

# Say Goodbye to Expensive Third-Party Chat Tools with **50%** cost reduction and Hello to Marketo Engage's Free **Native Dynamic Chat**





## At a Glance

Chatbots have become increasingly popular, thanks to the new age users. Nothing can beat the humanlike responses that are available all 24/7. All progressive enterprises are integrating chatbots into their websites to ensure a seamless customer experience.

One of our clients was leveraging the 3rd party chat tools. While the tools provided satisfactory results, they were creating a severe financial burden on our client.

With our help, our client was able to shift seamlessly from a cash-draining method to a better financial and technical solution. The results spoke for themselves!



Implemented over  
350+ dialogue  
components



Up to **\$30k**  
Saved Annually



Chat messages  
with **65%** open rate  
& response rate



Website speed  
score increased  
by **36%**

## Our Client Wanted to Give Their Website's Visitors a VIP Treatment, Instead They Got Issues

Our client was looking to give their website visitors the VIP treatment by offering

- Tailored 1:1 personalized conversations without breaking the bank.
- Useful content collaterals, like case studies and PDFs, directly within the chatbot.

And, to make sure all leads were appropriately directed to the Sales team, they needed an effective Lead Routing system.



## Third Party Chat Tools Can Only Get You So Far...

Our client's regular lead generation and marketing campaigns required leveraging valuable customer data. The client's enterprise required a more customized solution for the customers.

While our client was utilizing third party chat tools, they were causing several problems:

- The third party chat tools **required development resources** more than often for **making them more adaptable**. In the long run, it was causing several **cash drains**.
- There was **no way to collect valuable customer data** such as analytics and user behavior. A more customized solution meant investing heavy amounts of financial resources from time to time.
- Due to dependency on resources outside the organization, our client had **limited control** over maintenance and support. Furthermore, they were subjected to **data privacy concerns, integration issues and compliance complications**.
- Such complications and issues often caused a **lag in website's response rate**, which resulted in **reduced customer satisfaction rates**.

---

## There Was a Dire Need to Shift to a Better Alternative, But...

While our client recognized the urgency to shift towards a better chat bot tool, the biggest issue was **migration costs**, as well as **compliance**. Not to mention, the **workflow was going to be interrupted**, leading to many halted operations, missed opportunities and significant reduction in customer satisfaction.





# Our Practical Solution to Not-Very-Practical Third Party Chat Tool

We introduced our client to the practical solution that was **Marketo Engage's Free Native Dynamic Chat Tool**. However, a mere introduction wasn't enough. We had to adopt a multi-approach solution to achieve everything that the client wanted.

## 1. Dynamic Chat - Marketo Sync

To set up a seamless integration, we synced Dynamic Chat with Marketo by initializing the sync for the Marketo instance and setting up a dynamic chat account. We also performed custom attribute mapping to ensure that the unique attributes of the two systems were aligned properly.

## 2. Chat Configuration

Customization was key to create a chatbot experience that felt like a personal concierge. We customized the agent settings of Dynamic Chat in Marketo, adding a custom avatar that matched our client's company branding. This helped create a cohesive and professional look for website visitors. Additionally, we implemented privacy and content security policies to ensure compliance with all relevant regulations.





### **3. Chatbot Behavior**

Our team defined various scenarios outlining how the chatbot should interact with visitors, based on their unique needs. This helped create a personalized experience that felt like a one-on-one conversation.

### **4. Dialogue Set Up**

Creating chat conversation dialogues was another important step in the integration process. Our team specified dialogue goals, and upon meeting these goals, we set up triggers for content sharing and email communication. This helped create a seamless customer journey that delivered personalized content collaterals such as case studies and PDFs within the chatbot.

### **5. Lead Routing Workflows**

Leads were appropriately directed to the Sales team with the implementation of an effective Lead Routing system. We used lead routing logic to ensure even distribution among sales teams and streamlined appointment booking. This helped create a smooth handoff to Sales, providing website visitors with a VIP treatment.

### **6. Reporting & Analytics**

To monitor key metrics and adjust our strategy as needed, we set up analytics using an interactive dashboard. The dashboard provided an overview of booked meetings and upcoming appointments, as well as conversation volume, engagement rates, and completion rates.

---

## **The Results Spoke For Themselves**

Like the approach itself, the outcomes promised multi-level benefits.

---



- Saved **100%** on the chatbot subscription and up to **\$30k annually** from the total marketing automation spend.
- Improved customer experience by providing **tailored 1:1 personalized conversations** and **relevant content collaterals** within the chatbot.
- **Streamlined the lead routing process** and appointment booking, resulting in more efficient handoff to the Sales team.
- **Integrated the Dynamic Chat tool** into a holistic **cross-channel marketing strategy** in Marketo Engage.
- **Improved website interface** with customized agent settings and **branding alignment**.
- **Monitored key metrics through reporting and analytics**, including conversation volume, engagement rates, completion rates, booked meetings, and upcoming appointments. These key metrics allowed our client to make several **key decisions** which resulted in **3x better leads**.
- Contributed to a comprehensive cross-channel **marketing approach**, resulting in increased revenue impact and faster processes.

---

## Are You Still Using Third Party Chat Tools for Something Other Than MVPs?

Third party chat tools are perfect for MVPs and limited usage. However, if your business is using these tools for everyday operations, you are potentially inviting the following troubles into your workflow:





- Website Integration roadblocks
- Breaking the Bank
- Limited Customization
- Technical issues
- Compromised Conversions on the Website

We have helped many businesses switch from third party chat tools to **Marketo Engage's Free Native Dynamic Chat Tool**. After our help, and successful integration of the dynamic chat tool, they were able to upscale their ROI, save tremendous financial resources (our current client saved 30,000\$ annually) and significantly increased their lead-to-customer conversions along with customer satisfaction rates.

## About Xgrid

Xgrid is a Cloud Automation and Development Company that helps Fortune 500 and Unicorn companies. We help companies stay ahead of the curve, and realize their cloud computing goals while providing them with the tools and expertise they need to succeed in today's fast-paced digital world.

[Schedule an Assessment](#)