

THE AI CHATBOT CHECKLIST

10 must-have capabilities of a sales and marketing AI chatbot

AI chatbots aren't created equal. If you're considering a chatbot to drive more pipeline from your website, ask yourself: does my AI chatbot check these 10 boxes?

Visitor Identification

Identify individual website visitors and build a holistic profile.

Visitor Segmentation

Segment website traffic to weed out "tire kickers" and prioritize VIPs.

Website Activity Monitoring

Observe visitor browsing behavior to understand interest and intent.

Proactive Engagement

Know when and how to engage a visitor with the right message.

Chatbot Q&A Training

Ingest resources about your company and products to deliver a relevant output.

Chatbot Goals

Work toward pipeline goals so it can tailor its behavior and hit targets.

Complex Routing

Route visitors to the right sales rep based on unique business criteria.

Meeting Scheduling

Book meetings with qualified buyers around the clock in just a few clicks.

Sales Handoff

Seamlessly transfer qualified visitors to a sales rep for a live conversation.

Chatbot Workflows

Track activities so sales and marketing teams know their next best action.