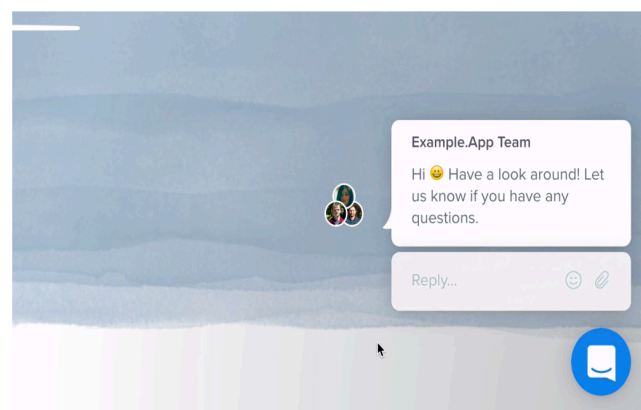


Intercom chat How to and Best Practice Guide

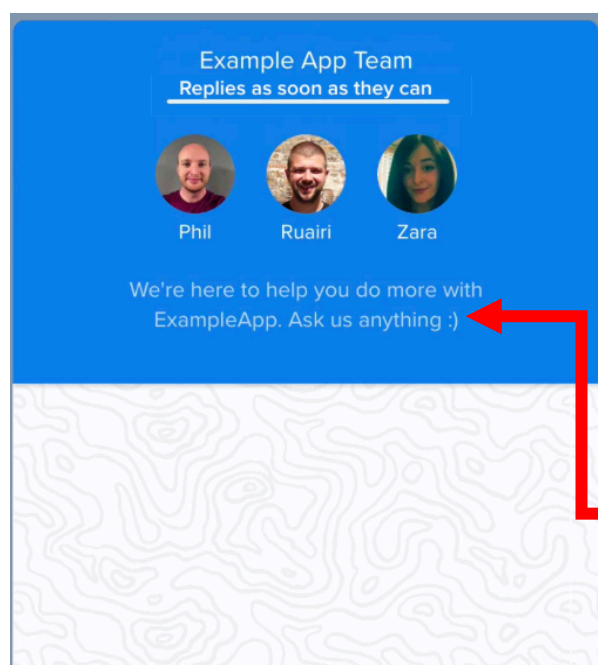
How Visitors Can Contact you Directly

Once acquire is installed on the StayNTouch site, visitors will see an intercom messenger on the lower right hand corner with an automated team welcome message by default. (Change chat icon to match brand color scheme).



Visitors are prompted to give their email address as soon as the chat box is visible. They may choose to bypass and continue chatting with a team member but an email field will remain visible, giving them the option to get replies via email and continue the conversation from there.

Users can see how long they can expect to wait for a chat reply with the **expected response time feature**.



- Great for managing user expectations
- Can automatically be calculated by your teams average response time
- Can also be set to a fixed time
- Your response time should not extend the average time a visitor typically spends on your website.
- Include a short, friendly, and personal message, no longer than 20 words long.

Trigger Automated Chats Based on Visitor Activities

Start targeted chats with visitors when they match rules you set.

Ex: If a visitor visits the product page a number of times, they may be showing interest and signs of making a purchase.

- Set up a message that triggers when a visitor visits the product page for the 2nd time
- Perfect time to give them more information about the product (offer a discount or send them a case study or product video)
- Always offer to answer any of their questions or concerns. Human conversation is key to conversion
- If they reply with questions, give them what they need in real time to help them take the next step

Setting Up a New Visitor Auto Message

Ex: Message a visitor who stays on pricing page for more than 2 minutes.

1. Create a new visitor auto message.

OPENED	CLICKED	GOAL	REPLIED	LAST SENT	CREATED	FIRST SET LIVE
100%	0%	—	14%	20 minutes ago	18 hours ago	18 hours ago
96%	0%	—	48%	34 minutes ago	3 days ago	3 days ago

2. Name your message

New Visitor Auto Message [Delete message] [Save and Close]

1 Name your message [Done]

Offer help

2 Rules

3 Message

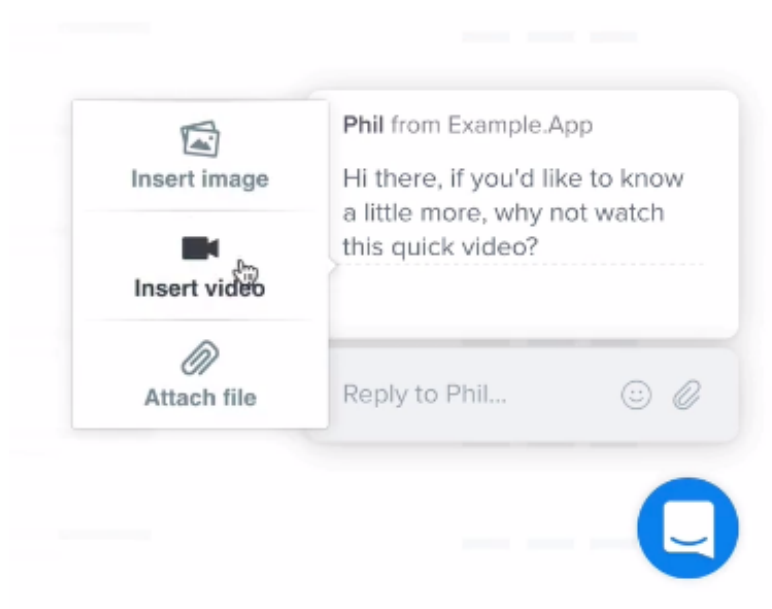
4 Set a goal (OPTIONAL)

5 Review and send

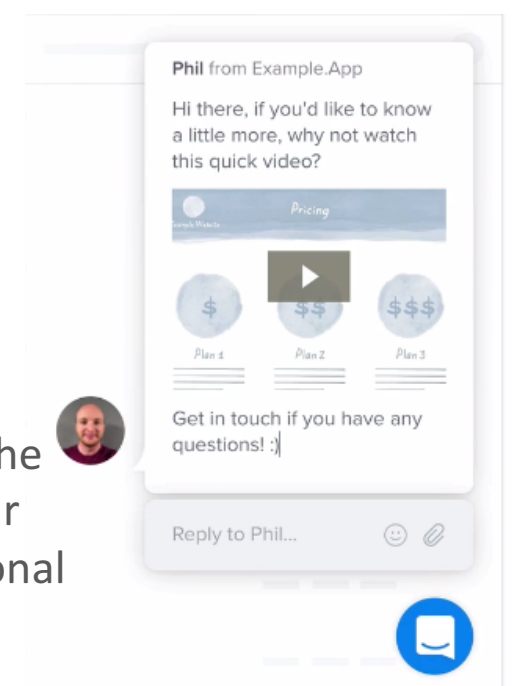
3. Set the if/then rules to say stayed on page for more than the desired time

IF Time on current page is more than 120 seconds

THEN Send a chat from Phil Byrne and assign replies to Nobody



4. Deliver them the content you want. Send a video, image or additional content piece



5. Prompt them to take the next action and offer your assistance for any additional questions.

Get even more specific with **rules** by combining as many as you'd like to make sure the automated messages are sending to exactly the right visitor at the right time

IF Current page URL contains /pricing

AND Time on current page is more than 120 seconds

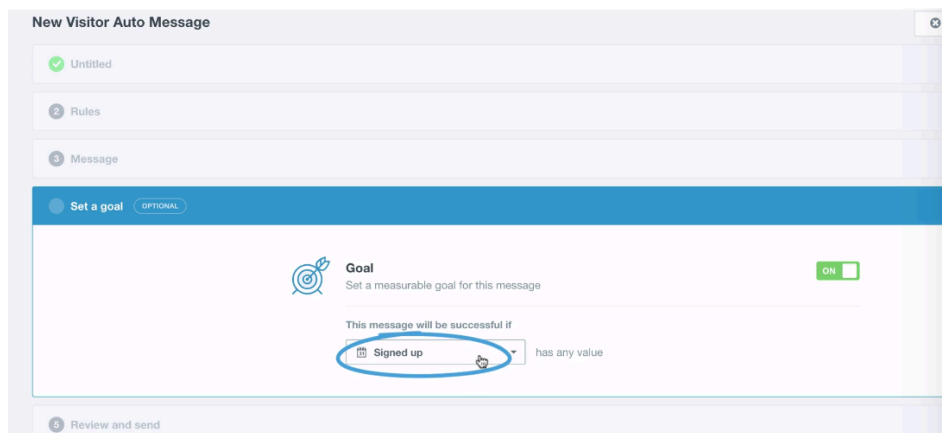
AND Number of page views for www.exampleapp.io/pro is 2

THEN Send a chat from Phil Byrne and assign replies to Nobody

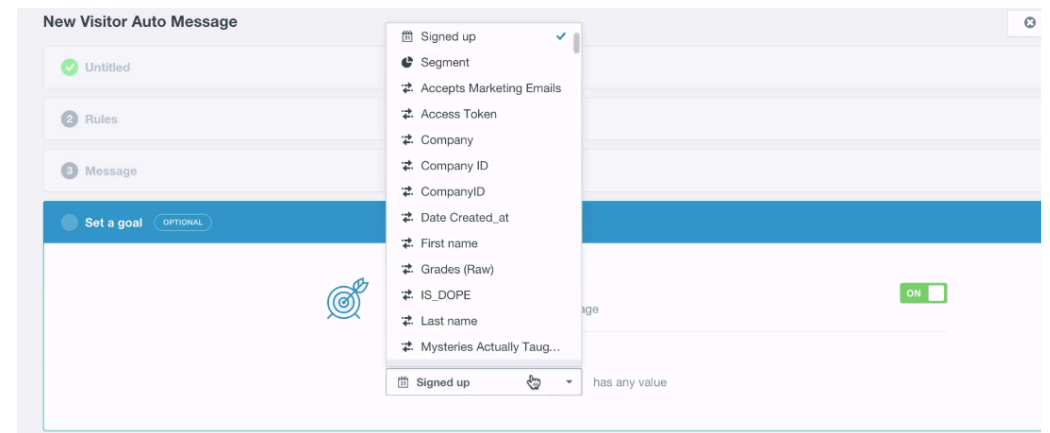
Measure The Effectiveness of Visitor Auto-Messages Using Goals

Ex: Goal is to measure sign ups/leads

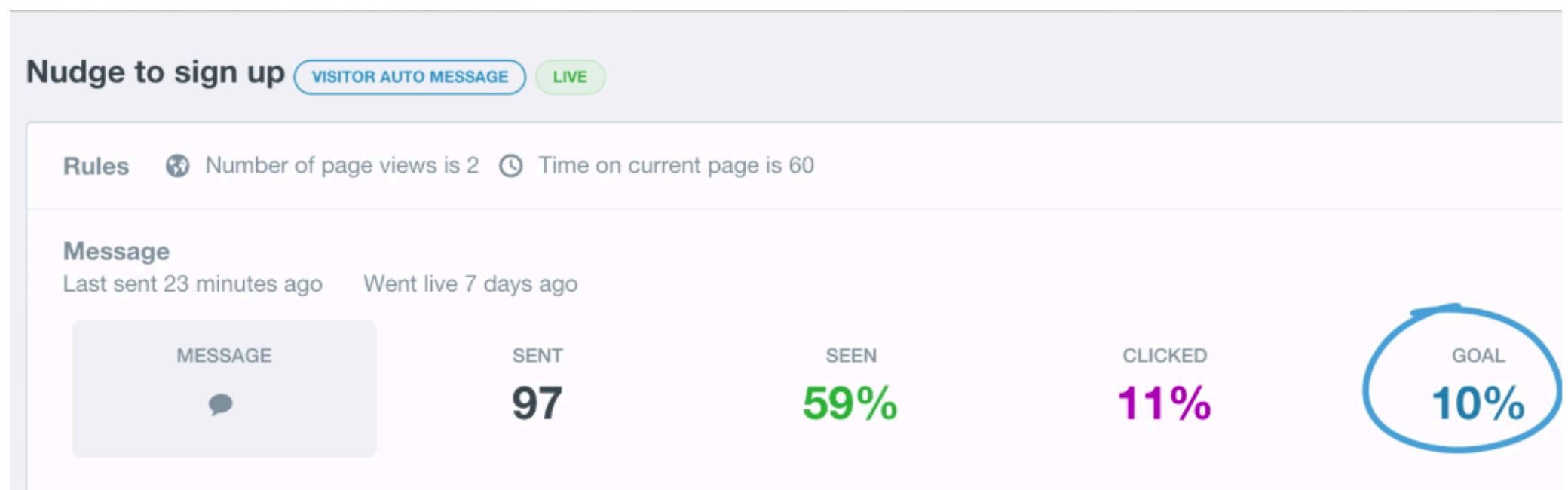
1. Identify sign-ups as goal for messages



2. Message goal can be based on any data tracked in intercom



3. See the percentage of messaged recipients that signed up after getting the message.

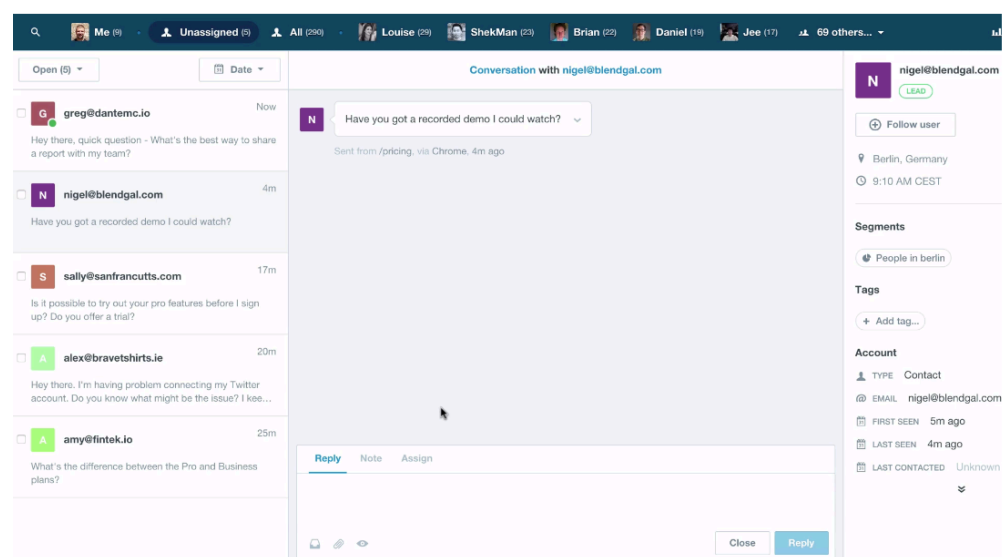


*All intercom functionalities are also optimized for mobile

How to Manage Chats in the Conversations Inbox

When a visitor to the site sends you a message or replies to a visitor auto-message, it will be visible in your conversations inbox.

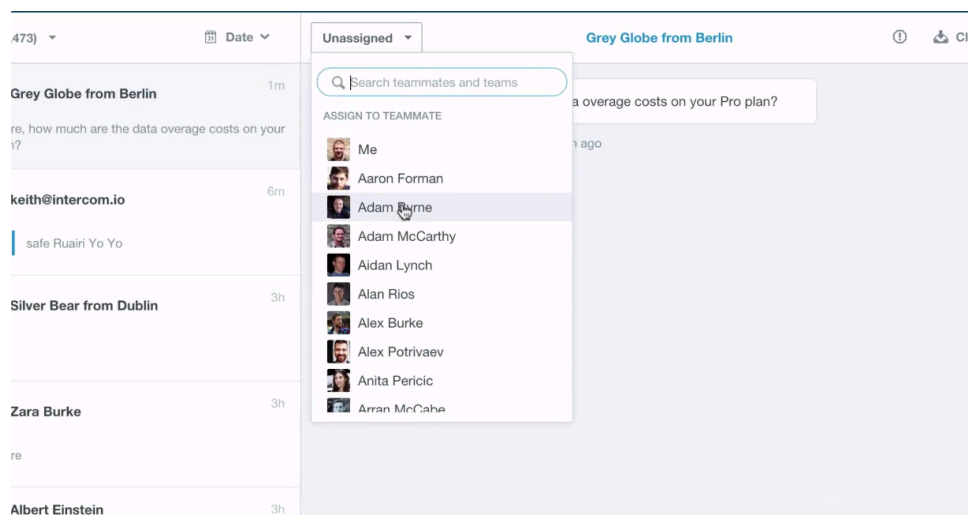
- Timely responses is key to converting visitors into leads or sign-ups
- Inbox is live so you can see which visitors are online and you'll receive notifications when they message you or respond to a chat
- You can also see when a teammate is taking action on a conversation in real time



*Each visitor profile gives you lots of great information i.e the last page they visited on your website

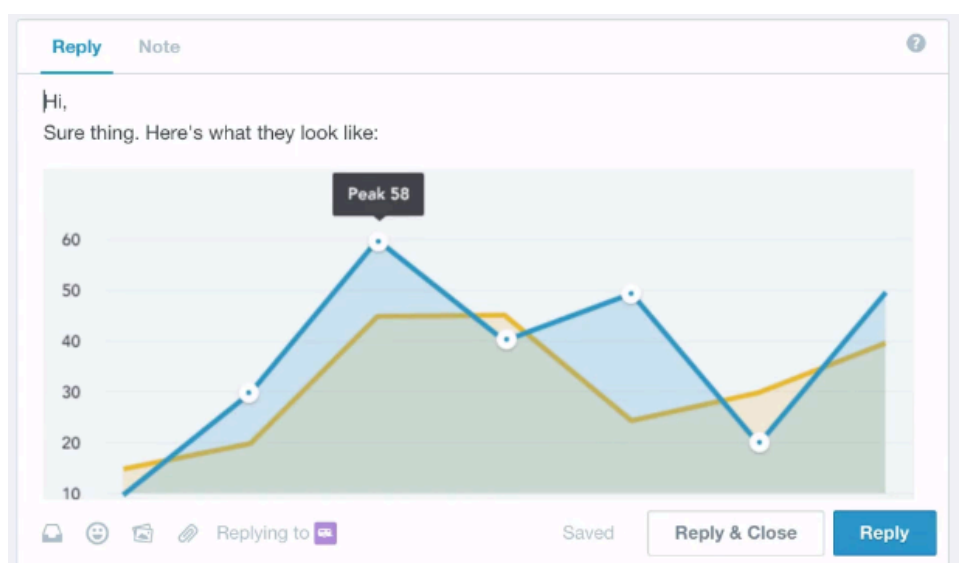
How to Manage Chats in the Conversations Inbox (continued)

All team members can have individual inboxes in addition to the team inbox to help manage queries and even assign queries.



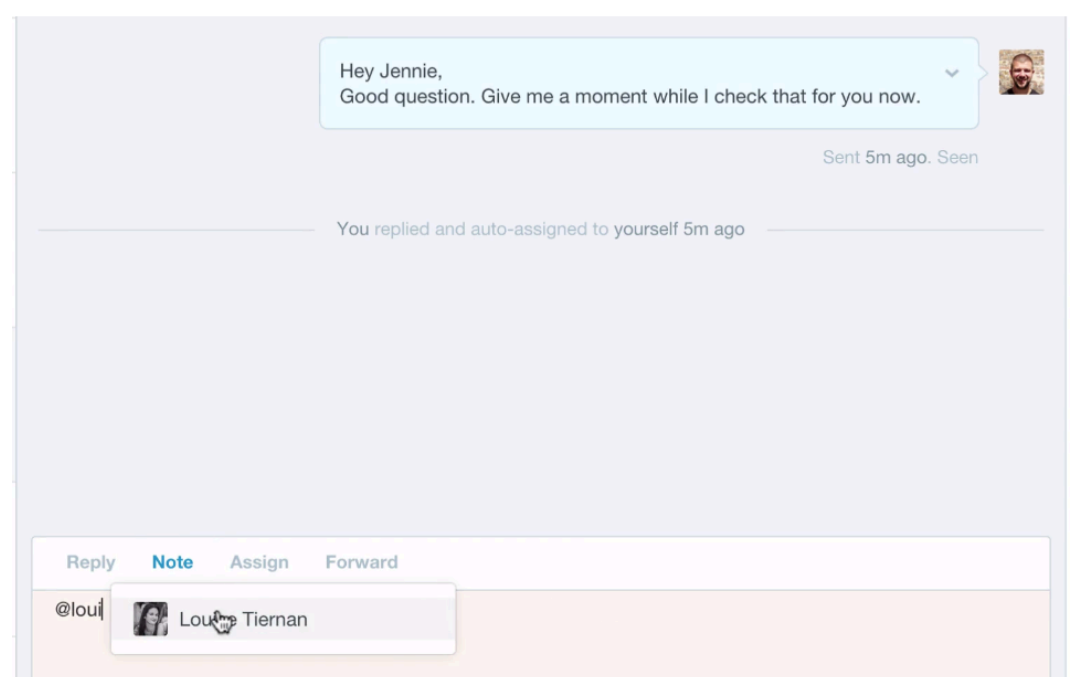
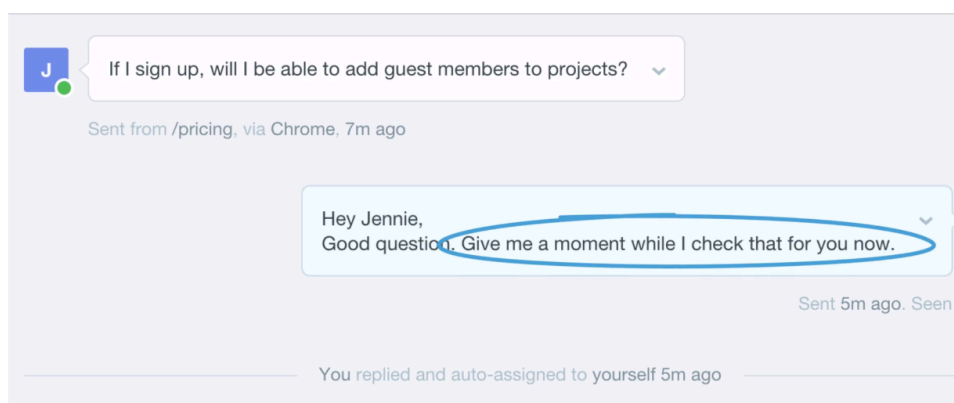
- All price queries can be assigned to the sales team
- All technical queries can be assigned to the support team, etc
- Queries can also be assigned to individual team members
- Auto-assign all replies to a visitor auto-messages to a particular person or team

It's always better just to show what you mean rather than give lengthy explanations during a conversations



- Drag and drop files from your desktop to better illustrate your replies when chatting with a lead
- Add gifs and emoji's to lighten up the mood and be more personable
- Format your messages to look any way you like with custom text editors

Communicate with your Teammates when you need help addressing a question or concern a lead may have

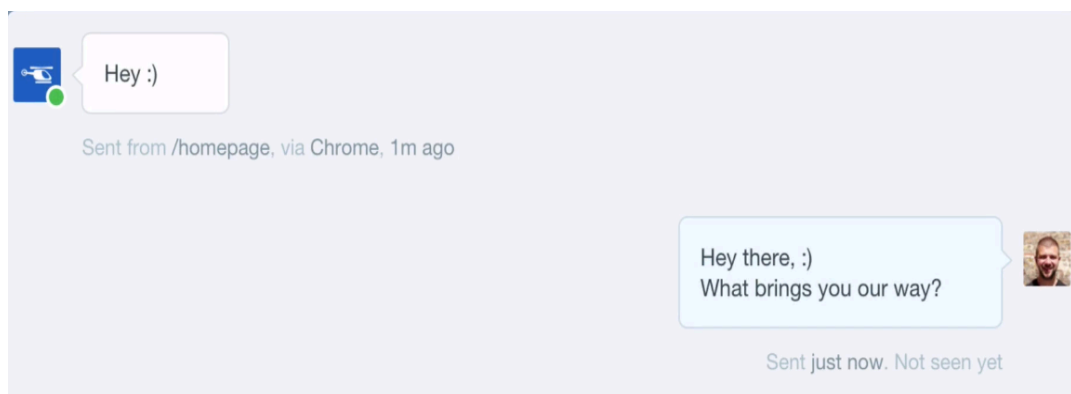


You can leave a not on a conversation, use an '@' mention to notify a teammate who can write back to you Instantly or reply to the lead directly

Best Practices for Converting Visitors to Leads

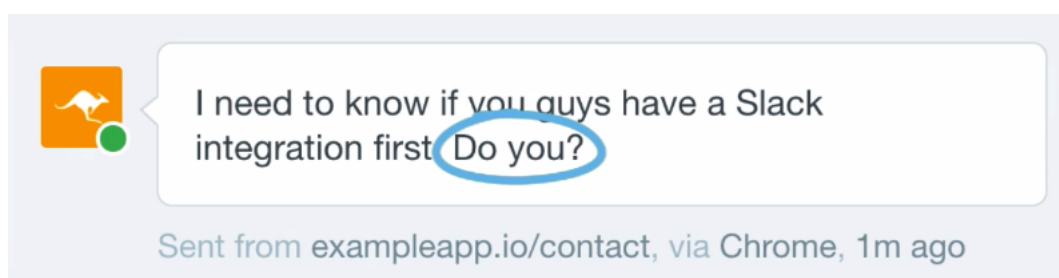
Tip #1: When a visitor sends you a message and is asking you a question, you need to get clear on the context quickly.

Ask the right questions in the opening exchanges

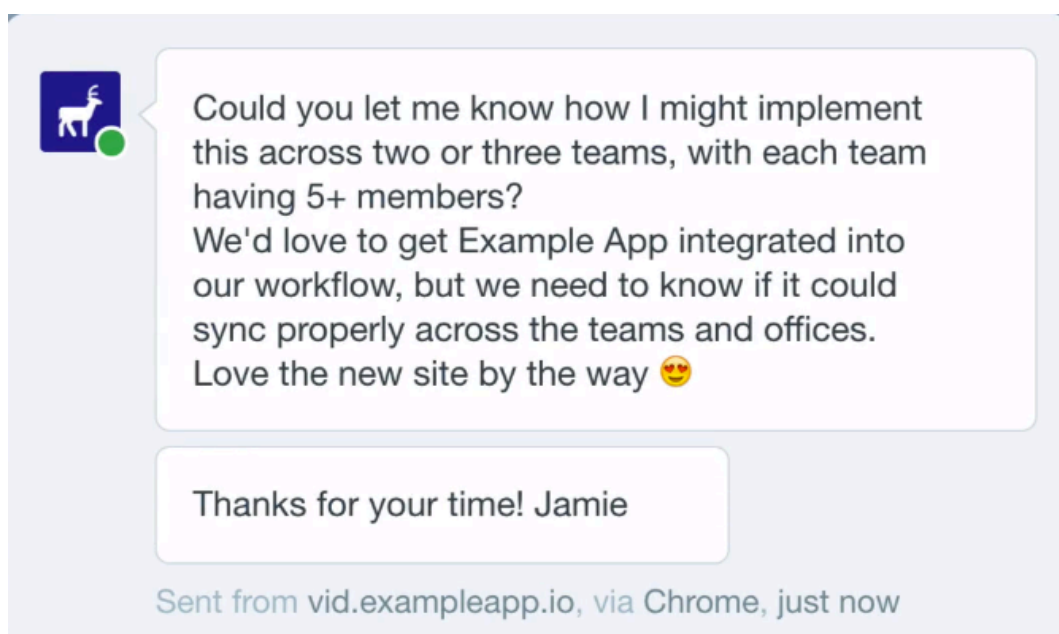


- Begin by asking a leading question i.e 'what brings you our way?' or 'what barriers do you have at the moment?'
- Quickly identify pain points and work to address them and avoid any unnecessary chit-chat
- Pay attention to user profile panel to understand their activity behavior and ask related questions

Tip #2: Once you have context of the scenario you're dealing with, make a quick call on the urgency of the visitor's query: determine whether they favor speed or detail.



- If there's a sense of urgency in the person's tone, a short and immediate reply is best.
- Encourage them to ask any additional questions if needed



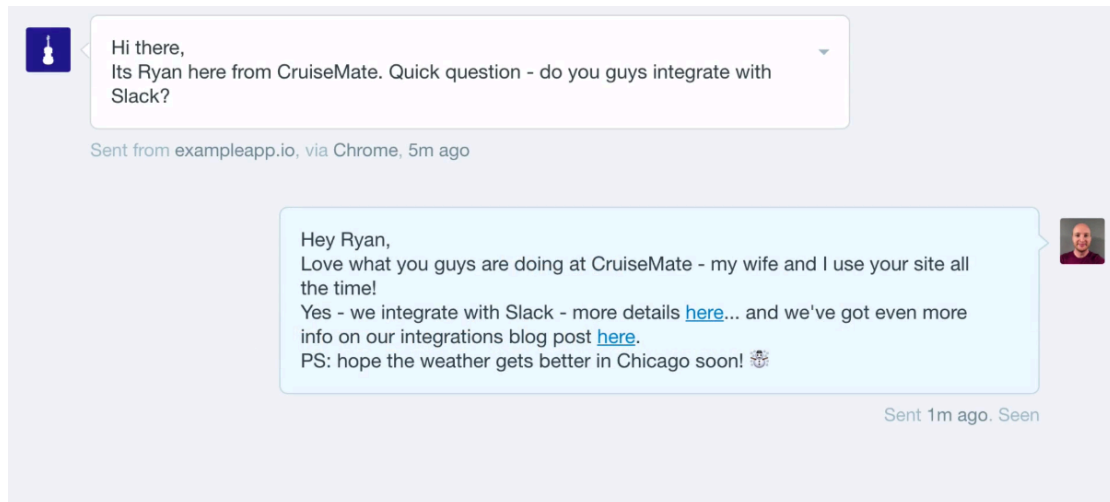
- A visitor who sends you a message that's more relaxed or inquisitive may warrant a more detailed, conversational response.
- Their query may not be as urgent so the response can be a little slower
- Use this opportunity to engage the visitor with additional content or promote an event they may be interested in (link to an upcoming webinar)

Tip #3: Keep your replies short where possible

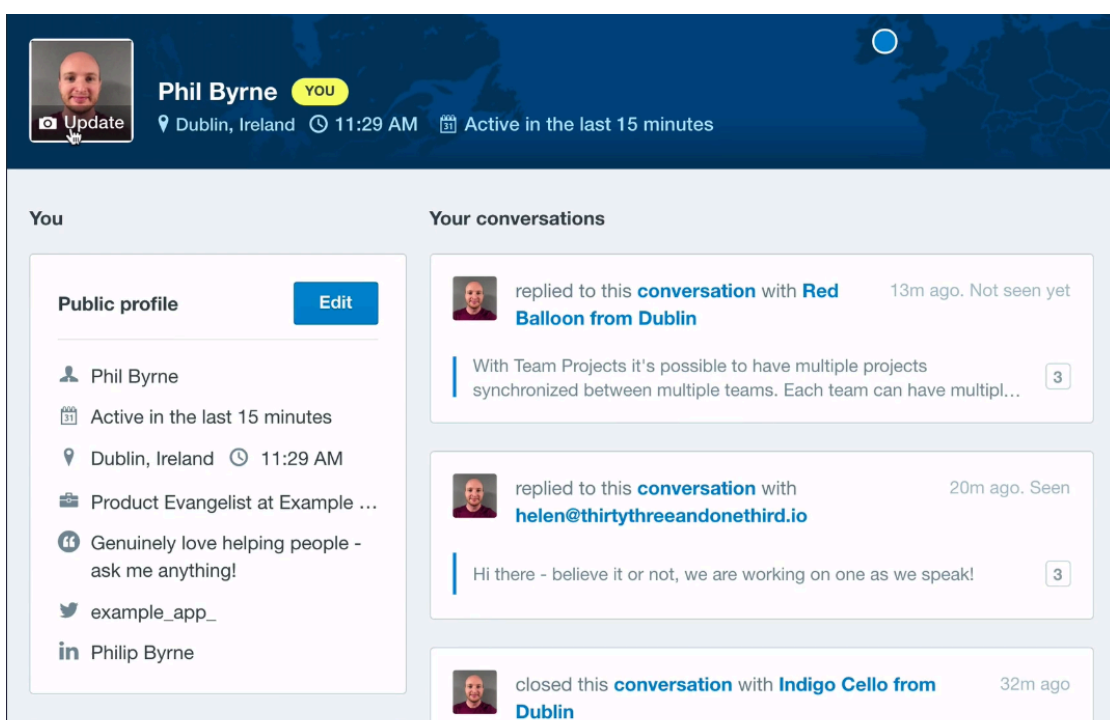
It is always best to try to keep your replies short while still answering every question or concern that the visitor has. Short messages are clearer and easier to digest in a chat scenario. Aim for a snappy, back and forth exchange and always prompt the visitor to take the next step with a link

Best Practices for Converting Visitors to Leads (continued)

Tip #4: Aim to build a human connection

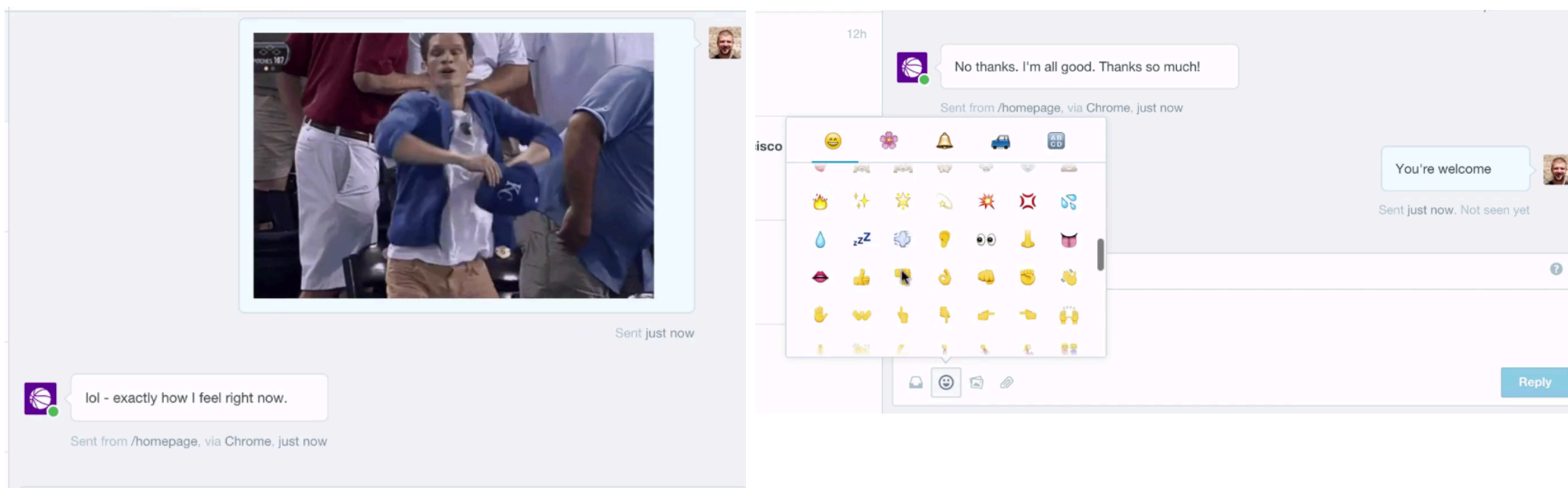


- Provide a positive, warm, and personal exchange
- Personalize the response by using the visitor's name or referencing something specific to the visitor
- You can use the saved reply feature to copy and paste responses but make sure to edit the messages to make it personal to the visitor.



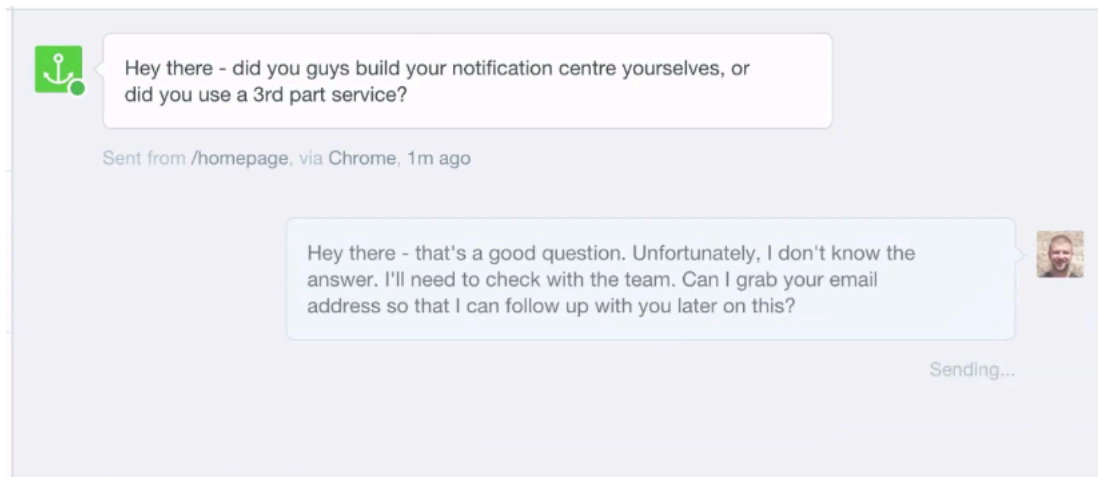
- Use a smiley, happy photo of your face as your profile pic
- Do NOT use your company's logo or a team or your dog
- Add a brief description of your role at StayNTouch
- Add your social profile
- This lets your visitors know that there's a real human being on the other side of the conversation and they'll trust you more because of it

Have FUN! Use emoji's, stickers and gifs to be expressive when chatting. Your visitors will be more likely to continue the conversation because of the warm tone and they'll feel more comfortable reaching out again in the future.

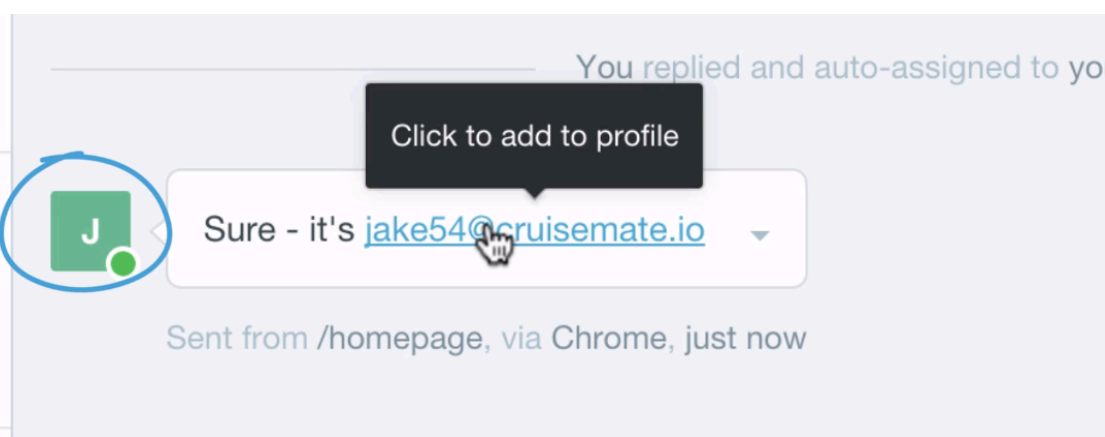


Best Practices for Converting Visitors to Customers (continued)

Tip #5: Capture their email address



- When a visitor sends you a message, intercom prompts them to leave their email address but sometimes they may not do it themselves
- In that case, ask them for their details so you can follow up on the conversation
- You could offer to follow-up later with some supporting content, or reply to a question that you couldn't answer there and then



- Once you receive their email, click to add it to their avatar change from an anonyms symbol to there initials
- Anytime your reply to them once they've left your site, they'll receive notifications via email
- The conversation continues...

Tip #6: Be more available. Use inbox on mobile!

- You can reply to visitors anywhere and anytime. Get push notifications when visitors send messages and respond promptly.

Tip #7: Keep track of how your doing

Your visitor auto message performance

TITLE	FROM	OPENED	REPLIED
Welcome message		51%	12%
Pricing enquiries		53%	6%
Switching video		41%	6%
Hiring page		53%	6%
Checkout page		43%	5%
Average visitor auto message performance (based on all visitor auto messages sent through Intercom)		30%	5%

- In addition to tracking your message goals, track the open and reply rate of all of your automated messages
- Compare how your company messages are performing with other companies and see how many conversations are happening with leads

*Well targeted visitor auto-messages should see a minimum open rate of above 30%.

*If a question is being asked, aim for at least a reply rate of above 5%

*Total conversation history and visitor activity history is saved and visible at all times