THE DEMAND GENERATION MARKETER’S GUIDE TO DRIFT

How Conversational Marketing Will Drive More Leads, Book Meetings Faster and Generate More Revenue For Your Company In 2019
This guide was written to help demand generation marketers understand how Drift and conversational marketing can help them drive more leads, book more meetings for sales teams and generate more revenue. This guide is based on conversational marketing best practices both from our own experience growing Drift and lessons we’ve learned from our customers.

**WHAT DOES DRIFT DO?**

Drift is the world’s leading conversational marketing platform. It helps businesses talk to their ideal customers when the customer wants to engage, instead of making them wait for later.

**WHY DRIFT?**

Today’s buyer has changed. They no longer have to wait for answers, or wait to hear back from your business. Information is everywhere across the internet. And it’s very likely if you can’t provide a fast enough answer to your buyer, your competition will.

Drift’s conversational marketing and selling platform includes everything you’ll need to talk to more buyers, now.

Starting with real-time messaging, Drift allows you to connect with buyers as they browse your site, in real-time. And unlike live chat, Drift has advanced targeting so you can focus on people visiting your website that your sales team wants to talk with.

On top of real-time messaging, Drift works seamlessly with email so you can drive more conversations even when your buyer isn’t on your website. With Drift Sequences & Chrome Extension, you can make sure every email your sales team sends, leads back to real-time messaging on your website, where a buyer can continue the same conversation with your sales team.

And if you’re running account-based marketing campaigns (or have named accounts your sales team wants for demand generation marketers, Drift will:

- Help you generate more qualified leads through chatbots and conversations on your website
- Help you book meetings faster, for your sales team using chatbots
- Help your sales team have more sales conversations with the best leads on your site

But it’s also important to distinguish what **Drift is not**. For instance:

- Drift is **not** just live chat.
- Drift is **not** for support teams.
- Drift **does not** require you know how to code or program to build a chatbot.
to work with) Drift can help you roll out the red carpet for those VIPs with Drift ABM. Instead of just driving your named accounts to forms on your site, with Drift you can automatically welcome them with personalized messages from their account owner.

**Drift is a powerful conversational platform, but it’s not an all-in-one platform.** While Drift helps you have more conversations with your buyers, we’ve built integrations with the most popular marketing automation, CRM and other products your team is using, like Slack and Google Analytics. So you’ll be able to seamlessly fit Drift into your stack.

## WHO USES DRIFT?

**Drift was built for marketing and sales professionals, not support teams.**

Typically, demand generation marketers are interested in trying Drift to generate more qualified leads, speed up their sales cycle and make buying a lot faster for their customers.

That’s why demand generation marketers typically are the first adopters of Drift in their company. Many will start by building Drift Playbooks™ and test chatbots on their website before they get their sales team involved. This is what we recommend to many of our customers.

In fact, before connecting integrations, setting up Drift accounts for your sales team, or even installing the chat widget on your website – we suggest you try a **Conversational Landing Page**, which is a standalone landing page with a bot conversation and its own URL. You can test an email campaign, webinar, event signup or PPC campaigns and direct traffic to this landing page.

We highly suggest you look at your upcoming campaigns calendar and consider where you can try a Conversational Landing Page.

We use Conversational Landing Pages for our monthly product launches and that’s when we see huge spikes in conversations on drift.com. Product launches are a great use-case for Conversational Landing Pages because people on your website checking out something new are going to have questions and express high intent in your product. Capturing that intent by booking meetings and generating **CQLs** is conversational marketing best practice.

**What is a CQL?** We define a CQL as a person who you’ve had a conversation with (via Drift) and they have made it clear to you that:

1. They are interested in buying your product or service, and
2. Their goals can be accomplished with your product

This qualification can be applied manually or automatically by Driftbot!
While demand generation marketers tend to be the first to adopt Drift, after you’ve tested conversational marketing with a landing page or perhaps a bot on your website, you’ll start receiving conversations from prospects and soon your sales team will be asking you to give them access to Drift.

HOW AND WHEN TO GET YOUR SALES TEAM ON DRIFT

Changing your sales team’s process isn’t easy. We get that. But adding in a new communication channel – one where your buyers actually want to talk – is going to help your sales team close deals. So let’s talk about when it’s a good time to get your sales team access to Drift and how to do it.

Step 1 Conversational Landing Page

As discussed earlier, we recommend you, the demand gen marketer, first start engaging your website visitors with chatbots that automate conversations. The easiest way to get started, that does not require code, is a Conversational Landing Page.

If you’re not ready to connect your marketing automation system, you can export the leads you generate from that landing page as a CSV and upload into your marketing automation system.

This experiment will give you a sense of the volume of conversations. It’s also a great way to test different bot questions and find out which are the best conversation starters.
Step 2 Offer chat

The second step is enabling chat for a select audience and providing chat as an option to that audience and you – the demand gen marketer – handle conversations.

How does one person manage all conversations? With Drift you can set up criteria for when your chat widget displays. Using these controls, only your desired audience(s) will see the chat widget – and be able to start conversations with you.

Again, if you start with a small segment of people you’ll get a sense of the volume of conversations + the quality of the leads that start conversations without being overwhelmed (or overwhelming your sales team).

Similar to lead generation campaigns you’ve run, you want to start small and test the waters before you go all in. The important part is finding the inflection point, where you or your marketing team are having enough conversations with people your sales team should be speaking with, that you actually need to get your sales team into Drift.

Step 3 Onboard a few sales reps

We suggest you start by training 2-3 sales reps in Drift. Those reps could be in sales development, account executives or some other small group of your sales team. The important part is that it’s a smaller group so you can work closely with in order to make them successful using Drift.

Upon successful adoption, you’ll be ready to add in more sales reps. Remember, any lead might end up on your website looking for answers. So any sales rep that should be talking to qualified leads needs access to Drift.

So to help your sales reps get the most out of Drift, eventually you’ll want to give them all access.

But before you do, you must write a chat SLA.
Step 4 Write a chat SLA

Like any lead you deliver to your sales team, you need an SLA so both teams are committed to properly working leads.

For you to be effective at conversational marketing, your sales team must engage in conversations as quickly as they come in. Think about it. You want to engage with your leads when you have their attention – and there isn’t a better time than when they are on your website looking at your product.

Drift has desktop, mobile, and email notifications so the correct sales rep will get notified when a conversation is started with them. We’ve also built sophisticated conversation routing to make engaging with people on your website easy.

But we recommend before you roll out Drift to the whole sales team, you sit down and add chat leads to your sales and marketing SLA. Consider:

- You want your sales team, or some portion of your team, ready to reply to conversations during business hours within minutes of a conversation being started. Based on our research it’s important to provide a response within 5 minutes.

- Clearly outline what hours your sales team will be available to respond to incoming conversations. You can set up what hours your team will be available and Teams in Drift once you’ve settled on an SLA.

- One strategy we recommend is having “chat duty.” Meaning each sales rep is assigned a certain amount of hours during the week to handle incoming conversations before they are assigned to a sales rep. This has worked for the Drift sales team as we’ve scaled from a few reps to over seventy.
HOW TO IMPLEMENT DRIFT INTO YOUR EXISTING TECH STACK

Every marketing team has a different tech stack. At Drift, we use several different technologies to help us with demand generation. Most likely there are two core marketing technologies that are at the center of your stack. Those two technologies are your CRM and your marketing automation system.

The good news is, Drift integrates with the most popular CRM and marketing automation systems. Most notably, Drift natively integrates with: Salesforce, Marketo & HubSpot. However, we have dozens of other native integrations with marketing technologies like Slack, Zapier, Google Analytics and Clearbit.

Salesforce

Drift’s integration with Salesforce is the most extensive for any messaging platform. Create leads, map attributes, connect campaigns, pass transcripts and a whole lot more when you connect Drift to your CRM. You can:

- Create and update Leads or Contacts in Salesforce that originate in Drift.
- Send Chat activity from Drift to Salesforce in a contact’s Activity History
- Send Meetings Booked in Drift to Salesforce in a contact’s activity history
- Measure influenced revenue in Drift from opportunities and closed won deals in Salesforce
- Connect your account-routing to Drift so that Drift can automatically assign conversations to the correct sales rep

Drift + Salesforce is one of our most popular integrations. We are always working on improvements so it’s likely we’ve already made updates since the time of publishing this guide.
Marketo

Connect Marketo to automatically pass new contacts from Drift conversations into your marketing automation system as well as post lead activity. You can also map attributes from conversations into Marketo. You can:

- Create leads in Marketo that originate from Drift.
- Identify leads in Drift conversations already created in Marketo using the Marketo Munchkin Cookie.
- Trigger nurture campaigns based on how a lead interacts with Drift chat.

HubSpot

Create contacts in HubSpot from Drift conversations, map Drift attributes into HubSpot and see conversations in your contact’s timeline. You can:

- Create contacts in HubSpot that originate from Drift
- Identify leads in Drift conversations already created in HubSpot using the HubSpot cookie.
- Log conversations in a contact’s timeline within HubSpot
- Trigger nurture campaigns based on how a lead interacts with Drift chat

And if you’re using another CRM or marketing automation system that we haven’t already built an integration, don’t worry. We have a robust integration with Zapier so you can connect Drift to almost any other system imaginable. We also have an open platform with API endpoints so you can build your own custom integration.
HOW TO MEASURE THE IMPACT OF DRIFT AFTER YOUR FIRST MONTH

While it’s tempting to measure Drift by comparing the conversion rates between a landing page with a form against a chatbot, that’s not what we recommend doing to measure success.

There are two things you should do to measure the impact of conversational marketing on your funnel.

First, if you’re using Salesforce, connect your opportunity tracking from Salesforce into Drift so you can see influenced revenue.

With revenue reporting, you’ll be able to see exactly how many opportunities, the potential revenue of those opportunities, as well as the amount of closed won revenue was influenced by Drift.

“Influenced by Drift” means a contact on the account had a conversation via Drift prior to purchasing or becoming an opportunity.

The second thing you should do to measure success is check the lead to opportunity conversion rate for leads that originate in Drift and the number of days it takes for those leads to become opportunities.

Here’s how to do it.

If you had 100 leads come from Drift, how many became opportunities? If it’s 20, compare that 20% rate against your overall lead to opportunity conversion rate for non-Drift leads.

At Drift, leads that come from conversations on our website are 2.5x more likely to become opportunities than our other sources like webinars, events and freemium product sign ups.
People viewing your pricing page indicates high buying intent, right? But most pricing pages rely on buttons or forms for visitors to get in touch with you to ask a question and get an answer later. Why make your highest intent leads wait to get answers when you can give them an answer now?

With one Playbook, you can set up a chatbot that asks people on your pricing page what they are looking for and direct them to helpful content. Can you imagine your best sales rep, working tirelessly 24/7 on your website being extremely helpful and providing quick answers to potential customers? That’s what this Playbook will do.

If you don’t have a pricing page, we recommend you run a similar Playbook on a product page.

THE FIRST PLAYBOOKS YOU SHOULD BUILD

Once you’ve set up your Drift account, installed the code on your website and your sales team is on Drift, you’ll want to create Playbooks for your website. Playbooks are automated workflows in Drift you set up to achieve a specific goal. For instance, this is where you set up chatbots to qualify and book meetings with your sales team on your website.

When you are first getting started with Drift, here’s two Playbooks we highly suggest you start with in your first month.
Playbook 2 Replace Your Request A Demo Landing Page With A Bot

This is one of the easiest ways to get more demos for your sales team, and it will only take you about 5 minutes to set up.

There’s two steps to setting this up. If you haven’t helped your sales team connect their calendars to Drift yet, you’ll need to do this first.

Second, you’ll need to build the Playbook with a chatbot that’ll pop up on your website when someone clicks a “Request a Demo” button.

You can use the same Playbook in multiple places, you’ll just need to take the #DriftLink from that Playbook and replace that “Request a Demo” button URL with this new link.

For instance, if your request a demo landing page is currently www.applinks.com/demo you’ll create a Playbook and the #DriftLink would look like this: www.applinks.com/#demo.

Of course, when you build this playbook you’ll set up the bot to ask the qualifying questions that are most important to your business. We highly suggest setting it up to ask two to three questions. Upon being marked qualified, the bot will automatically present the correct sales rep’s calendar to the person on your website so the meeting gets booked right away.

Once you have those two things set up, your sales team will start getting their calendars filled up with meetings.

One of Drift’s customers, SalesRabbit, tried this Playbook. They replaced their landing page with a chatbot and increased their demos by 40%.

If you’re seeing good results with those two playbooks, or want to try something more advanced, we’d recommend you setup Drift ABM (available in Company and Enterprise plans).

Drift ABM lets you welcome your VIPs to your website in style. It’s like rolling out the red carpet for them.

To set up Drift ABM, you’ll import your target accounts from Salesforce, or a CSV. You’ll craft a welcome message and use Clearbit’s enriched data to provide custom welcome messaging to your dream buyers.

From then on, when your target accounts visit your website, they’ll get a personalized welcome message from their account owner and the option of skipping forms and having a conversation or meeting instead.
MORE THAN JUST CONVERTING WEBSITE TRAFFIC, CONVERSATIONS FIT ACROSS YOUR FUNNEL

Since your buyer has changed, so must your marketing. And while most marketing technology is built around a linear buying journey, we know in reality that’s no longer true.

And that’s why we’re building Drift around conversations. Throughout the buyer’s journey, conversations are the best way to connect with buyer’s that are ready to buy now.

Conversational marketing is much more than just converting website visitors into contacts. It’s about providing real-time 1:1 conversations to your buyers at every step of their journey.

For instance, you can build Playbooks to welcome known contacts back to your website. If those known contacts had a meeting with a member of your sales team, why not have that sales rep be the friendly face welcoming them back and creating a direct line between your buyer and the seller?

That’s a personalized experience that puts the buyer first while still helping you achieve your goals. It’s a win–win. And that’s what conversational marketing is all about.

The Customer Journey: Perception vs Reality

The perceived buyer’s journey:

BUYER’S NEED  CUSTOMER

In reality, the buyer’s journey looks more like this:

BUYER’S NEED  CUSTOMER

So what’s next? Visit Drift.com right now to book a meeting with our team of conversational marketing experts and learn how you can build faster pipeline with Drift.
RESOURCES

THE TOP 3 QUESTIONS MARKETING LEADERS ASK ABOUT DRIFT

Answering The Top 3 Questions CMOs & VPs Ask About Drift

Every Marketing Leader Asks These Questions About Conversational Marketing

Conversational Marketing University

SalesRabbit Adopts Conversational Marketing and Books 40% More Meetings For Sales Team