



# HOW A **CHATBOT** IMPLEMENTATION LED TO ENHANCED **LEAD QUALITY** FOR A TAX RESOLUTION COMPANY'S **SALES** TEAM

*In this case study, we discuss how the entire procedure aided us in creating various chat pathways, subsequently subjecting them to review by the client's sales team to enhance the flow of the conversation.*

## KEY METRIC

The integration of a chatbot standardizes processes and elevates customer satisfaction rates.

# 35%

**Increase in chat lead conversion**

## SUMMARY

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In response to the shift towards text-based communication, website chat functionality has become essential for conversions. According to Gartner, by the end of 2020, 85% of business engagements occurred without human interaction. A US Tax Resolution company with a nationwide customer base saw significant traffic through various channels. Their website featured multiple Call-To-Action (CTA) prompts for phone consultations and form submissions, alongside a live chat option for real-time assistance.

## BUSINESS CHALLENGES

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There was a noticeable surge in users favoring chat as their preferred method of contact on the website. During specific high-traffic periods, the wait times with the existing agents experienced a considerable increase, making it challenging to maintain the right number of available agents. As a result, the company resorted to hiring an outsourced team of agents to manage the traffic and provide after-hours support. Nonetheless, this approach had its limitations, particularly in terms of chat response quality and the resulting chat-to-conversion rate.

## SOLUTION PROVIDED

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Our initial step involved a thorough analysis of the existing chat logs and an in-depth examination of conversation dynamics. Subsequently, we meticulously processed this data to extract valuable business insights. This comprehensive procedure enabled us to devise various chat pathways, which were subsequently subjected to a rigorous review by the client's sales team, with the ultimate goal of enhancing the conversational flow.



**Improved rate of resolving customer queries.**



**Lower operational cost**



**35% increase in chat lead conversion**

Utilizing the insights gleaned from this process, we proceeded to develop a chatbot equipped with a carefully crafted set of pathways, ensuring that users could seamlessly access the solutions they were seeking.

The fundamental operational sequence of the chatbot was as follows:

1. Commenced by initiating the conversation with the inquiry, "How may I assist you today?"
2. Based on the user's response, the chatbot dynamically branched into various pathways, evaluating the potential qualification of the user.
3. Users exhibiting signs of qualification were prompted to provide their contact information to progress further along the qualification journey.
4. The user's information was automatically integrated into the Customer Relationship Management (CRM) system and managed according to the user's specific requests.
5. In alignment with agent availability, qualified users had the option to request a direct interaction with a live agent or schedule an appointment for a callback.
6. The chatbot's performance was vigilantly monitored over several weeks, and adjustments were made to the conversation flows based on user interactions. Additionally, A/B testing was conducted on different conversation paths to refine and optimize the overall conversion rate.

## IMPACT ON BUSINESS

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The business impact far exceeded expectations, demonstrating the following notable outcomes:

- **Operational Cost Efficiency:** The implementation of chatbots led to substantial cost savings by automating chat functions, reducing the reliance on human chat agents.
- **Decreased Abandoned Chats:** There was a remarkable 60% decrease in instances of abandoned chats, wherein clients left without finding their desired service. This, in turn, resulted in a noteworthy reduction in website bounce rates and a simultaneous increase in the submission of qualified leads.
- **Enhanced Chat Lead Conversions:** A 35% surge in chat lead conversions was achieved through the deployment of a more targeted chat script. Responses were meticulously crafted to instill client confidence, thereby boosting conversion rates.
- **Enhanced Customer and Sales Representative Experience:** The implementation of chatbots translated into improved convenience for both customers and sales representatives. This was achieved through more effective call scheduling and seamless transitions to live sales agents based on their availability.
- **Heightened Customer Satisfaction:** Customer satisfaction levels surged due to the chatbot's swift responses and its ability to identify issues at their root through an intelligent knowledge base, providing a superior customer experience.