

 OnceHub

The essential guide to  
getting started with chatbots

# Introduction

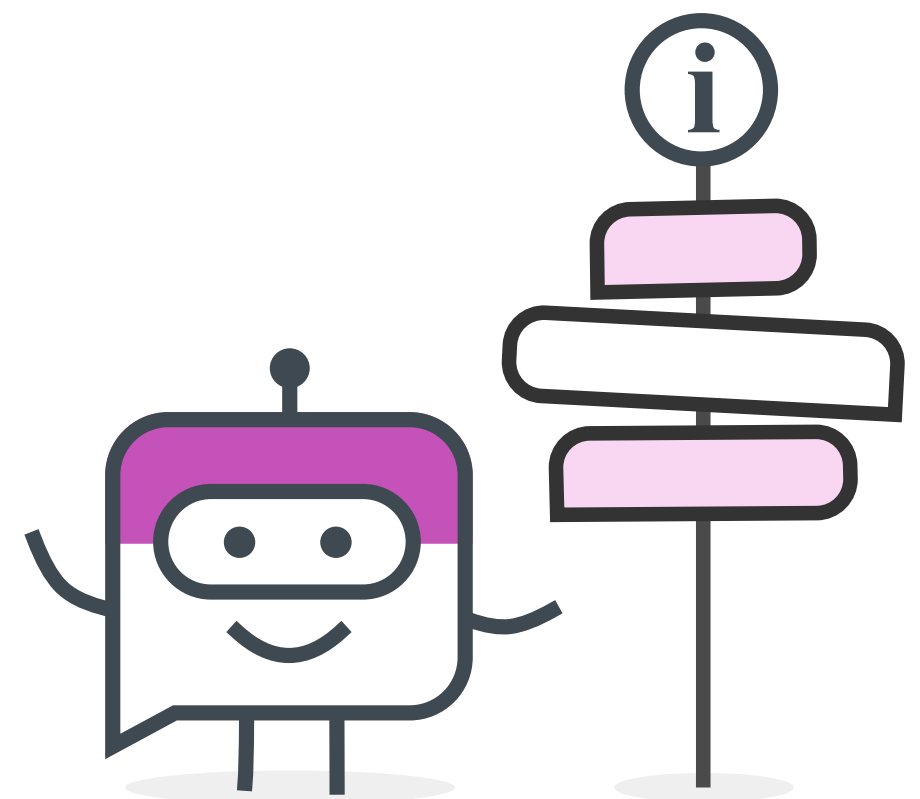
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Let's be honest. Most of us have had a bad experience with website chatbots. Many of them are just badly designed with vague goals and generic content. Even worse are the AI chatbots that pretend to understand what we're looking for but usually can't give sensible answers.

However, chatbots don't have to be like this at all. A well-designed chatbot can delight your customers, increase your sales, and save you time. All it takes is a bit of thought, planning, and fine-tuning.

Let's get started with the most common questions that people ask about chatbots.

- **Why should I use a chatbot?**
- **Which chatbots should I use?**
- **How do I get started?**



# Why should I use a chatbot?

## 1. Your customers want to use chatbots

Messaging apps have soared in popularity during recent years. Your customers use them to connect with friends, engage with brands, and even to make online purchases.

Chatbots are like a messaging app for your website. They're an easy and engaging way for customers to learn more about your products or services.

## 2. Your competitors are going to use chatbots

It's never been easier to add chatbots to your website. The latest tools don't require coding skills or technical know-how. In fact, it takes just a few minutes to build, customize, and publish your first chatbot.

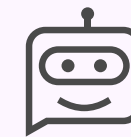
Unfortunately, it's also now quick and easy for your competitors to add chatbots to their websites. In fact, it's only a matter of time before they do.

## 3. Your team will love it when chatbots do their work

Chatbots are ideal for repetitive tasks. For example, they can capture contact information, qualify prospects, or schedule meetings. They can do this 24/7 and will never complain or ask for a pay raise.

Meanwhile, you and your team have more important things to focus on. Chatbots can't replace humans (at least, not yet) but they can lighten the load for your team.

### Did you know?



**69%** of users prefer chatbots because they provide quick answers to simple questions. <sup>1</sup>



**56%** of users prefer to use chatbots than call customer services. <sup>2</sup>



**47%** of users are open to purchasing items through a chatbot. <sup>3</sup>



**43%** of businesses report that their competitors are already using chatbots. <sup>4</sup>



**36%** of businesses use chatbots to generate more leads. <sup>5</sup>

<sup>1</sup> Salesforce, <sup>2</sup> Outgrow, <sup>3</sup> HubSpot, <sup>4</sup> Accenture, <sup>5</sup> Tidio

# Benefits of using a chatbot

## 1. Increase your sales

A chatbot on your website can accelerate your lead conversion, leading to an increase in overall sales.

For example, it only takes a few minutes for a chatbot to identify a high-value website visitor, qualify them with a few questions, and then invite them to a live chat conversation or instant video/phone call with your team.

## 2. Delight your customers

Customers just want to satisfy their needs and then move on with their lives. They don't want to take part in a slow sales process or wait days (or even hours) before getting a response from your team.

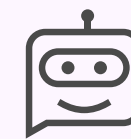
A well-designed chatbot is a great way to delight customers. It should be easy to use, saving them time while also providing all the information they need.

## 3. Save time and money

You and your team only have so many hours in the day, and you don't want to waste them on repetitive tasks.

Adding chatbots to your website is like adding another person to your team. They'll work 24/7, engaging with website visitors, qualifying leads, and scheduling meetings.

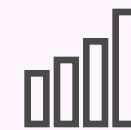
### Did you know?



**80%** of businesses will look to use chatbots. <sup>1</sup>



**56%** of businesses say chatbots are driving disruption in their industry. <sup>2</sup>



**58%** of chatbots are used for sales and marketing. <sup>3</sup>



**37%** of chatbots are used for support. <sup>3</sup>



**30%** of support costs can be saved by using chatbots. <sup>4</sup>

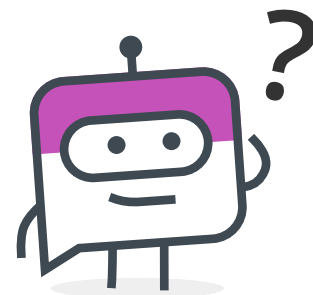
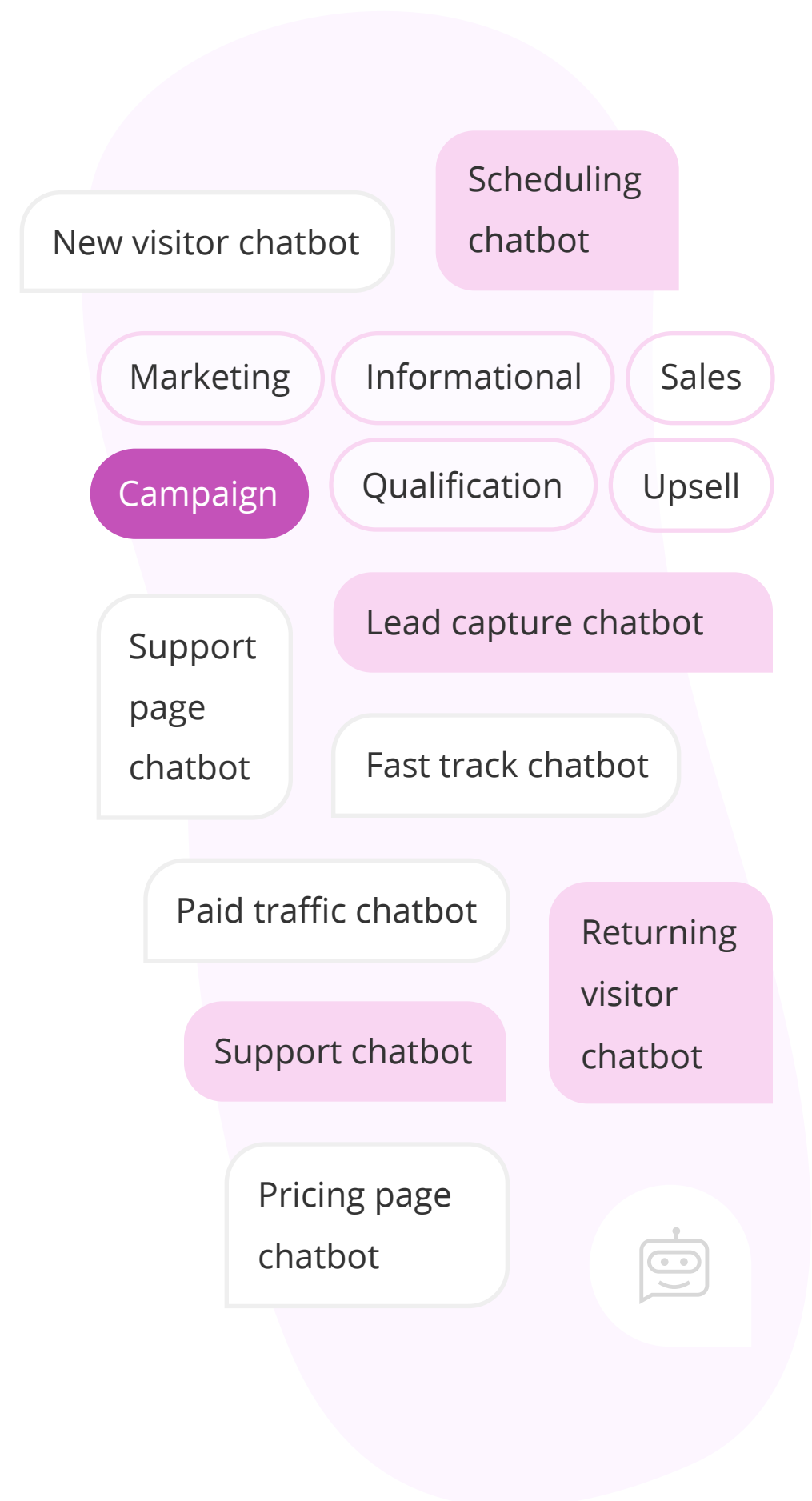
<sup>1</sup> Business Insider, <sup>2</sup> Accenture, <sup>3</sup> Intercom, <sup>4</sup> IBM

# Which chatbots should I use?

There's no one-size-fits-all approach when it comes to using chatbots on your website. You should think about creating a range of chatbots that target different audiences with different content. Personalization and focus are key to making your chatbots engaging and successful.

Here are the top chatbot strategies that you should consider for your business.

1. Informational chatbots
2. Lead capture chatbots
3. Lead qualification chatbots
4. Lead engagement chatbots



# 1. Informational chatbots

## What are they?

- Chatbots that provide information or guidance to website visitors.

## When should you use them?

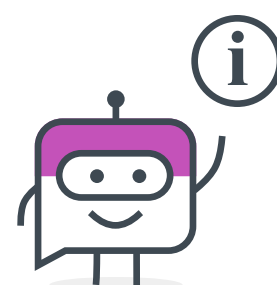
- Ideal for situations where visitors are looking for more information about your products or services.
- Also ideal for situations where you want to provide short-cuts or fast-track routes to important content.

## What's the benefit for your business?

- Capture valuable information about what your visitors are looking for.
- Engage visitors with an interactive chatbot instead of a static navigation menu.
- Save time by reducing the amount of emails or support calls to your team.

## How could you customize them?

- Create different chatbots for different sections of your website. For example: visitors on a Support page could see a different chatbot to visitors on a Legal page.
- Create chatbots that include videos or photos. For example: you could include a short video of your products, services, or team.



**Admissions Bot**

Welcome to our undergraduate admissions chatbot!

What information are you looking for?

**Student life**

And what area of student life are you interested in?

**Housing**

Are you interested in on-campus or off-campus housing?

**On-campus**

Great!

Here's a short video by some of our students to show you what's available.

**CAMPUS LIFE**

## 2. Lead capture chatbots

### What are they?

- Chatbots that capture information from website visitors who are interested in your products or services.

### When should you use them?

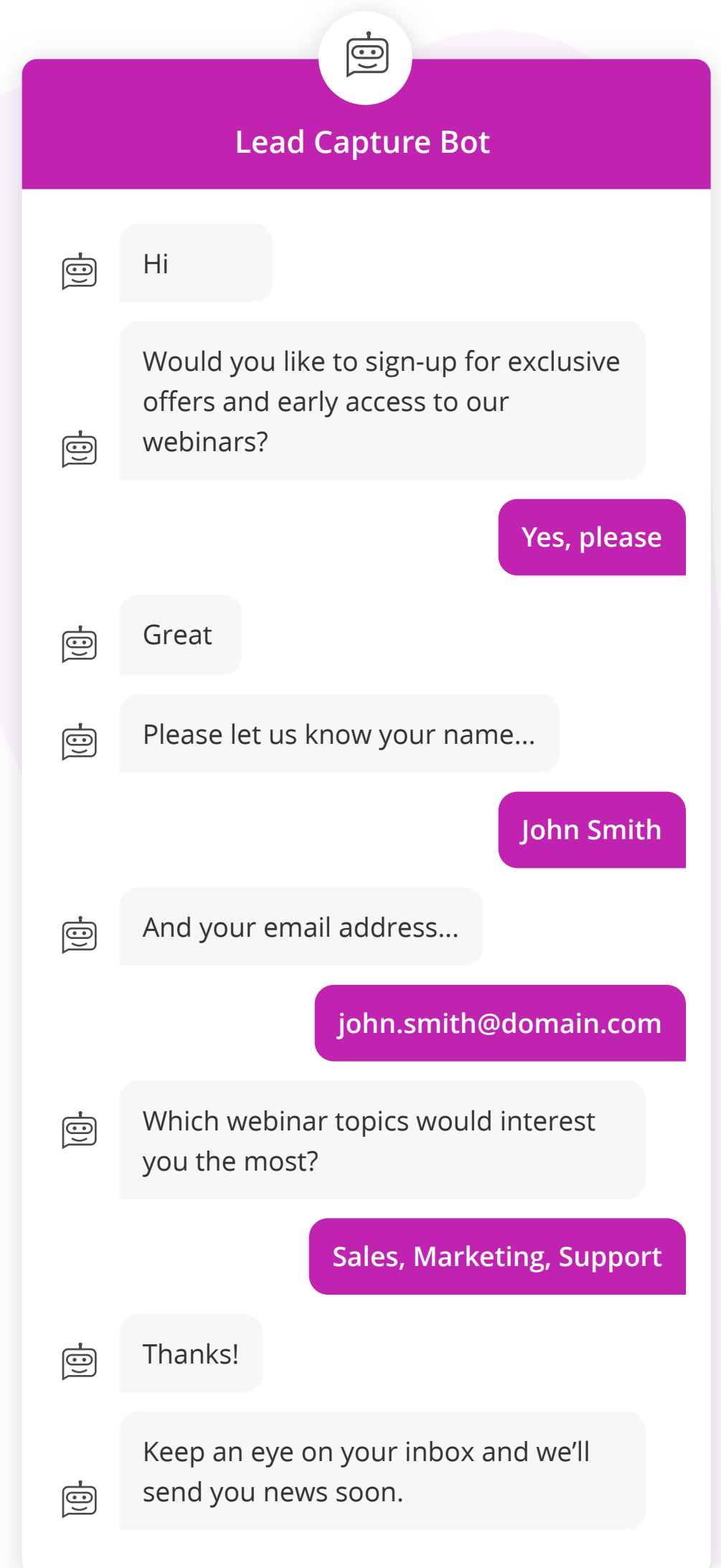
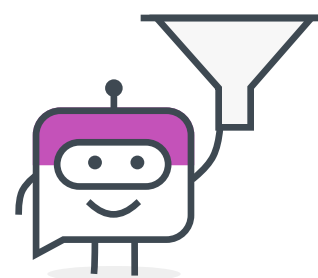
- Ideal for situations where visitors are not quite ready to schedule a meeting but you still want to capture their details.
- Also ideal for situations where you want to review visitor information before reaching out to them.

### What's the benefit for your business?

- Capture lead information for your marketing activities or sales funnel.
- Engage visitors with an interactive chatbot instead of a static form.
- Save time by ensuring that your team gets all the information they need.

### How could you customize them?

- Create chatbots that offer exclusive content in exchange for information. For example: visitors could watch a video or download an ebook after entering their email address.
- Create chatbots that are playful and memorable. For example: you could create a fun quiz to help visitors learn more about your products or services.



# 3. Lead qualification chatbots

## What are they?

- Chatbots that qualify website visitors with a few key questions before inviting them to join a live chat or an instant video/phone call with your team.

## When should you use them?

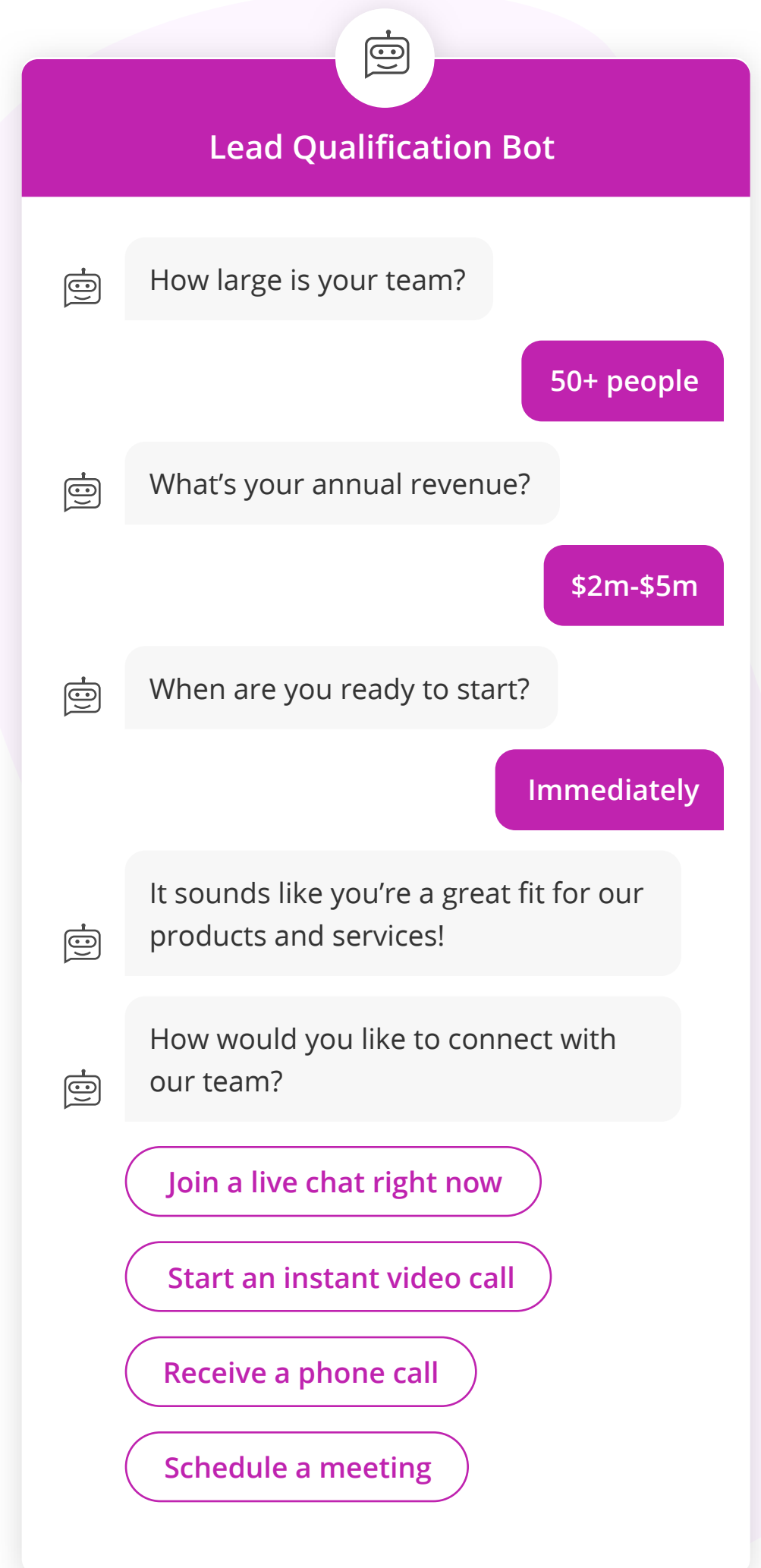
- Ideal for website pages where you need to qualify leads before inviting them to engage with your team.
- Visitors who don't meet the qualification criteria can be invited to watch a video, directed to another page on your website, or contacted by email.

## What's the benefit for your business?

- Increase sales by quickly converting visitors into qualified leads.
- Delight qualified leads by inviting them to join a live chat conversation or an instant video/phone call.
- Save time by ensuring that your team only meets with the right people.

## How could you customize them?

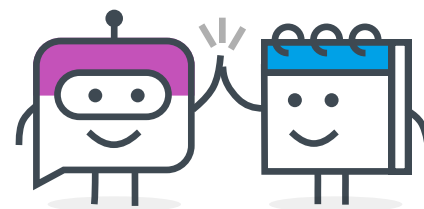
- Create different qualification questions for different sections of your website. For example: you may have multiple products or services with unique qualification criteria.
- Create different chatbots for first-time visitors versus returning visitors. For example: first-time visitors might be interested in learning more about your business.



The image shows a chatbot interface titled "Lead Qualification Bot". It features a series of questions and answers:

- Question: "How large is your team?" Answer: "50+ people"
- Question: "What's your annual revenue?" Answer: "\$2m-\$5m"
- Question: "When are you ready to start?" Answer: "Immediately"
- Message: "It sounds like you're a great fit for our products and services!"
- Question: "How would you like to connect with our team?"

At the bottom, there are four buttons: "Join a live chat right now", "Start an instant video call", "Receive a phone call", and "Schedule a meeting".





# 4. Lead engagement chatbots

## What are they?

- Chatbots that invite leads to choose how they engage with your team: a live chat conversation, an instant video/phone call, or a scheduled meeting.

## When should you use them?

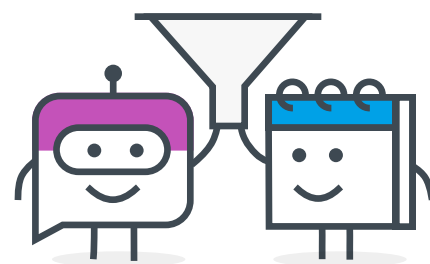
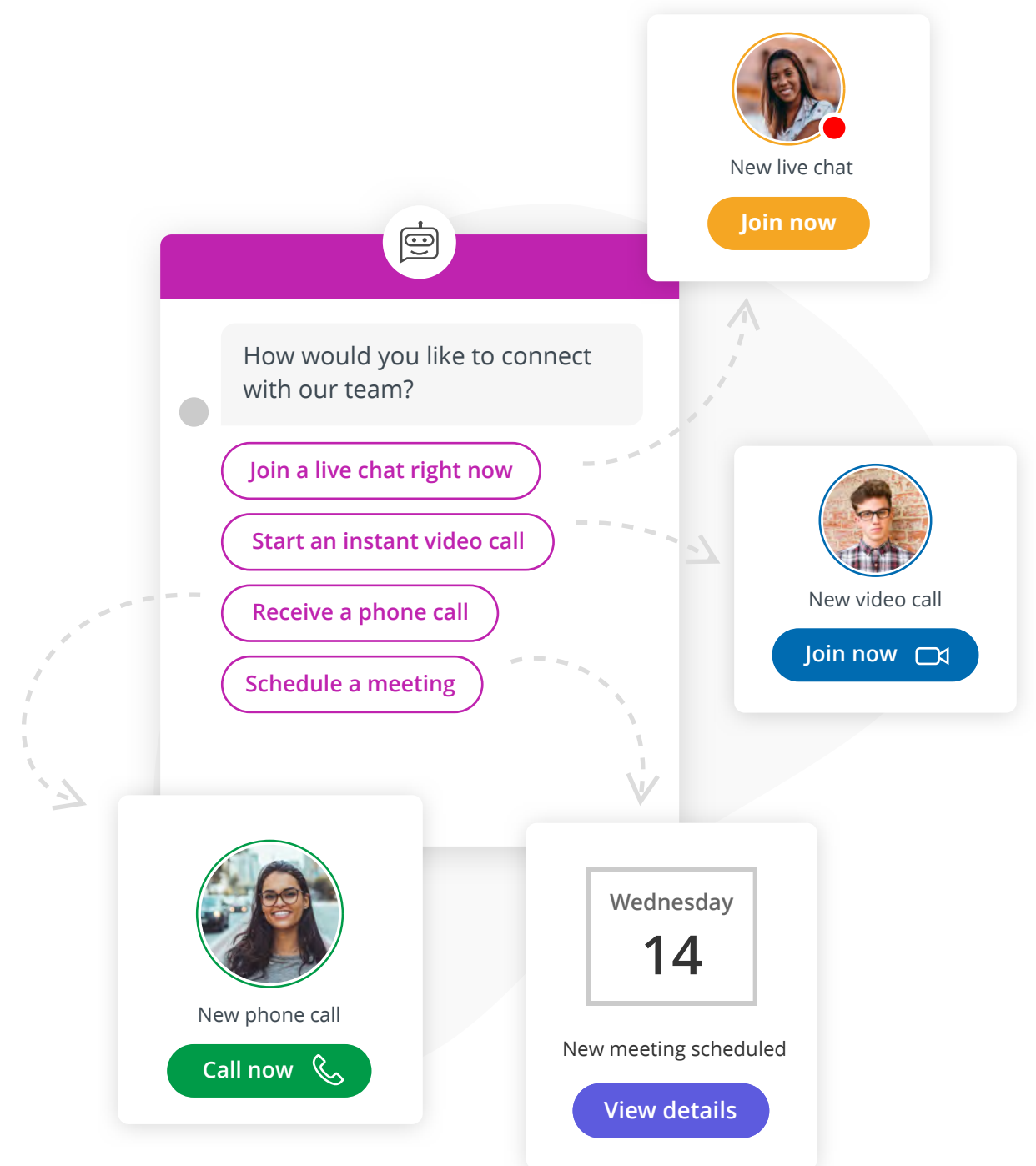
- Ideal for website pages where you need to qualify leads before inviting them to engage with your team.
- Also ideal for paid campaigns and landing pages where you don't need to qualify visitors before connecting them with your team.

## What's the benefit for your business?

- Increase sales by instantly engaging with qualified leads.
- Delight qualified leads by letting them choose how and when they connect with your team.
- Save time by ensuring that your team only meets with the right people.

## How could you customize them?

- Create chatbots that offer different lead engagement options depending on how the website visitor answered the qualification questions.



# How do I get started?

## 1. Research existing chatbots

A good starting point is to look at chatbots created by other businesses. These could be direct competitors or a company in a completely different industry.

Your chatbot strategy should be as unique as your business, so it's unlikely that you'll want to just duplicate someone else's chatbots. However, it's a good way of seeing which chatbot ideas work well (and which don't work well). Why not start by taking a look at some of our [chatbot demos](#)?

## 2. Define your chatbot goals

Designing an effective chatbot is like designing a web page or an email: you need to define a clear goal. Are you looking to capture leads, schedule meetings, qualify prospects, or something else?

To define your chatbot goals, start by thinking about the most important pages on your website and how they help you achieve your business goals. Next, think about how a chatbot could make a difference to those pages by complementing and enhancing the existing content.

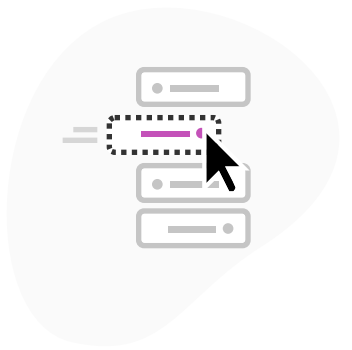
## 3. Build your first chatbots

At the beginning, it's best to start simple with just a few chatbots on your website. Once you see how these are working, you can then build more complicated chatbots with advanced audiences and targeting rules.

To help you get started, we've created a wide range of [chatbot templates](#) for different industries. Think of these as inspirational starting points that you can customize with your own content.

## 4. Monitor and optimize your chatbots

Once you've published your first chatbots, monitor them for a few weeks to see how they perform against your goals. It may take some time to fully optimize your chatbots but the reward will be well worth the effort.



# You did it!

Thanks for making it to the end!

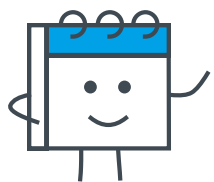
We really hope that you enjoyed this guide and found it useful. If you have comments or questions, we'd love to hear from you at [success@oncehub.com](mailto:success@oncehub.com).

Also, don't forget to check out our lead acceleration solutions: [ScheduleOnce](#), [ChatOnce](#), [FormOnce](#), and [SubmitOnce](#). We might be slightly biased but we think you'll fall in love with them!

Plus, we have some great [case studies](#) if you're looking to learn from people who've used our solutions to capture, qualify, and engage with more website leads more quickly.

Happy chatting!

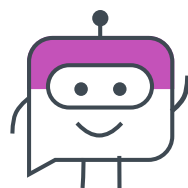
**ScheduleOnce**



**Smart scheduling**

that connects prospects and customers with the right people in your team

**ChatOnce**



**Smart chatbots**

that qualify leads and connect them instantly with the right people in your team

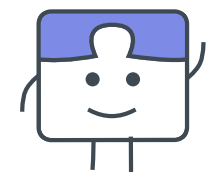
**FormOnce**



**Smart forms**

that qualify leads and connect them instantly with the right people in your team

**SubmitOnce**



Smart lead

qualification and instant engagement for your **existing webforms**



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