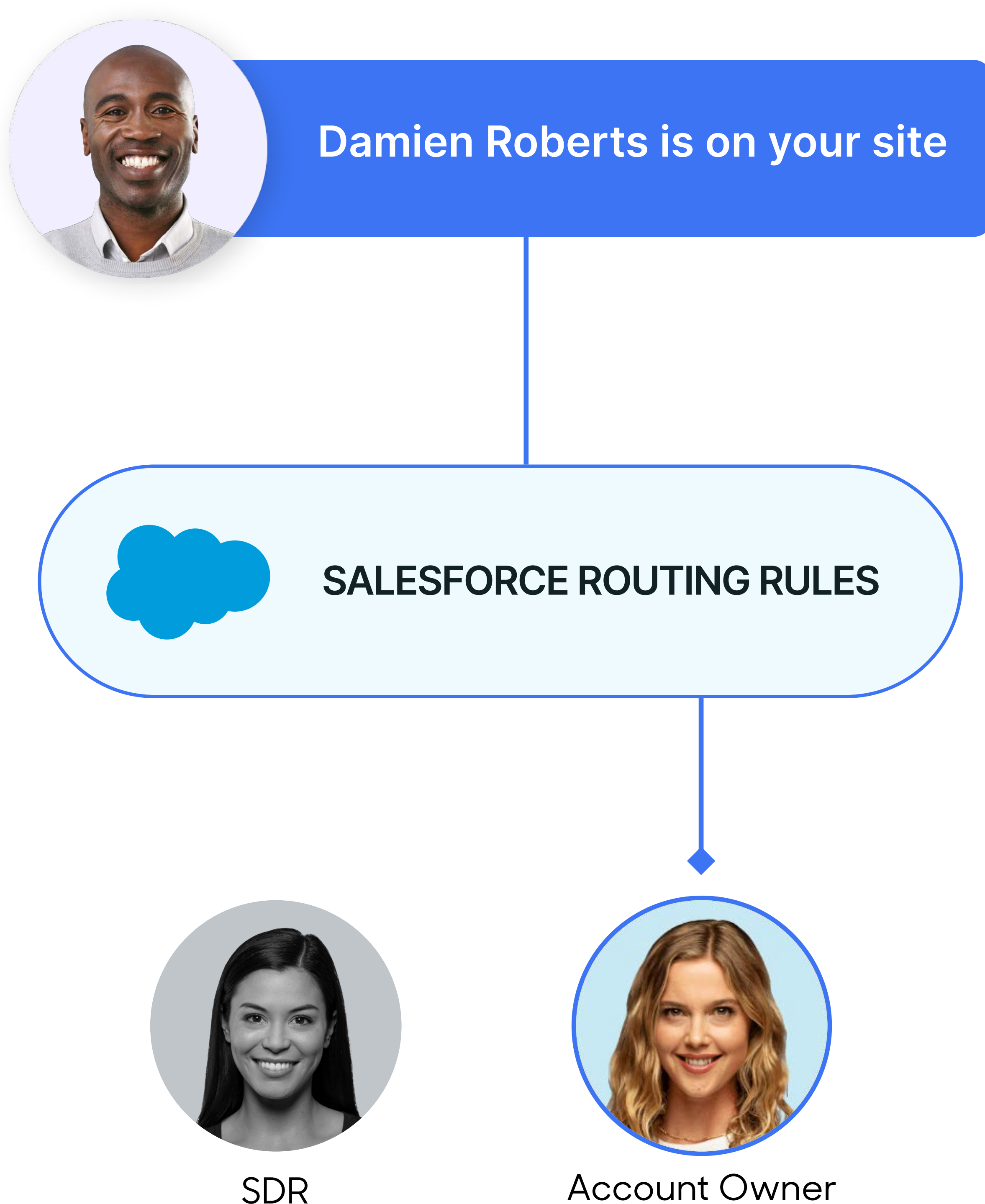
Give the visitor a VIP  
experience to drive  
more conversions

### The Strategy

The goal of ABM is to engage key, target accounts. When you finally get a target account on your website—do you really want to ask them to fill out a form and tell them “We’ll get back to you later”? Of course not!

With the ABM Red Carpet experience, your reps can get alerts the moment a prospect from a target account lands on your website. The conversation will be routed using your unique Salesforce routing rules, and your reps can roll out the VIP red carpet.

Proving ROI from ABM can be hard. This strategy will help you get the conversions you need from the accounts that matter most.





# 6

Strategy No. 6

## Accelerate Deals with Open Opportunities

In a hurry?  
Get the TL;DR.



Conversational is about more than leads; it's about closing deals



Get alerted the second an open Opportunity is on your website



All hands on deck - skip the bot and get them right to a human

### The Strategy

Conversational sales and marketing not only drives new pipeline, it can be instrumental in helping accelerate deal cycles. Using a conversational sales and marketing platform that is custom built for Salesforce, you'll know exactly when an open Opportunity is on your website.

From Stage 1 all the way through to Closed-Won, make sure your open Opportunities get the best experience possible every time they interact with your brand.



Damien Roberts is on the pricing page

Sara Salesrep

Welcome back, Damien 🙌  
Do you have any questions about that proposal I sent over?



Damien Roberts

Yes, can we jump on a quick call?

Sara Salesrep

Let's hop on a call!







# Conversational Sales and Marketing Feature Checklist

Everything you need to make sure your platform gets the most out of your Salesforce data

## The Salesforce Integration

- ☐ Instantly know when Leads or Contacts are on your site
- ☐ Trigger website experiences based on Salesforce data, including Leads, Contacts, Accounts, and Opportunities
- ☐ Run full-cycle Account-Based Marketing programs with Salesforce
- ☐ Route conversations based on Salesforce ownership or routing rules
- ☐ Track attribution and influence with Connected Campaigns
- ☐ Instantly report on performance with Salesforce Reports and Dashboards
- ☐ Support the complete Salesforce data model including Accounts, Contacts, Opportunities, Leads, Campaigns, Activities, and Users

## Other Important Considerations

- ☐ Is your customer success manager Salesforce Admin certified?
- ☐ Is the platform ranked #1 on the Salesforce AppExchange for their category?
- ☐ Has Salesforce invested in the company's success?