

# THE CONVERSATIONAL MARKETING BLUEPRINT WORKBOOK

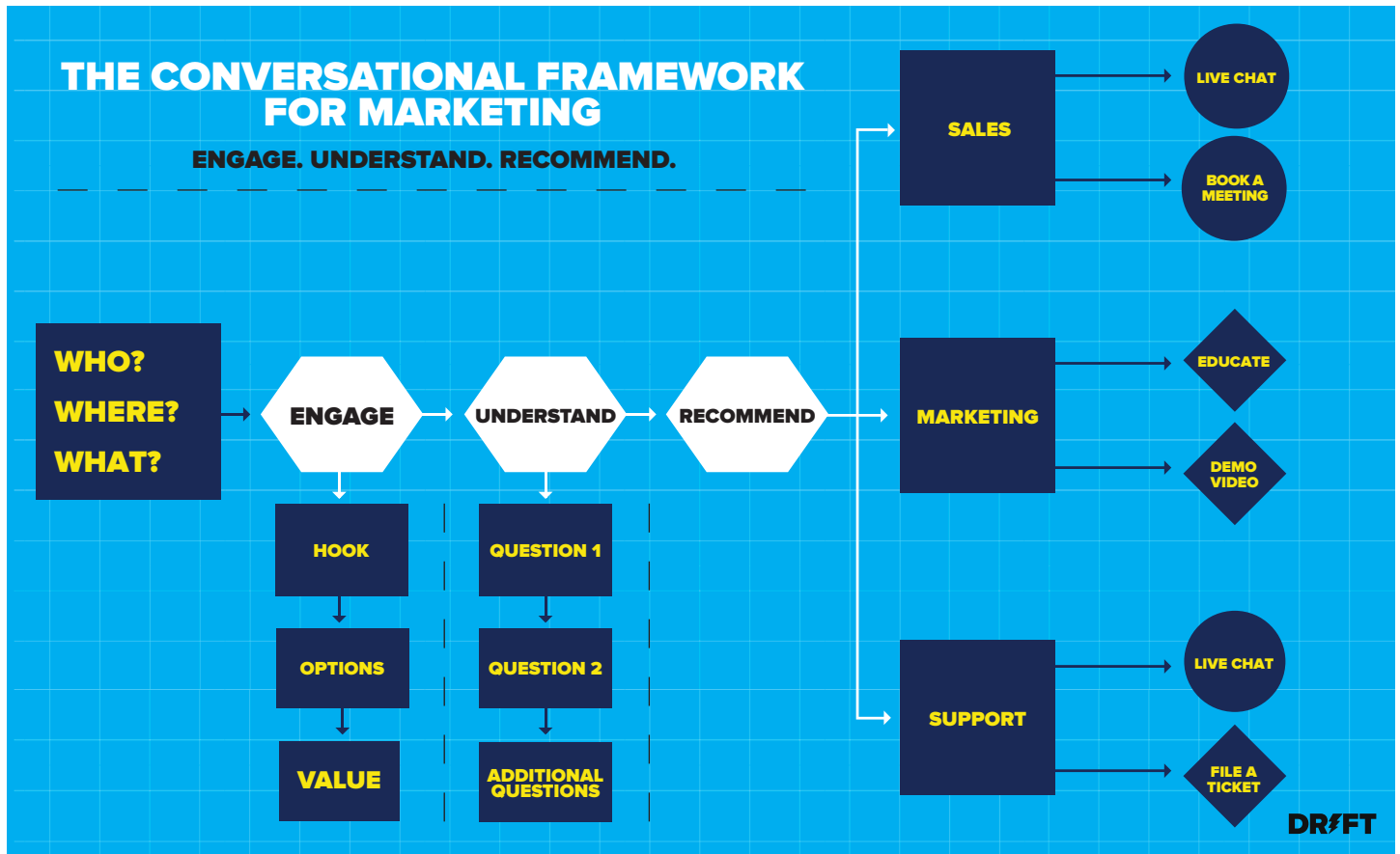
2nd Edition  
ALL NEW  
CONTENT

Conversational marketing creates instant and personalized engagement with customers and buyers. It accelerates business revenue by removing friction from the customer experience.

Build conversational experiences and design conversations that accelerate your business’s revenue and make buying more enjoyable.

Check out the [Conversational Marketing Blueprint](#) to learn more.

After you’re done with the worksheet, put Conversational Marketing into action and build your first bots with the [Conversational Marketing Worksheet](#).



STAGE 1

# Engage Website Visitors

## WHO

Who are you engaging?

UNKNOWN

KNOWN

RETURNING

## WHERE

Where are you engaging them from?

WEBSITE

## WHAT

What page are you engaging them on?

PRICING

PRODUCT

SOLUTION

RESOURCE CENTER

BLOG

CONTACT US

## WHY

Why are you engaging them?

BUYER OUTCOMES

BUSINESS OUTCOMES

Get Help

Talk to Sales

Learn More

New Lead

Meeting Booked

Sales Activity

## Ranked By Likelihood To Book Meetings

### Chat

1. [Engage All](#)
2. [Book a Meeting](#)
3. [Pricing Page](#)
4. [Visitor Retargeting](#)
5. [Product & Solution Pages](#)
6. [Resource Center](#)
7. [Blog](#)
8. [Contact Us](#)
9. [Landing Page 2.0](#)

### Email

1. [Abandoned Chat](#)

### Video

1. [Visit Follow-up](#)

STAGE 1

# Engage Website Visitors



STAGE 2

# Target Potential Buyers

## WHO

Who are you targeting?

UNKNOWN

KNOWN

RETURNING

TARGET ACCOUNT

SALES ENGAGED

CUSTOMER

## WHERE

Where are you targeting?

CHANNELS

DIRECT TRAFFIC

REFERRAL TRAFFIC

CONTENT SYNDICATION

PAID SEARCH/SOCIAL

DISPLAY ADVERTISING

EMAIL MARKETING

ORGANIC SEARCH/SOCIAL

## WHAT

What are you targeting them with?

OFFERS

WEBINAR

VIRTUAL EVENT

CONTENT

DEMO VIDEO

NEWSLETTER

CALCULATOR

ASSESSMENT

## WHY

Why are you using better targeting?

BUYER OUTCOMES

BUSINESS OUTCOMES

Get Help

Talk to Sales

Learn More

Meeting Booked

Opportunity Created

Sales Activity

## Ranked By Likelihood To Create Opportunities

### Chat

1. [Target Account Experiences](#)
2. [Paid Ad Converter](#)
3. [Personalized Retargeting](#)
4. [Campaigns](#)
5. [Persona Targeting](#)
6. [Conversational Content](#)
7. [Contact Us 2.0](#)
8. [Free Trials](#)
9. [Product Qualified Lead](#)

### Email

1. [Personalized Abandoned Chat](#)
2. [Webinar Invite](#)
3. [Demo Invite](#)

### Video

1. [Webinar Follow-up](#)
2. [LinkedIn Follow-up](#)
3. [First Meeting Follow-up](#)

STAGE 2

# Target Potential Buyers

Ideal Customer Profiles	UNKNOWN	KNOWN	RETURNING	TARGET ACCOUNT	SALES ENGAGED	CUSTOMER		
Channels	Direct Traffic	Referral Traffic	Content Syndication	Paid Search/Social	Display Advertising	Email Marketing	Organic Search/Social	
Offers	WEBINAR	VIRTUAL EVENT	CONTENT	DEMO VIDEO	NEWSLETTER	CALCULATOR	ASSESSMENT	
Website Experience	URL			UTM				
Campaign	CAMPAIGN NAME							
Engage Options	Regular Playbook	Triggered Playbook	Embedded Playbook	Conversational Content	Live Chat	Email	Video	
Engage Hook	<b>ENGAGE HOOK</b> <small>100 characters or less</small>							
Engage Response	I'd like to chat with someone	I'd like to learn more about your solutions	I'm just browsing	I'm looking for customer support				
Primary Call-To-Action	ROUTE TO SALES			DROP A CALENDAR				
Secondary Call-To-Action	MARKETING OFFER	SELF-SERVICE RESOURCE	ROUTE TO CUSTOMER SUPPORT					
Business Outcome	MEETING BOOKED	OPPORTUNITY CREATED	SALES ACTIVITY					
Buyer Outcome	Chat Now	Chat to Call	Zoom Meeting	Book a Meeting	Education	Demo Video	File Support Ticket	Chat with Support

STAGE 3

# Accelerate Deal Cycles

## WHO

Who are you accelerating?



## WHERE

Where are you accelerating?



## WHAT

What are you accelerating them towards?



## WHY

Why are you accelerating?



## Ranked By Likelihood To Accelerate Deal Cycles

### Chat

1. [Open Opportunities](#)
2. [Lead Score Retargeting](#)
3. [Intent Data Optimization](#)
4. [Buying Journey Accelerator](#)
5. [Contact Expansion](#)

### AI-Powered Chat

1. [Website Concierge](#)
2. [Lead Qualifier](#)
3. [Homepage Assistant](#)

### Email

1. [Re-engagement Campaign](#)
2. [Webinar Follow-Up](#)
3. [Group Demo Follow-Up](#)

### Video

1. [SDR to AE Meeting Handoff Intro](#)
2. [Meeting Recap](#)
3. [Proposal Review](#)

STAGE 3

# Accelerate Deal Cycles

