



Hi there...

How can I help?

*The Definitive Guide*  
**CONVERSATIONAL  
MARKETING**  
*for* **SALESFORCE**



**QUALIFIED**

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*The Definitive Guide*

# CONVERSATIONAL MARKETING *for* SALESFORCE



## What you'll learn in this guide

Having a conversation with your sales prospects is essential. So, why are B2B businesses constantly asking their leads to fill out forms? With the latest technology, having instant conversations is easier than ever.

This guide will help you understand Conversational Marketing, the value it brings to your business, and how it can fit into your larger, Salesforce-powered sales and marketing strategy. After reading this guide, you'll understand how Conversational Marketing can help you generate more leads, pipeline, and revenue and really move the needle in your business.

### You'll learn

- What is Conversational Marketing?
- How it's changing the way B2B companies sell.
- Why Conversational Marketing and Salesforce work well together.
- How to use Conversational Marketing to supercharge sales.

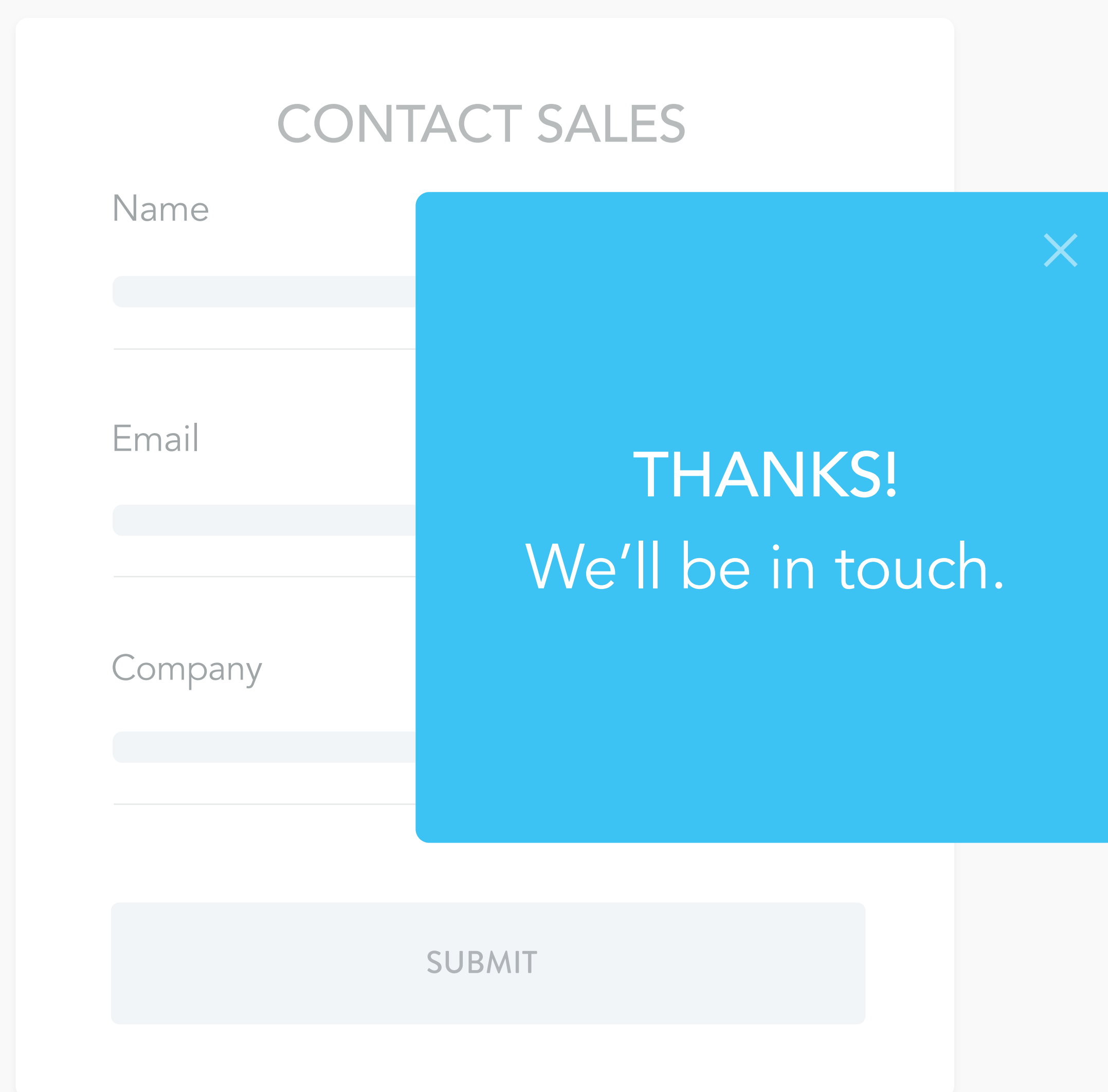
# Why Conversational Marketing?

## B2B buyer expectations are on the rise

Today's buyers have high expectations for real-time, personalized experiences, thanks to companies like Netflix, Lyft, and Amazon. So, why are B2B businesses still asking prospects to fill out forms to get in touch?

When you're interested in a company's services, you don't want to wait long to connect with their team. Unfortunately, the average time it takes a sales team to respond to a B2B inbound lead is 42 hours, according to a study from Harvard Business Review. This is not the way to connect with high-value prospects.

### OLD WAY



CONTACT SALES

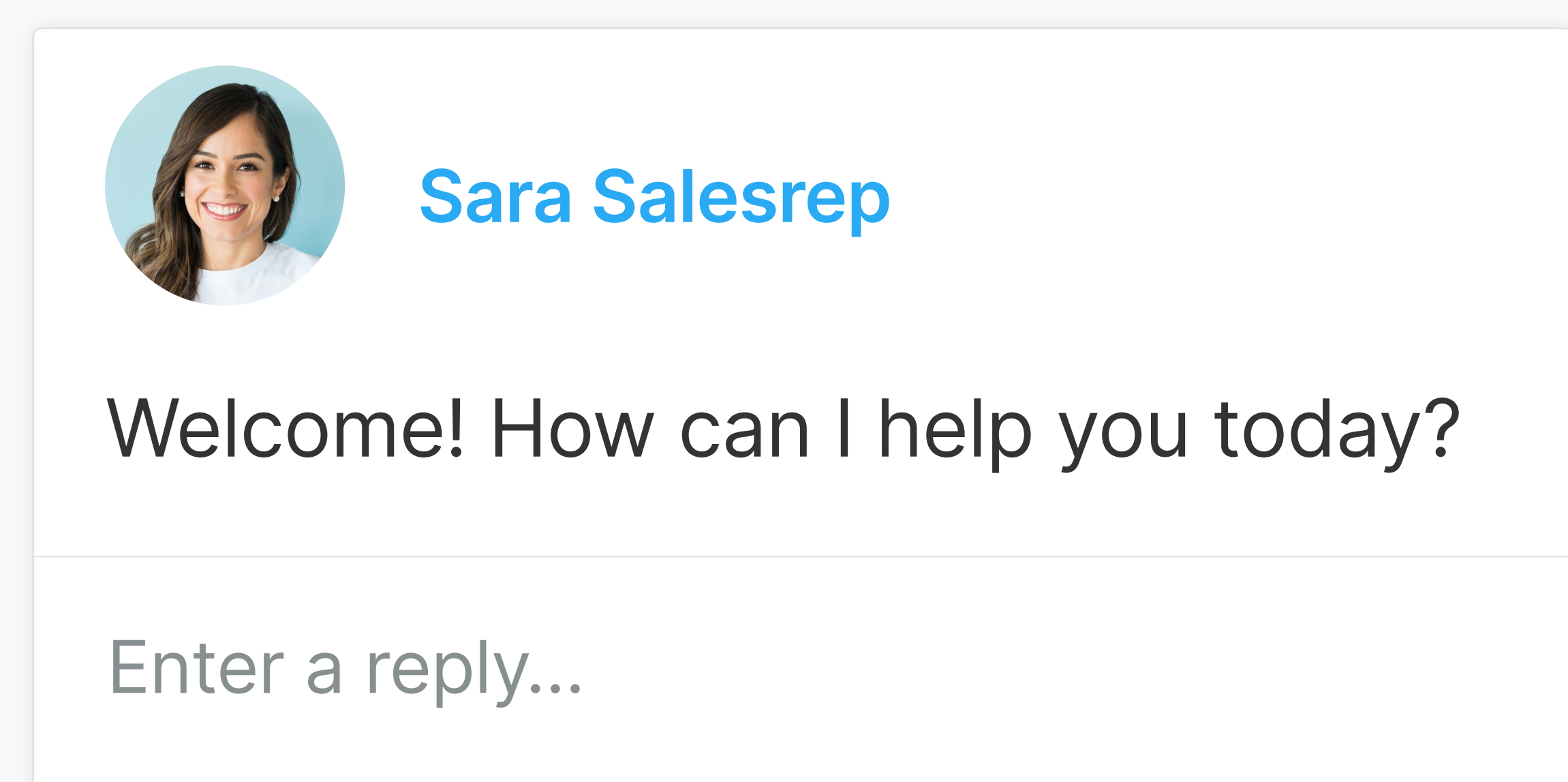
Name


Email

Company

**THANKS!**  
We'll be in touch.

### NEW WAY



 **Sara Salesrep**

Welcome! How can I help you today?

Enter a reply...



Customers want instantaneous results, which is why 56% of customers expect to find whatever they need from a company in 3 clicks or less, according to Salesforce's State of the Connected Customer Report. That's why businesses are using Conversational Marketing.

## Conversational Marketing is a new way of selling

The concept of Conversational Marketing is simple. What if you could meet with your high-intent website visitors the moment they arrived on your site, and engage them in a sales cycle?

Conversational Marketing opens the door to real-time sales conversations with your qualified buyers.

### DID YOU KNOW...

When B2B sales teams respond to leads in under 5 minutes, they're  
**100x more likely to make contact with that prospect**

- [Lead Response Management](#)

Here's how it works. Conversational Marketing gives you a clear picture of your website visitors, and gives you the opportunity to engage people right when their interest is piqued with live chat or chatbots. The result? More more leads, more booked meetings, opportunities in your pipeline, and ultimately more revenue for your business.



 Ashley Keane on the site now  
VP of Data, Tesla  
10,000+ Employees  
akeane@tesla.com 



**Sara Salesrep**

Welcome back Ashley. How can I help you today?

Talk to a specialist now



**Ashley Keane**

Can you take me through your pricing plans?



**Sara Salesrep**

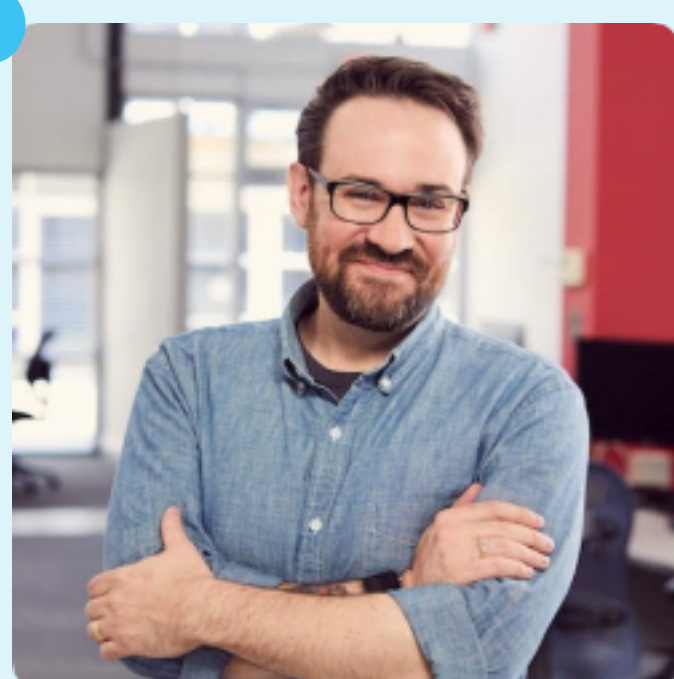
Absolutely. Let's move this to a call. I'll ring you now...



Incoming web call

**Sara Salesrep**

“



Conversational Marketing gives us the opportunity to say 'I'm so glad you're interested. How can I make this buying experience even easier?'

- Jason Etter, Marketing, Staffbase



# The Power of Conversational Marketing with Salesforce

## Salesforce is the foundation of your business

Conversational Marketing is a no-brainer for businesses that want to give their sales teams a boost, but it's most powerful if it's paired with the tools you already use. Because Salesforce plays a leading role in your overall sales and marketing strategy, it should also be the foundation of your Conversational Marketing strategy.

Conversational Marketing has the power to become a major channel for pipeline creation. It's critical that it's working in tandem with the platform where you're tracking and reporting the health of your entire business: Salesforce.

### *Pro tip...*

When looking for a Conversational Marketing solution, make sure it integrates with the tools you already use and love.



# Conversational Marketing + Salesforce = the perfect combination

Here's why Conversational Marketing and Salesforce play so nicely together.

## **Salesforce is the source of truth for all your customer data.**

Your customer data lives in a house, and that house is Salesforce. Leveraging this data in your Conversational Marketing strategy allows you to deliver personalized, impactful experiences.

## **Salesforce is your go-to for sales and marketing reporting.**

Salesforce is your go-to for up-to-the-minute insights on leads, pipeline, and revenue. Don't isolate your Conversational Marketing metrics, fold them into your larger reporting strategy.

## **Your sales and marketing teams love Salesforce.**

Salesforce is already doing major legwork for your team, which is why it's the first thing they log into in the morning. In order for Conversational Marketing to be effective, it needs to seamlessly tie into the systems they're using everyday.

“



Conversational Marketing allows someone who is using the Salesforce platform to have access to advanced B2C-like functionality.

- Jennifer Schneider, Salesforce Trailblazer



# How to use Conversational Marketing to Generate Leads, Pipeline and Revenue

## Conversational Marketing is about supercharging sales

Conversational Marketing is built for B2B companies and designed to grow sales. Whether you're using live sales reps, chatbots, or a combination of both, your end goal should always be to generate more leads, pipeline, and revenue for your business.

### *Pro tip...*

Before you kick off your Conversational Marketing program, set clear goals. Then track metrics 30 days and 60 days after go-live.



## Conversational Marketing grows your sales funnel

Conversational Marketing gets more leads in the door and through a sales cycle. Beyond lead creation, Conversational Marketing is a key channel for nurturing and converting Account-Based Marketing (ABM) target accounts as well as open Opportunities.

In this visual, you can see how Conversational Marketing fits into the context of your existing sales and marketing funnel.



“



With Conversational Marketing, marketers can confidently demonstrate the power of the website and how it's influencing pipeline.

- Andrea Tarrell, Salesforce Trailblazer



Here are some must-have Conversational Marketing strategies.

#### STRATEGY #1

## Use Conversational Marketing to generate more leads

Marketers and sales teams are hungry for new leads. But many companies are still relying on forms to capture potential prospects. Why make it tough on interested parties by asking them to fill out a form when you could instead have a quick conversation?

An easy way to get started with Conversational Marketing is by putting chatbots on your site to capture leads. As soon as you grab an email address and ask qualification questions, immediately create a lead in Salesforce. You can even book a sales meeting right inside of your chatbot conversation.

By using chatbots on your website, you can capture leads and book sales meetings around the clock.

#### Chatbot

May I quickly grab your email address?

[Send](#)

#### Chatbot

Thanks, Corinne! Please book a meeting with our team. 🙌 Looking forward to it!



#### Sam Salesrep

Today ▶

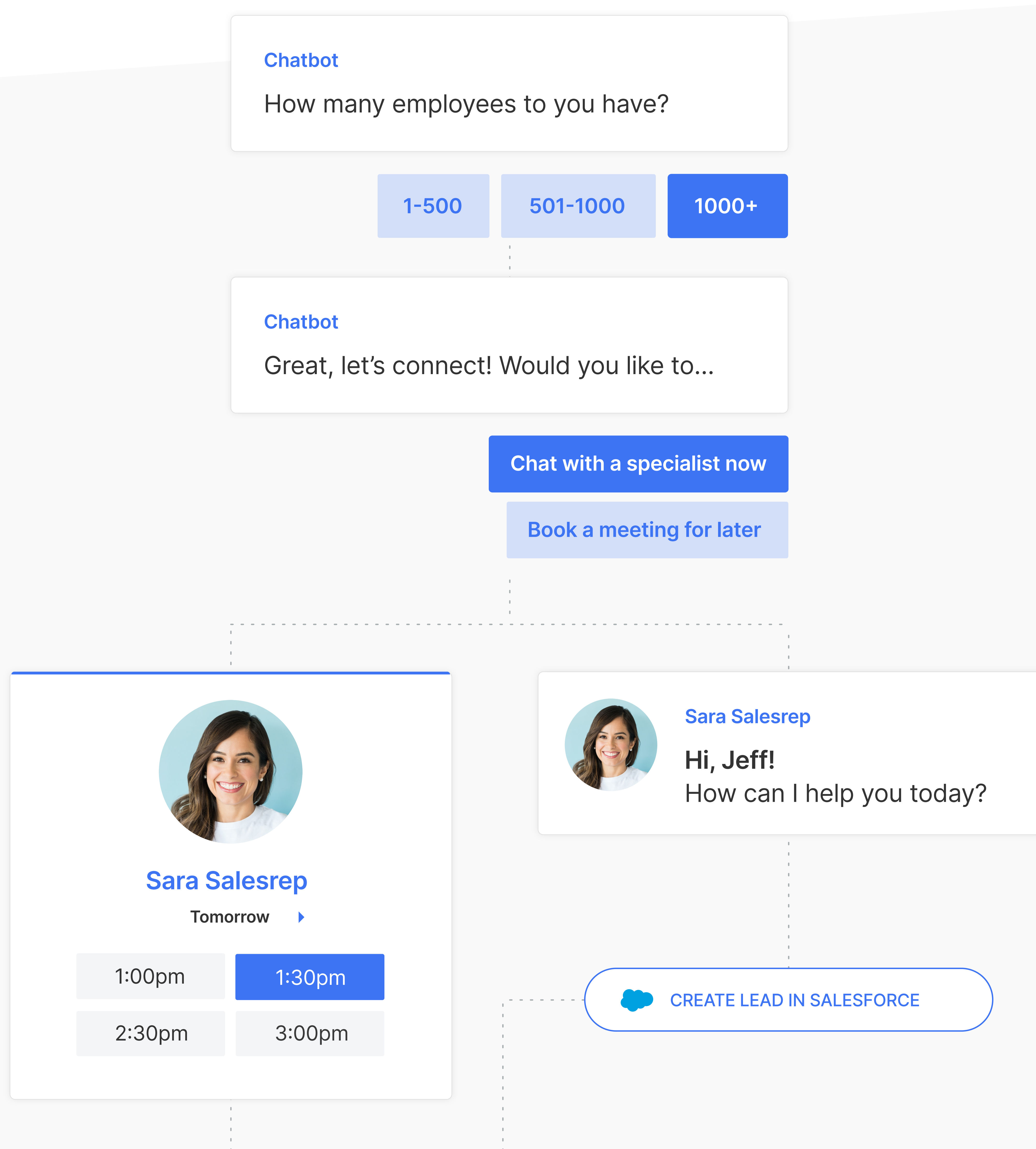
[1:00pm](#)[1:30pm](#)[2:30pm](#)[3:00pm](#)[CREATE LEAD IN SALESFORCE](#)

“

We supercharged website leads by **30%** by using  
Conversational Marketing with Salesforce.

- Elias Larkin, Zero Motorcycles

You can also route qualified buyers to live sales conversations. Sales reps can use a full-stack of meeting tools, including live chat, screen-sharing, and phone calls. This unlocks an entirely new channel to have high-fidelity sales conversations and discovery calls, and generate leads, right from your website.



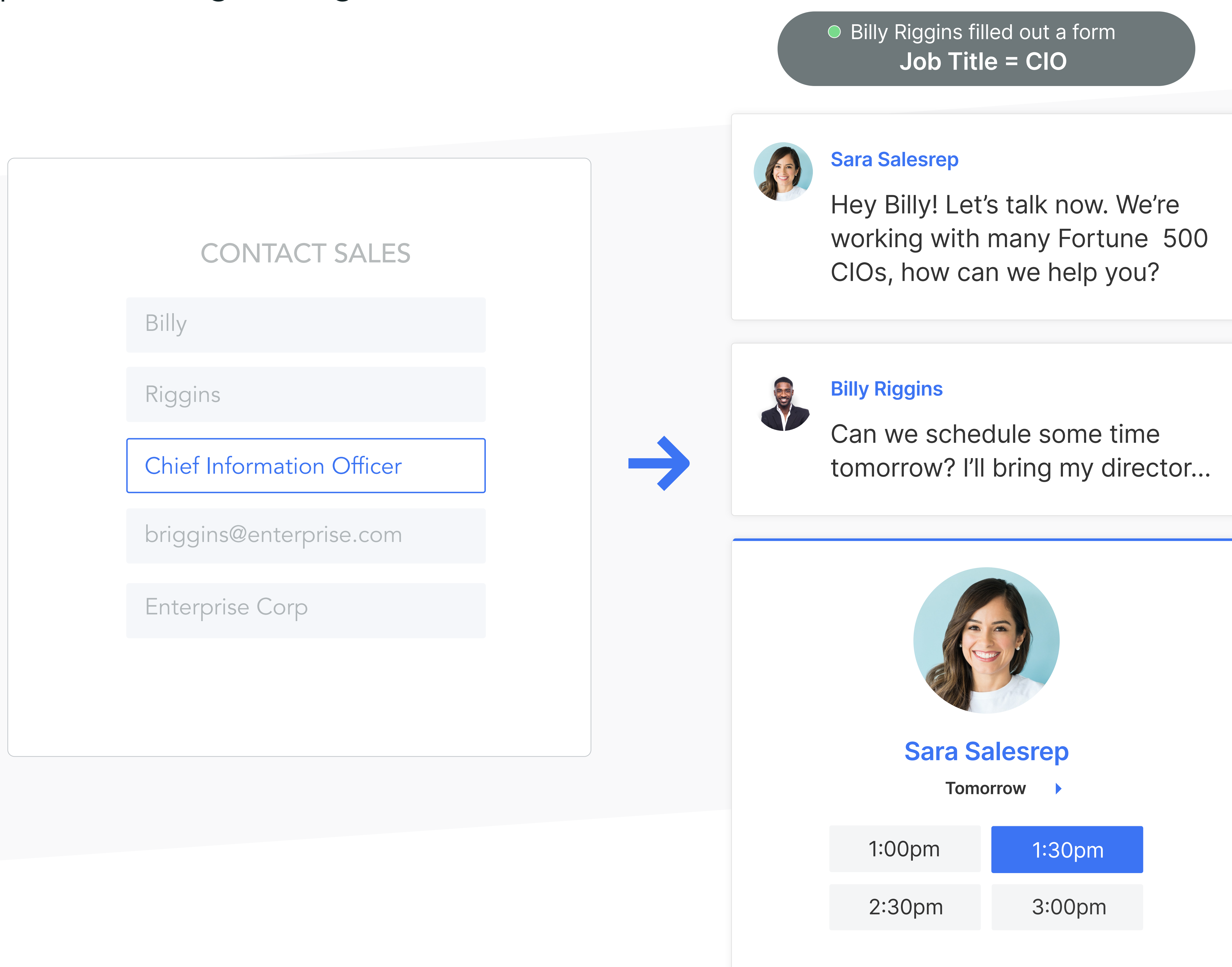


## STRATEGY #2

## Uplevel your forms to improve website conversions

When someone fills out a form on your website, how long does it take for someone on your team to get in touch? Remember, speed to lead is everything. With Conversational Marketing, you can instantly invite qualified visitors to talk live.

You can give qualified visitors (not everyone!) the option to “skip the line” and bypass a form. Or, once someone fills out a form, you can ask them to talk right now. If they have just submitted a form, you can even use data from the form to route conversations and personalize greetings.



## DID YOU KNOW...

If a sales development rep can schedule a meeting with a lead the same day that a lead came in, the close rate is 3X higher than if they connected 48 hours later.

- [Salesforce](#)

## STRATEGY #3

## Deliver hyper-personalized experiences to Leads and Contacts

With Salesforce, you have so much data at your fingertips, so use it! When any known Lead or Contact comes to your site, greet them with a personalized sales conversation. This will help you move more people through the buying journey, faster than ever before.

Here's how it works. When Leads or Contacts arrive, automatically surface relevant information in your Conversational Marketing platform. For instance, you can show a Lead or Contact's title, company name, and employee count. You can also go beyond the basics and show things like Lead Source or Einstein Behavior Score.



● Ashley Keane on the site now  
VP of Data, Tesla  
10,000+ Employees  
akeane@tesla.com





Then, pair this Salesforce data with your Conversational 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*.

Use all of this information to shape tailored sales conversations. Start with a personalized greeting, then quickly serve up content that you think would be relevant to them based on who they are and their stage in the customer journey. The result? Increased engagement and higher likeliness to progress to the next stage in



● Brandon Adams on the site now  
VP of Marketing  
Retail Industry  
Viewing Product Page  
badams@modern.com



Sam Salesrep

**Welcome back, Brandon!**

I thought you might find this new report helpful: [The Top 10 Ad Strategies for Retail Marketers](#). Want to talk about how you can take your ad game to the next level?

“



The ability to use Salesforce data to create super personalized, customizable experiences is a game changer.

- Keegan Thomson, askSpoke



## STRATEGY #4

## Use Salesforce data to intelligently route conversations

Because you know everything about your website visitors, you can use your Salesforce data to route conversations. Here are some examples:

**If Lead score is hot, immediately route them to your sales reps.**

If someone has shown buying intent by engaging with your email campaigns or marketing content, get them connected with a live sales rep as soon as possible.

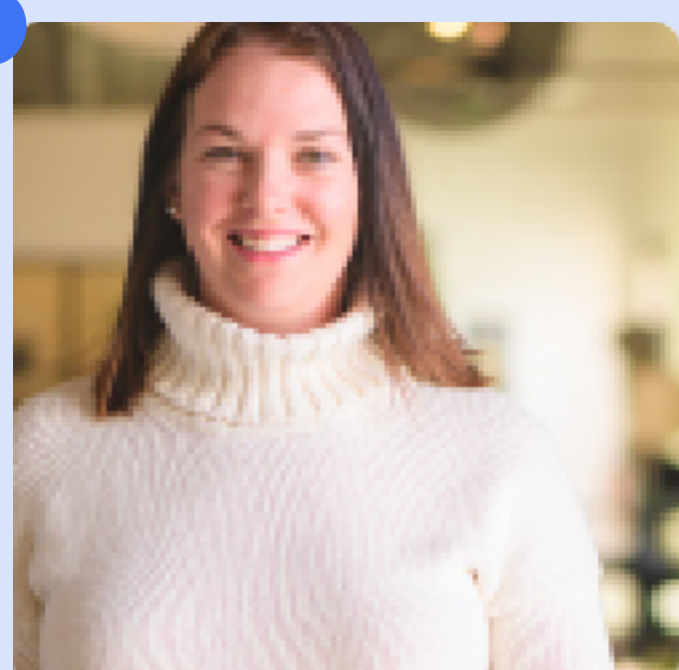
**If company size is greater than 1,000 employees, send them to your enterprise team.**

Big companies have complex buying needs, longer sales cycles, and bigger budgets. If your sales team is aligned by company size, route enterprise website visitors to enterprise reps who understand their needs.

**If industry is food & beverage, send them to industry specialists.**

If you specialize in certain industries, immediately connect website visitors with industry specialists who understand their unique needs.

“



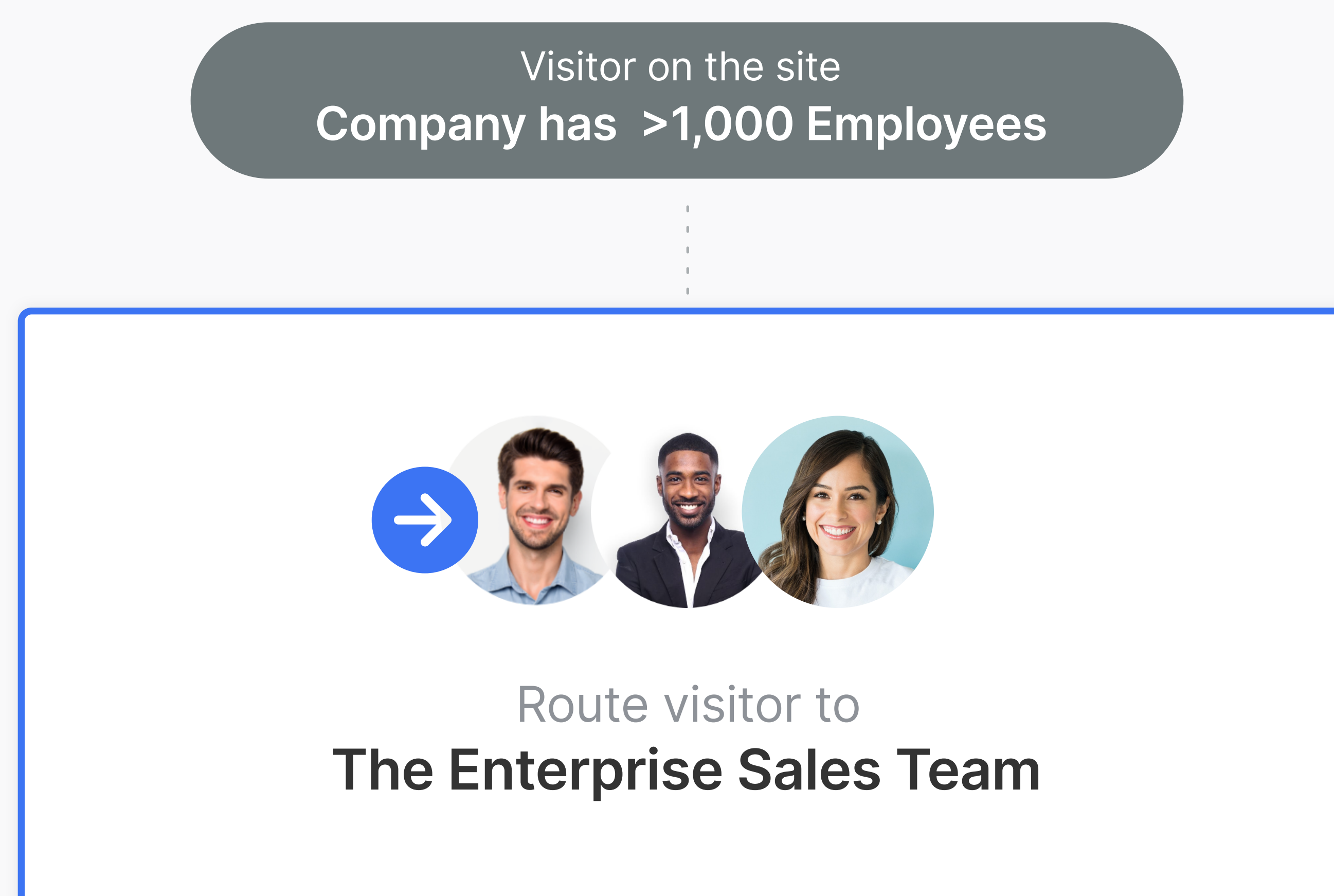
We know we have high win rates in certain industries and can use Conversational Marketing to serve up hyper-relevant, custom experiences to those visitors.

- Emily Carpenter, Brandfolder



You can get really specific with your routing rules; for instance, you can identify which reps you fallback to when other reps are unavailable. Plus, you can control which reps meetings are scheduled with.

By using Salesforce data to intelligently route conversations, you can deliver personalized customer experiences and set your reps up for success.



#### DID YOU KNOW...

72% of B2B customers expect a deep understanding of their needs, reflected through personalized experiences.

- [Salesforce](#)

## STRATEGY #5

## Roll out the red carpet for Account-Based Marketing (ABM) target accounts

It's not just about Leads and Contacts, it's also about Accounts! With Conversational Marketing, you can engage with your Account-Based Marketing (ABM) target accounts the moment they arrive on your site.

ABM is a key strategy used by B2B businesses today. In fact, The SiriusDecision State of ABM Study shows that companies who invest in ABM see a 24% faster growth in revenue and 91% larger deal sizes.

The goal of ABM is to engage key, target accounts. When you finally get a target account on the hook and to 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 Conversational Marketing, you can engage with ABM target accounts the moment they arrive on your site. This means more conversations with the companies you care about most.

“



Thanks to Conversational Marketing, we're having 10X more conversations with diamond accounts. This is ABM at its finest.

- Scott Holden, ThoughtSpot



Here's how you can use Conversational Marketing to engage and convert ABM target accounts:

- Know the moment a person from a target account arrives on your site
- Immediately notify the Salesforce Account Owner, or their supporting business development rep, then route the conversation
- Surface all relevant Salesforce Account data, including company name, size, or Opportunity information
- Surface any additional ABM data, like tier or purchase phase
- Give your visitor a VIP website experience; let them know you're standing by to help and invite them to meet with you immediately

www.company.com/abm-page

The screenshot shows a website interface with a sidebar on the left and two chat bubbles on the right. The sidebar is dark gray and contains the following information:

- Tesla logo: Tesla is on the site Target Account
- Charlie Tucker: VP Operations, \$250M Revenue, Consideration Stage, Open Opportunity, Owner: Sara Salesrep

The two chat bubbles are white with rounded corners and contain the following information:

- Sara Salesrep**: Greetings, Charlie! Our team is standing by to talk about how we can help Tesla.
- Charlie Tucker**: How do you differentiate from your competition?

## STRATEGY #6

## Nurture open opportunities and close more deals

Last but definitely not least, let's talk about one of the most important objects in Salesforce: Opportunities! Conversational Marketing isn't just a channel to generate new leads, it's also a touchpoint to engage with buyers that are in an active sales cycle.

Using Conversational Marketing, you'll know exactly when an open Opportunity is on your website. This is an important moment! Use this as a chance to connect with your buyer and nurture the deal. Invite your buyer to talk right now, or book a meeting with your team if appropriate. By using Conversational Marketing, you will position your company as accessible and helpful. In turn, you'll give your sales team more contact with serious buyers.

Name	Rebecca Westin
Title	VP Operations
Company	Nike, Inc.
Opportunity	Enterprise, \$48k
Close Date	September 30
Owner	Sara Salesrep

**Welcome back, Rebecca** 🎉

We know you're working with our team already. We're standing by and ready to help you and the Nike crew.

[Let's Talk Now](#)

[Book a Meeting](#)



# Reporting on the Business Impact of Conversational Marketing in Salesforce

## Conversational Marketing directly impacts your bottom line

Conversational Marketing has a direct business impact. It helps you generate more leads than forms alone, more pipeline because you're having instant meetings with qualified buyers, and more revenue because you can connect with target accounts and open opportunities.

A popular Salesforce phrase is "If it's not in Salesforce, it didn't happen." It's critical that you're reporting on your Conversational Marketing program with Salesforce Reports and Dashboards. Here are the common Conversational Marketing metrics that companies measure:

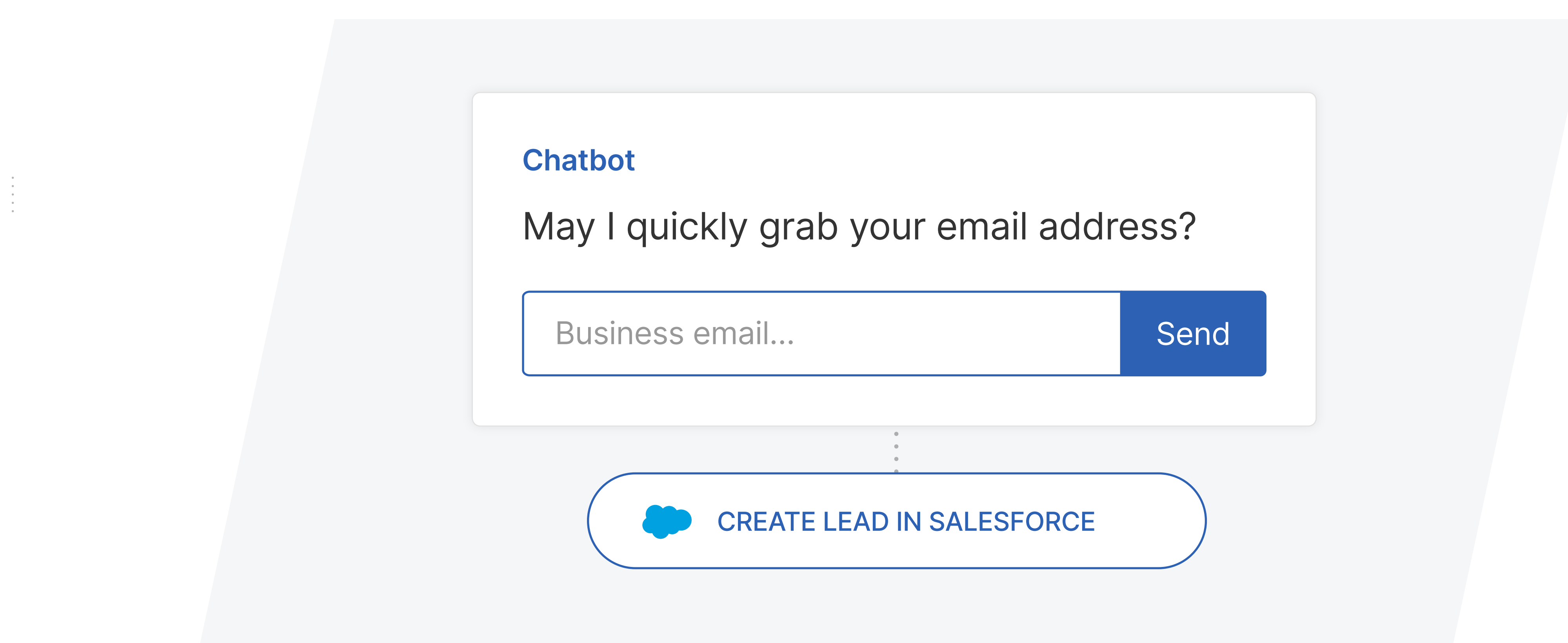
- Sales Conversations
- Leads generated
- Meetings booked
- Pipeline created
- Opportunities influenced
- Revenue

There are two key steps to reporting on Conversational Marketing in Salesforce.

**STEP #1**

## Map data into Salesforce

Once you connect your Conversational Marketing program with Salesforce, you can push new Leads into Salesforce or update existing Leads and Contacts. By pushing this information into Salesforce, you are equipped to build valuable Conversational Marketing Reports and Dashboards.

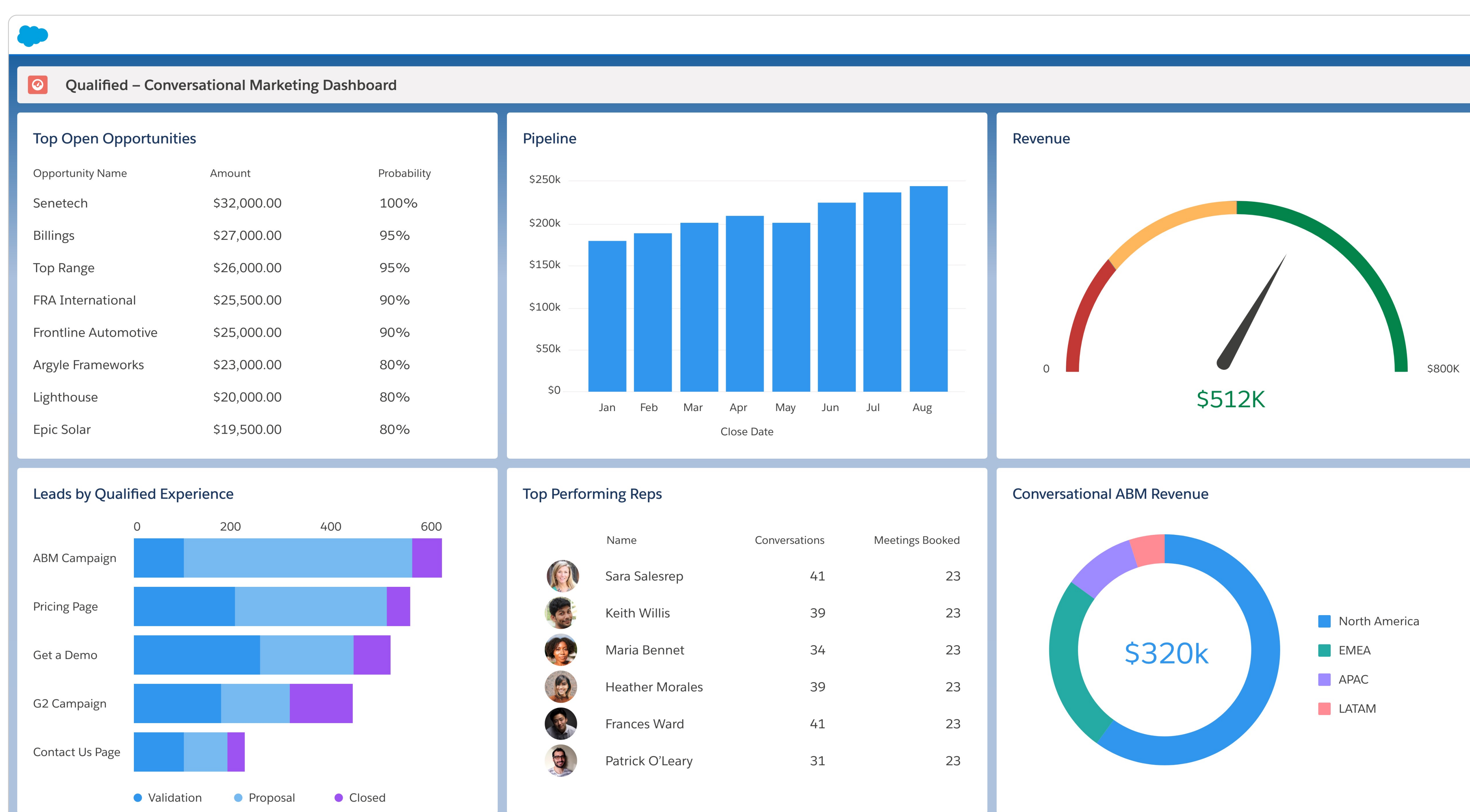
**STEP #2**

## Build Salesforce Reports and Dashboards

Once you've mapped data into Salesforce, you can start building Salesforce Reports and Dashboards, giving you a strong grasp on how Conversational Marketing is impacting your business. You can build standalone Conversational Marketing Dashboards, or report on performance within the context of broader Marketing Dashboards.



In a Conversational Marketing Dashboard, you could show how chatbots and live chat have influenced pipeline, opportunities, and closed business. You can also have a leaderboard that shows sales reps' volume of conversations and meetings booked.



Having this data inside of Salesforce makes it easy to see the ROI on your Conversational Marketing investment and circulate metrics with stakeholders throughout your organization.

“



By using Conversational Marketing with Salesforce, we drove 50 solid opportunities and nearly £1million in revenue within months of go-live.

- Joe Leverson, Gamma



# Assessing a Conversational Marketing Solution

What you need to succeed with Salesforce

## A Solution Purpose-Built for Salesforce

- ☐ Instantly know when Leads or Contacts are on your site
- ☐ Read and update any standard and custom field (all data types)
- ☐ Trigger website experiences based on Salesforce data
- ☐ Run full-cycle Account-Based Marketing programs with Salesforce
- ☐ Route conversations based on Salesforce ownership or User lookups
- ☐ Track attribution and influence with Connected Campaigns
- ☐ Real-time reporting with Salesforce Reports & Dashboards
- ☐ Support the complete Salesforce data model including Accounts, Contacts, Opportunities, Leads, Campaigns, Activities, Users)

## Integrated to Salesforce Pardot for B2B Marketing

- ☐ Ability to read and set Salesforce Pardot website cookies
- ☐ Support for Pardot classic and Lightning configurations
- ☐ Works with 100% of Pardot functionality including all Campaigns, Emails, Sequences, Forms, Landing Pages, and Dynamic Content

## Other Important Considerations

- ☐ Is your customer success manager Salesforce Admin certified?
- ☐ How many 5-star customer reviews on the Salesforce AppExchange?
- ☐ Has Salesforce invested in the company's success?



# Qualified is the #1 Conversational Marketing App for Salesforce

Qualified is purpose-built for companies that use Salesforce and laser-focused on helping you build more pipeline and close more deals. Thousands of the world's leading Trailblazers use Qualified's Conversational Marketing platform to grow sales.



## What a great experience

Qualified is flexible and configurable for a variety of use cases including supporting our ABM efforts. Implementation is quick and easy and the team is very receptive to feedback. It's a pleasure working with them.



**MJ Craig**  
Marketing Director



## Blown away!

The integration with Salesforce is so seamless and the possibilities are seemingly endless. I can't go far enough in articulating what a great tool this is and in particular the positive change that it's driving within our sales and marketing organization.



**Liam Taylor**  
Marketing Director



## A total game changer

We're using Qualified to increase conversions on our website. After purchasing, we were live within 2 weeks. The success team has been wonderful to work with and the onboarding could not have been any easier.



**Natasa Marinkovic**  
Business Development

## The trusted enterprise platform

