

# 3 SECRETS TO SETTING APPOINTMENTS USING A BOT



## Overview

Most businesses offer demos to market their product. It's an effective way to help a potential buyer understand the value impact of a product for their business. However, is the traditional process of using a form for booking those demos the best process out there? Definitely not.

Booking demos can be a tedious and frustrating process. What do you do with a lead that keeps rescheduling? How do you handle tire-kickers? If your marketing is too targeted, will you miss out on potential red-hot clients? Will people get frustrated if they don't hear back from you fast enough? These are all concerns businesses have when deciding how to best lead people to book demos.

The chatbot craze has dominated stories in the last decade- but hadn't given us much real reason to celebrate. Now? We're celebrating. Many of these issues can be solved through **conversational AI**! Chatbots are now being used to book demos, carry out best practice techniques, and even run testing to optimize a business's appointment setting process.



### BEST PRACTICES

1. Managing Expectations
2. Qualifying Leads
2. Capturing Information



### TEST & OPTIMIZE

1. Engagement Rate
2. Email Capture Rate
3. Meetings Booked
4. Order & Sequence



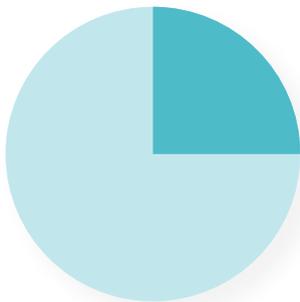
## Result

Having a bot means automatic 24/7 service. And with an automatic chatbot- that organization can respond to those people cheaper and faster than before. With a bot qualifying potential leads, the need for a Sales Development Representative diminishes, saving you anywhere from 25 to 60k. AND for one of our clients, adding a bot to their websites increased appointment settings by **567%**. They went from around 30 appointments a month to 200 appointments a month, all through the power of bots!

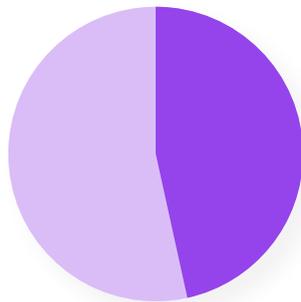
The numbers vary from business to business, but we've found that on average almost 1/4 of people that engage with the bot, end up booking a demo. Here are our stats for a standard demo bot:

- An average of 46.56% of users convert from conversation to giving their email.
- 46.58% of those users convert from giving an email to booking a meeting.

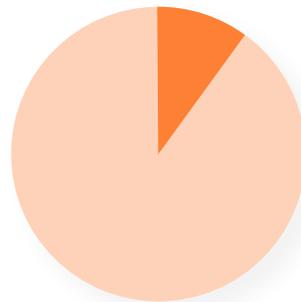
This totals the overall conversion between a conversation to meeting booked at 21.48%



**25%** OF USERS  
ENGAGING WITH  
THE BOT END UP BOOKING A DEMO WITH YOU



**46%** CONVERT  
FROM CONVO  
TO PROVIDING THEIR EMAIL TO YOU



OVERALL  
CONVERSION IS **21%**  
FROM CONVERSATION TO MEETING BOOKED

The reality is, it's easier to respond to a chatbot than to fill out a form. Even if not everyone books meetings, you're going to contact 25-50% more people through the bot. Increased reach means **increased sales**, but it also means extra customers to work with. And that influx in people means it's even more crucial to use your bots correctly. Curious? Let's dive in!



# 1 Getting Started

Once you've decided to use a bot to book meetings, the first step is to decide where you want to put it and how you want to activate it. Make sure you have a way of sending traffic to your website and a clear offer.

1. If you already have a DEMO button that directs buyers to a *forms page*, one common tactic is to have your bot activate on *that forms page*. This puts the bot in a place where they've already indicated that they're interested in the demo. Try: "Hey, do you want to skip the form? I can schedule this meeting for you right now." to help the buyer understand how the bot is helpful to them.
2. Another option, if you're very confident in your chatbot, is to get rid of your forms page completely and let the DEMO button activate the bot exclusively. You might need a little bit more of an intro, but it's **fast and easy**.



There is one thing to be careful about, however. We recommend against having a demo chatbot pop up automatically when anyone enters your site. You're going to get a lot of uninterested people this way, and it seems far too impersonal. Be **strategic** about where you're putting the demo offers, utilizing buttons to indicate potential interest.



## 2

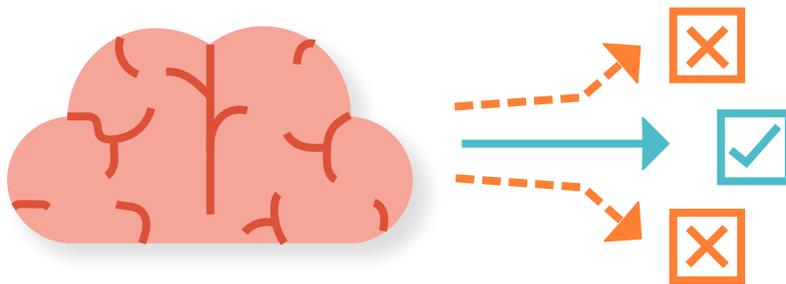
## Best Practices

Two of the best practices for using chatbots to book demos include managing expectations and qualifying your leads.

### Managing Expectation

Nobody likes to be lied to. This is true not only in real life but over the internet too! Managing expectations is a skill that many businesses have yet to perfect, but it's crucial for the **loyalty** of the customer. Let customers know how many questions you're going to ask before the resolution. If your demo is a recorded video, give them the heads up. If it's live, tell them that too. Is your plan to do a bait and switch... just don't.

When we know what to expect, we are more open to new information and more trusting in our decision making!



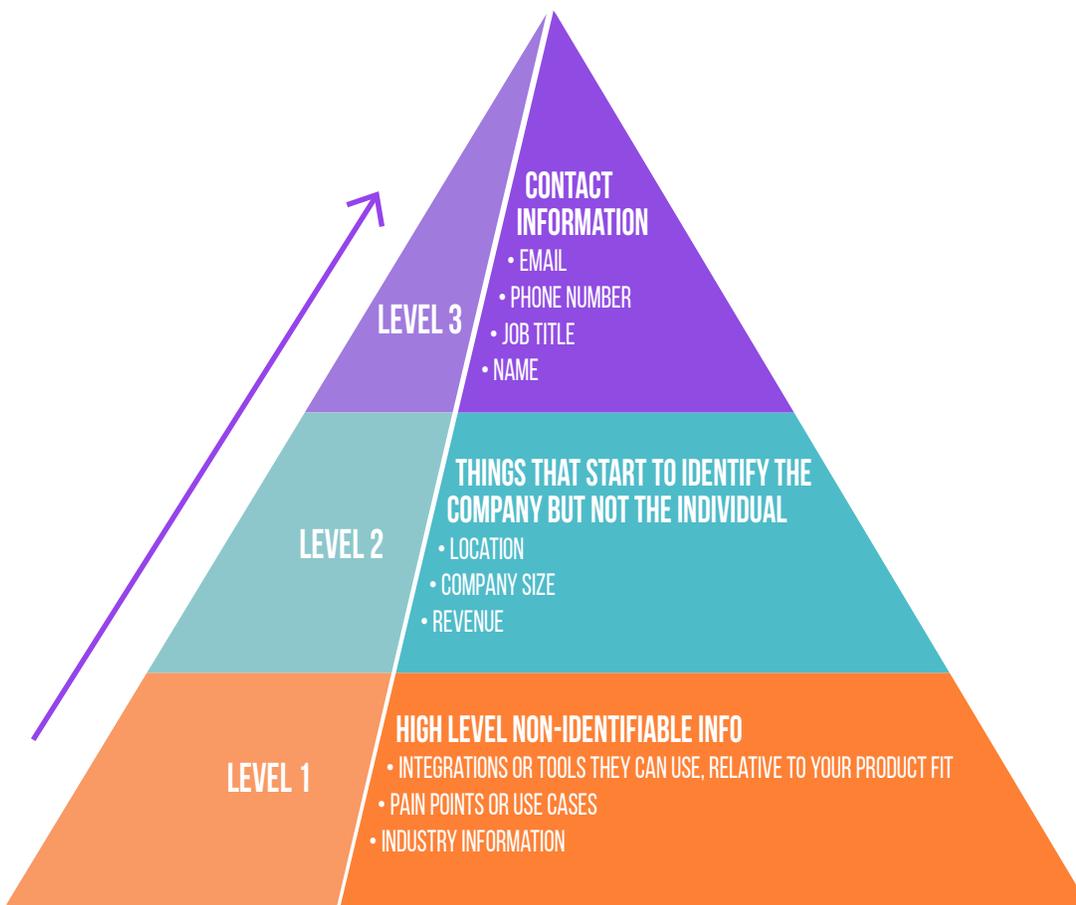
### Qualifying Leads and Capturing Information

Qualifying your leads is something that should always be done with potential customers, but ESPECIALLY when using a bot. Chatbots can't replace human interaction, but they are great at filtering out the people that are really interested. When done well, bots can have a conversion rate of **40-60%** better than forms. When done poorly? It can be worse.



Here are the most important factors to a bot to qualify leads well:

1. **Stay under 5 questions.** More than that and people get bored and want to leave. Ask more than 5 questions and you'll see a significant drop in engagement.
2. **DO NOT START** with questions like, "Can I get your email?" You wouldn't start a conversation with a real person that way- it's off-putting and you haven't proven they can trust you yet.
3. Use the **pyramid of engagement** to know which questions to ask whe



When you think about it like you're talking to a real person, it becomes a lot easier to understand how the conversation should go. Ask a few questions to see what their situation and need is like, and if they are really interested. Then let the bot automatically schedule an appointment with the rep that's right for them.



## 3 Test & Optimize

The first draft is almost never the final version. Any great product needs hours and hours of **strategic testing** and adjusting, and bots are no exception. Here are some metrics to look at when considering how to adjust your chatbots.

1. **Engagement Rate** – Consider how many people answered your first question after being presented with the bot.

- For an active engagement bot (triggered from behaviors other than a button) you should be above 2% on average.
- On high intent pages, you should be above 5%.
- But for a button click activated bot, you should always be above 10% or you have some serious work to do. This type of bot is designed to interact with buyers already interested in the process, and you shouldn't lose over 90% of the people in the process.

# ENGAGEMENT % SHOULD BE ABOVE:

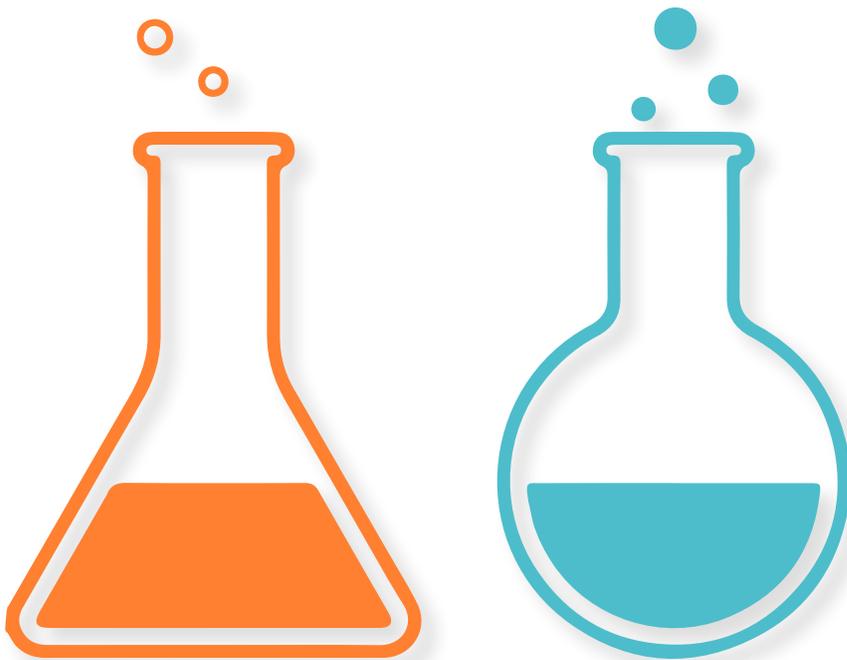


2. **Email Capture Rate** - Notice the percentage of users you capture an email from. If a person is willing to give their information then you're probably doing something right, and if they aren't then it could signal an issue with your tactics.



3. **Calendar Drops and Meetings Booked** - Just like the email capture rate, the percentage of users that reached a calendar drop and scheduled a meeting can give you **insight** to your conversion. This is the final stage, and really the purpose of using a bot to book demos. Make sure your funnel to this point is reasonable and you're not losing too many people along the way.

4. **Order and Sequence** - If your bot isn't converting, you could have an issue with the wording and flow of the conversation. A bot should be direct, conversational, helpful, and engaging. Don't overwhelm yourself by trying to incorporate everything at once. Create drafts and **consistently** edit your bot. Experimenting with A/B testing is crucial! Change your greeting, qualifying process, and the way you request information. Altering your bot's copy can make a huge difference in your conversions.





## Summary

Understanding how to effectively book a meeting with a bot is vital in the marketing world. Demos allow buyers to see how a product or service could help their business. Using bots to schedule appointments is one way to boost sales and increase leads, while simultaneously cutting costs. In this day and age, quickly getting a hold of customers and **responding fast** is something that is expected. Don't let your business fall behind the times. Set up your bots, follow best practices, and test to optimize!



## About Us

ChatFunnels is a Conversation AI Platform and Consulting Solutions provider. We help companies maximize the effectiveness of their conversational marketing efforts in order to achieve better engagement results. We specialize in the use of chatbots for B2B (Business to Business) sales and marketing, emphasizing work with Drift & Intercom software. We advise, manage, and train companies on how to best use these to collect and qualify leads, book meetings for sales reps, and other creative uses of chatbots in sales and marketing.



Chatfunnels, LLC  
33 W 400 S  
Provo, UT 84601

contact@chatfunnels.com  
[www.chatfunnels.com](http://www.chatfunnels.com)

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