

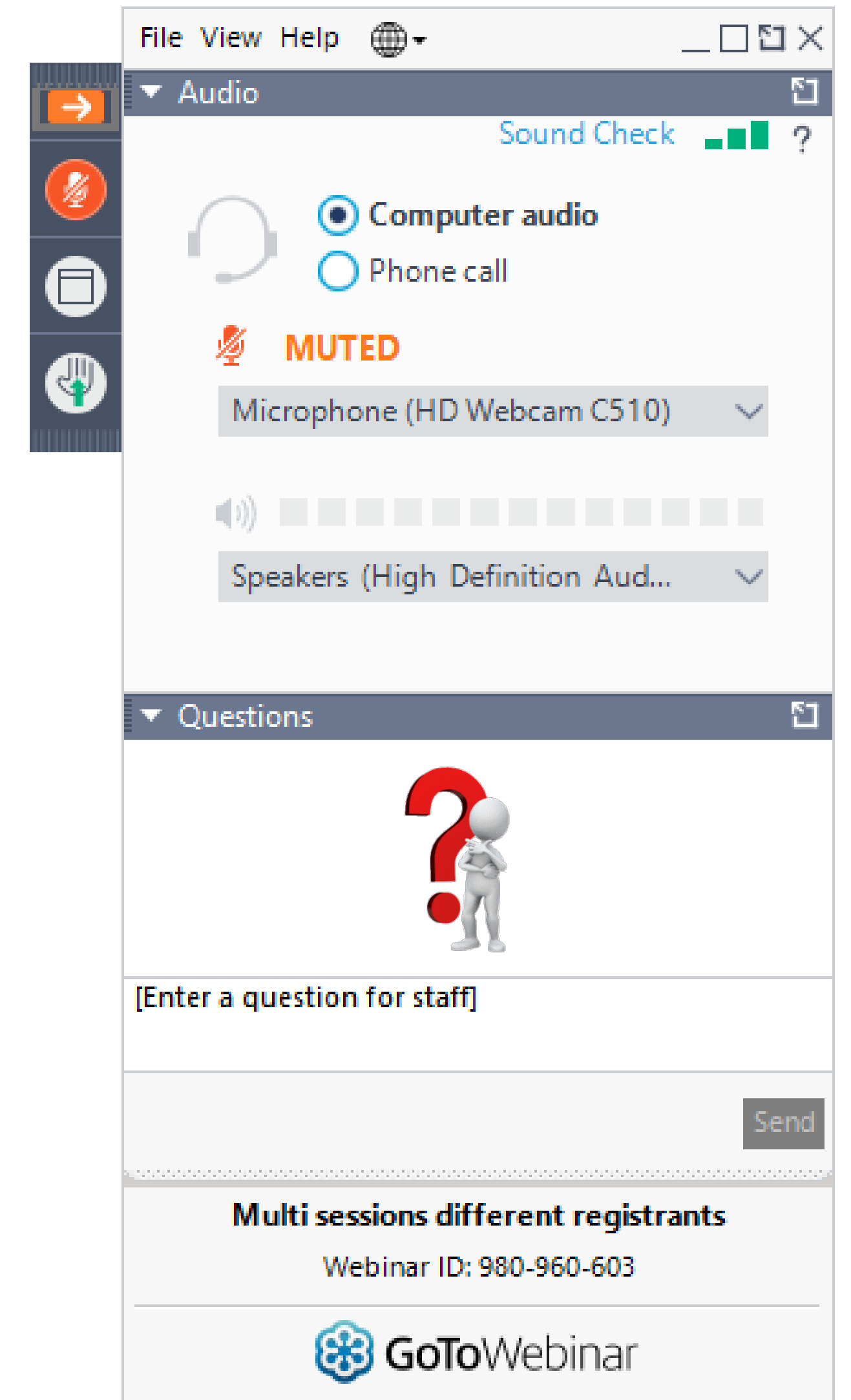


Ahead of the Curve Webinar Series

How to Reimagine Your Customer
Conversations Using the Latest
Technology

A Few House Keeping Items:

- All lines are muted
- Submit your questions via dashboard
- Q&A session at the end
- Webinar is being recorded
- Webinar recording will be sent out
- If you experience a drop in audio, try calling in or switching to the phone audio option and back to your computer again





WSI AT A GLANCE

For 25 years, WSI has been providing digital marketing services and comprehensive marketing strategies to businesses of all sizes and across various industries. We are the largest network of digital marketing agencies around the world.

We are a full-service digital marketing agency that helps elevate your online brand, generate more leads and sales, and improve your overall marketing ROI.

TODAY'S PRESENTER



ERIC COOK

WSI Digital Marketing Consultant, Speaker & Author

Eric Cook is a former 15-year community bank executive, now serving the financial services industry as a digital strategist and award-winning web designer with WSI since 2007. Eric has authored a chapter in each of WSI's three *Digital Minds* book. He authored the Conversational Marketing chapter in WSI's recently published book, *Digital Minds: A Strategic Approach to Connecting and Engaging with Your Customers Online*.

On the Agenda

1. Conversational Marketing – The Landscape Today

2. Types of Chatbots & How to Get Started

3. Benefits of Chatbots

4. Avoid the “Valley”

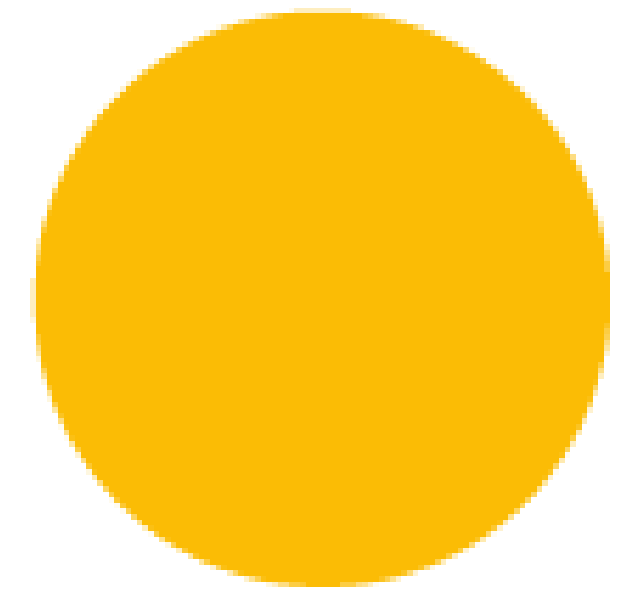
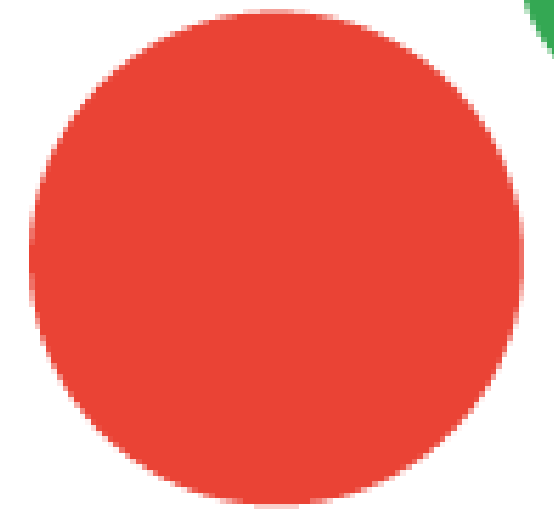
5. Q&A


A photograph of two men sitting at a small outdoor table, engaged in conversation. The man on the left is older, with grey hair, wearing a grey t-shirt and dark shorts, sitting on a black stool. The man on the right is younger, with dark skin and dreadlocks, wearing a white t-shirt and dark pants, also sitting on a black stool. They are both looking at each other. On the table between them is a dark glass bottle and a small glass. The background shows a modern building with a textured wall and a large overhang. A trash bin is visible on the left, and a car is parked on the street to the right. The entire image has a blue tint.

Create Conversations



Conversations on Multiple Platforms



A close-up photograph of a person's hand holding a silver smartphone. The phone is held vertically, and the camera lens is visible. To the right of the phone is a white disposable coffee cup with a black lid. The lid has the word 'MAKI' and some numbers printed on it. The background is blurred, showing warm, bokeh-like light spots. A semi-transparent dark blue box is overlaid on the left side of the image, containing white text.

90% of consumers want to use
messaging for communicating
with businesses, and a
majority prefer it over email.

~ Twilio



**Facebook
Influence**

46.1 Billion

Messages Every Minute!



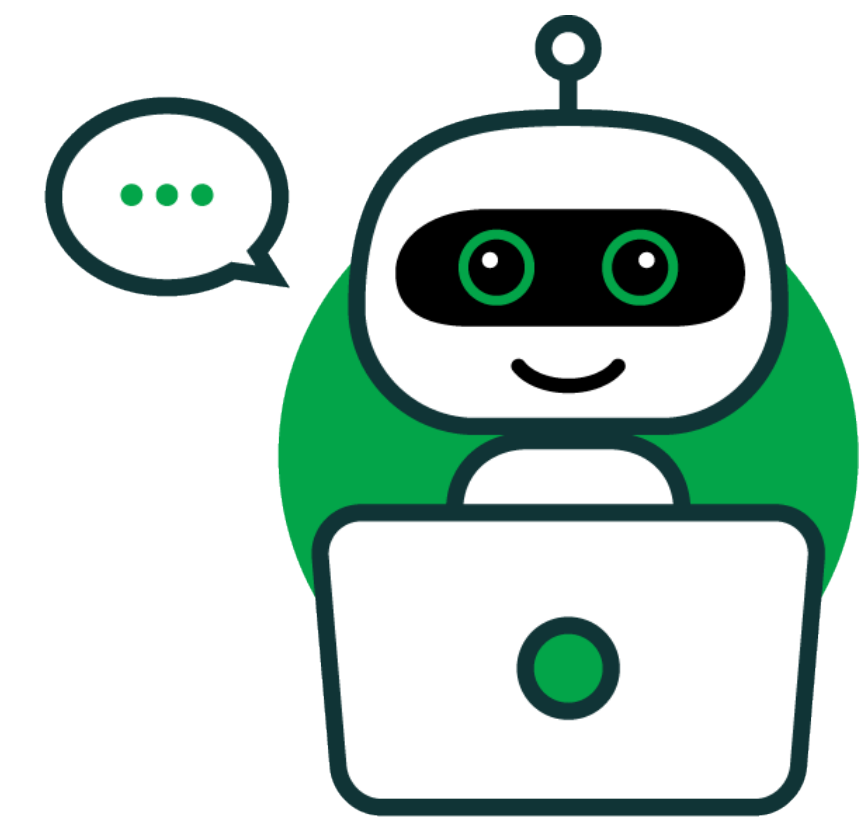
MINE YOUR SEARCH ACTIVITY

The screenshot shows the Heartland Bank website with a search bar containing the word "mortgage". Below the search bar, it says "Found 1190 results (0.25 seconds)". The first search result is "Home Mortgage Loan Rates | Heartland Bank" with the URL "https://www.heartland.bank/LENDING/Home-Mortgage-Loan-Rates".

An overlay window titled "Behavior" is shown on the right side of the page. It contains a list of search terms and their corresponding search activity data. A red arrow points from the search bar to the overlay, and another red arrow points from the "Site Search" menu item to the overlay.

Search Term	Total Unique Searches	% Total Unique Searches
1. ppp	12	1.42%
2. routing number	12	1.42%
3. cd rates	10	1.18%
4. sba	9	1.07%
5. paycheck protection	8	0.95%
6. quickbooks	8	0.95%
7. mortgage rates	6	0.71%
8. careers	5	0.59%
9. Gahanna	5	0.59%
10. heloc	5	0.59%

[view full report](#)



Three Types of Bots

1. Informational
 - Simple, general information (such as FAQs), push notifications
2. Transactional
 - Allow interaction with the business, likely require authentication for payment
3. Advisory
 - Most sophisticated, self-learning based on past interactions

WEBSITE CHAT IN THE WILD

The image displays two overlapping screenshots of the Heartland Bank website, illustrating the integration of a live chat feature.

Top Screenshot (Login Page):

- Header:** Heartland Bank logo, contact number (800) 697-0049, and navigation links: Contact Us, Locations, Search, PERSONAL, BUSINESS, LENDING, LEARNING, FINANCIAL PLANNING, OUR BANK.
- Alert:** An orange banner at the top right states: "For information about our banking services, in-branch availability, and a personal message from our Chairman and CEO, please visit our [COVID-19 Resource Center](#). We are posting updates and new information here when it becomes available."
- Login Form:** A blue box on the left contains the "LOG IN TO:" section with a dropdown menu set to "Online Banking", fields for "Login ID" and "Password", a "Show Password" checkbox, and a "Login" button. Below this is an "APPLY NOW:" section with a "Select Product" dropdown.
- Chat Window:** A "Chat with us" window is open on the right side of the login form. It contains the text "How can we help you today?" and a yellow message bubble that says "I'd like to know more about your PPP and SBA programs." Below the bubble are "Cancel" and "Submit" buttons.

Bottom Screenshot (Account Dashboard):

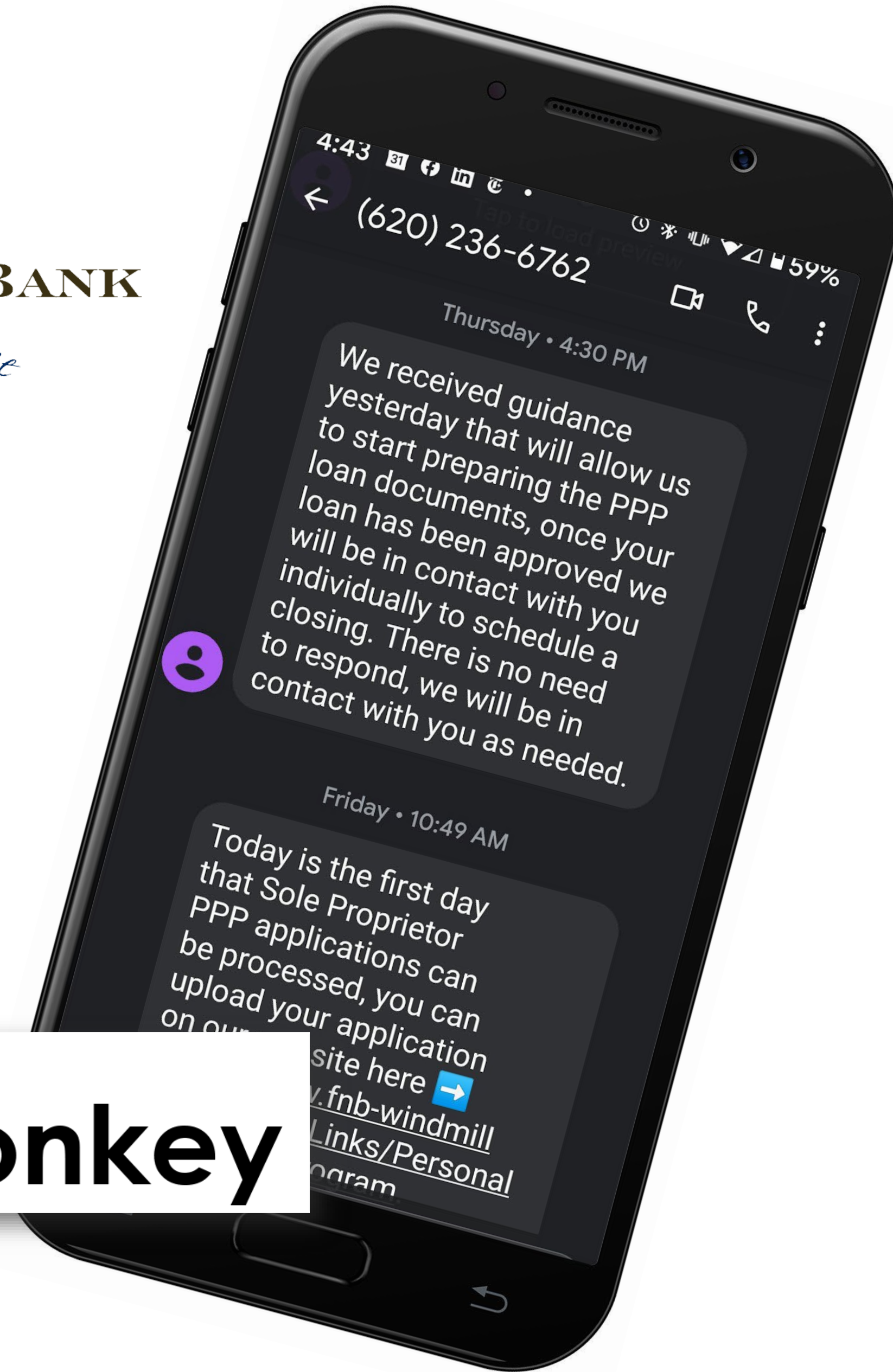
- Header:** Similar to the top screenshot, but with a "Welcome back, Q2" message and "Last login 09/03/2019 at 2:...".
- Navigation:** A sidebar menu on the left includes links for Home, Messages, Transactions, Funds Transfer, Deposit Check, Activity Center, Statements, Check Reorder, Branches, News, Services, Help, Settings, and Log Off.
- Accounts:** A list of accounts is displayed, including Credit Card 0-8901, Certificate of Deposit 0-3456, Mortgage 0-4567, Regular Checking 0-5678, and Savings 0-2345. Each account shows its available and current balance.
- Chat Window:** The "Chat with us" window is open on the right side of the account dashboard, showing the same yellow message bubble and "Submit" button.

Text Overlay: At the bottom of the bottom screenshot, the text "Convenient. Easy to use. More s" is visible.



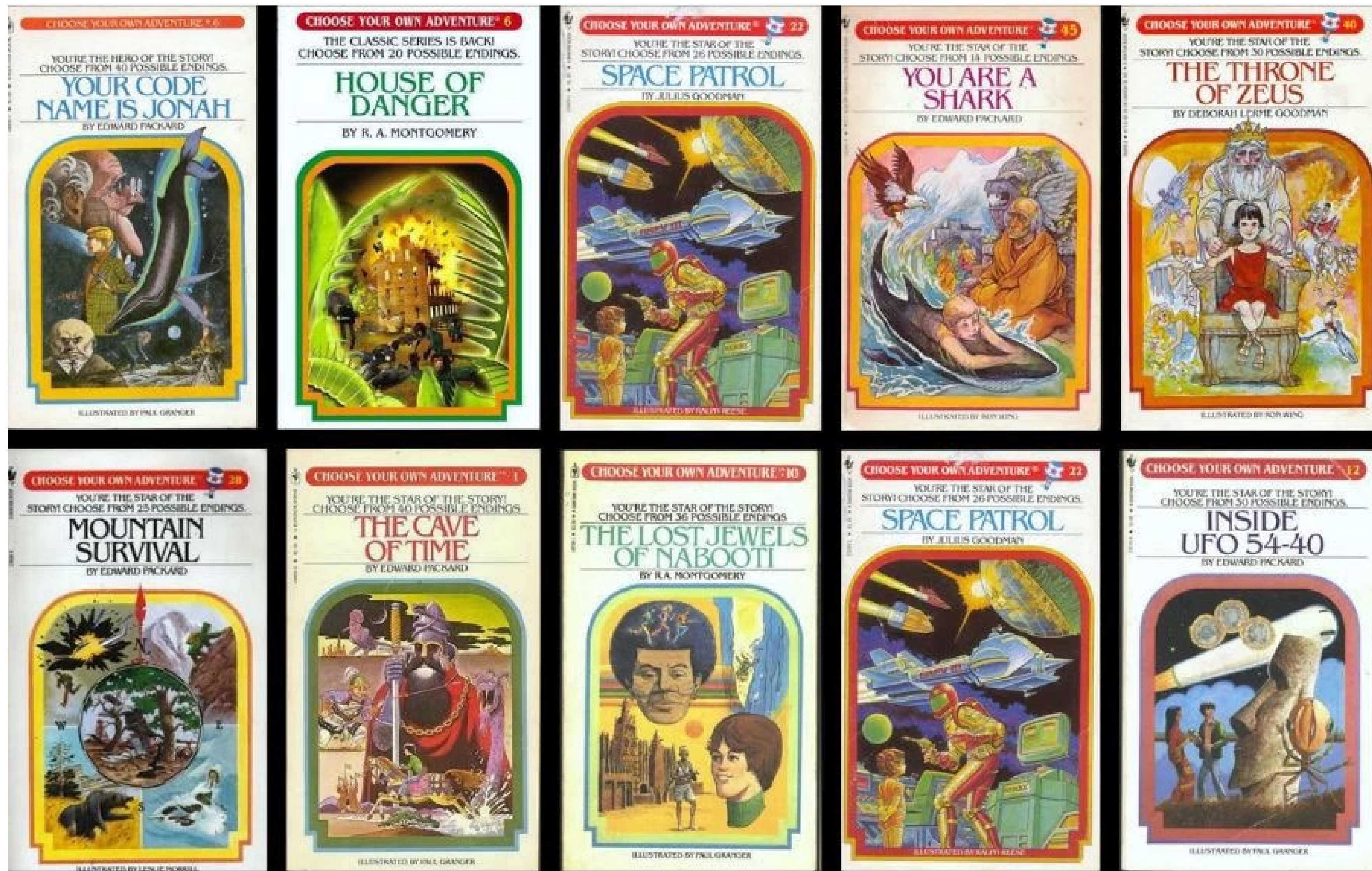
FIRST NATIONAL BANK

Making Dreams Come True
Member FDIC

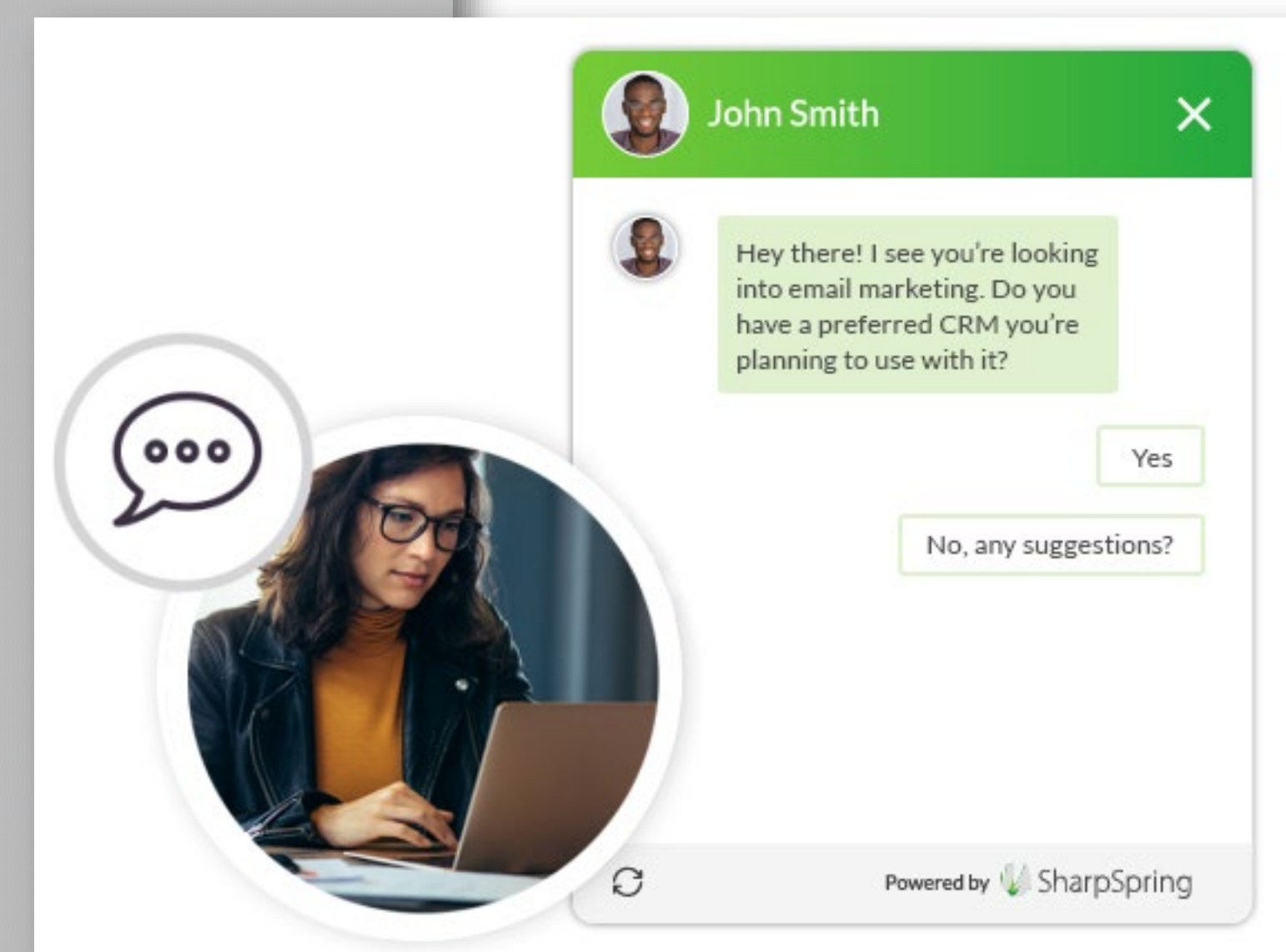
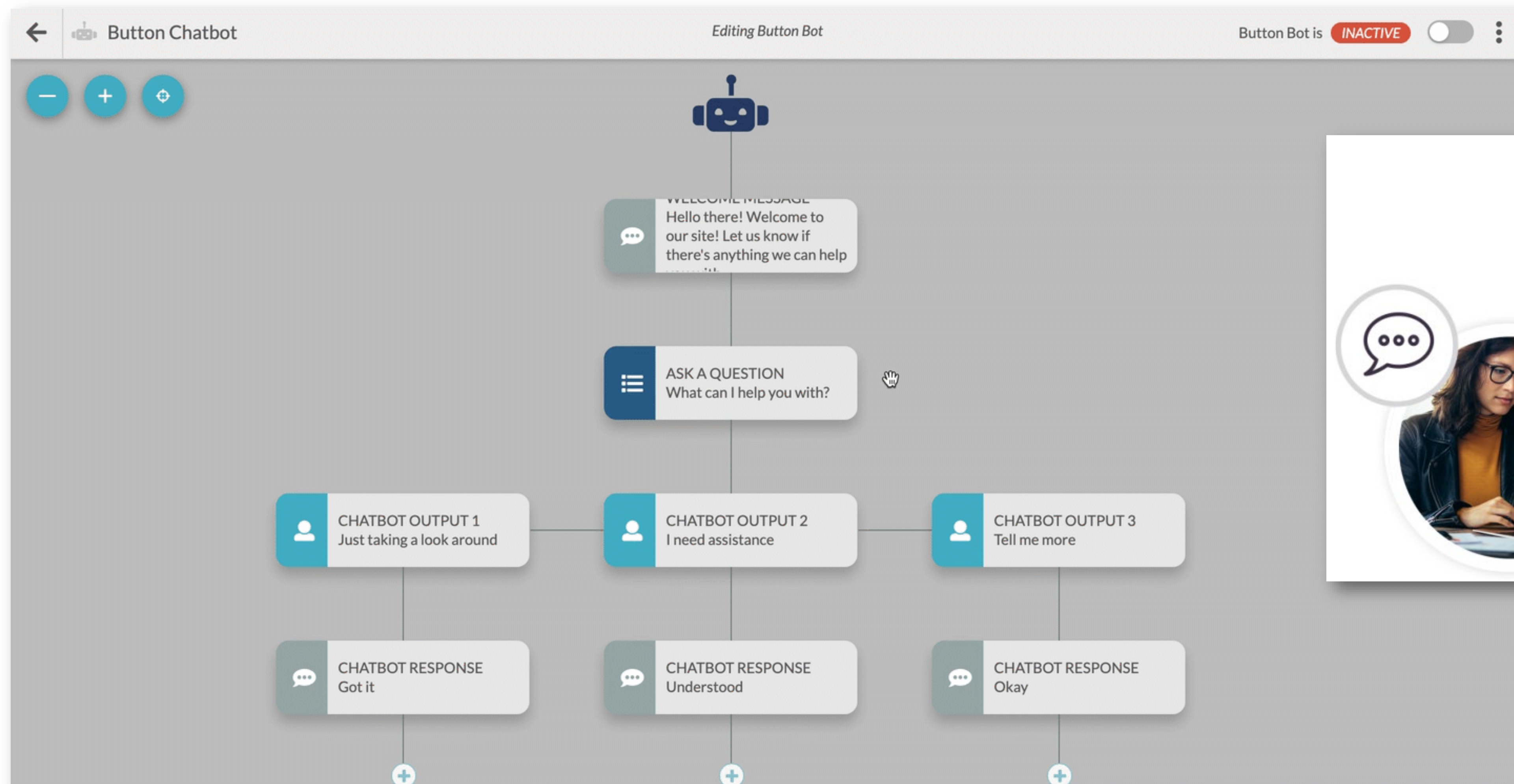


MobileMonkey

Choose Your Own “Chat Adventure”



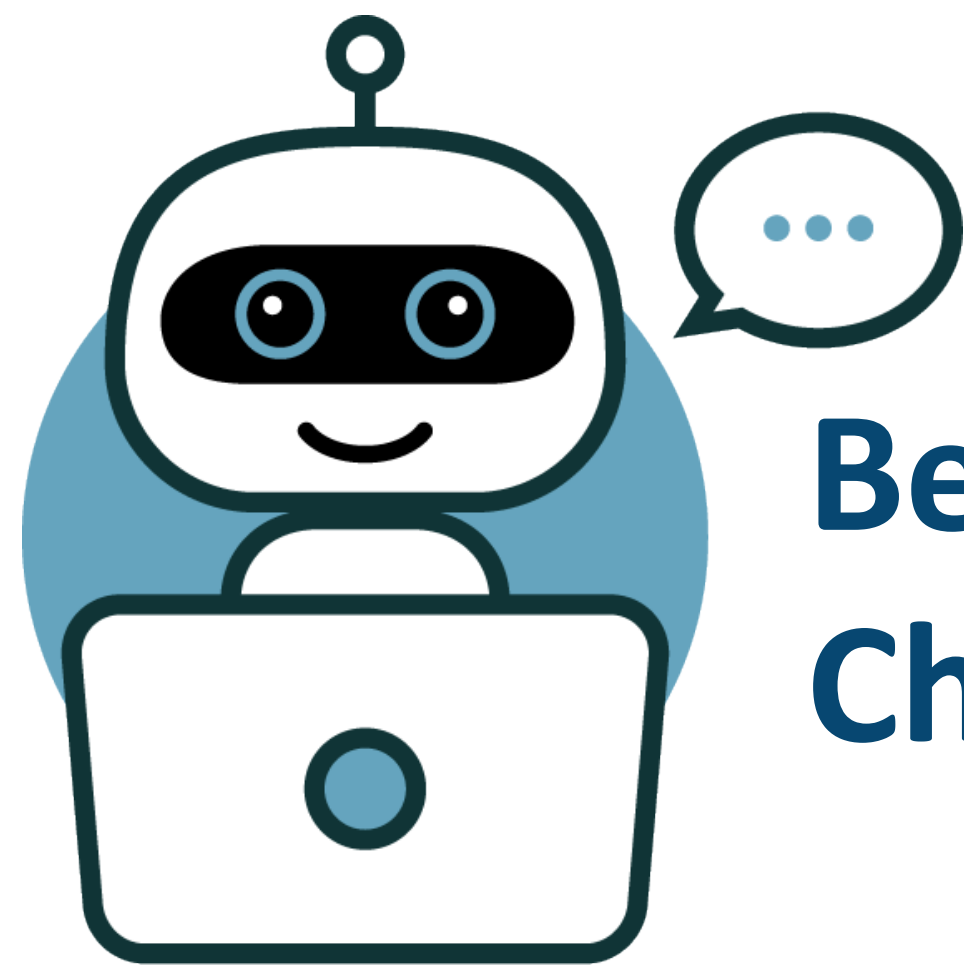
MAP YOUR DESIRED CONVERSATION FLOW



*“There is a big difference between **personalized** and **personable**. Machines are far better at personalization (ability to look across data sources, instantaneous processing, remembering preferences, etc.), while humans historically excel at being personable.”*

~Jason Henrichs, FinTech Forge



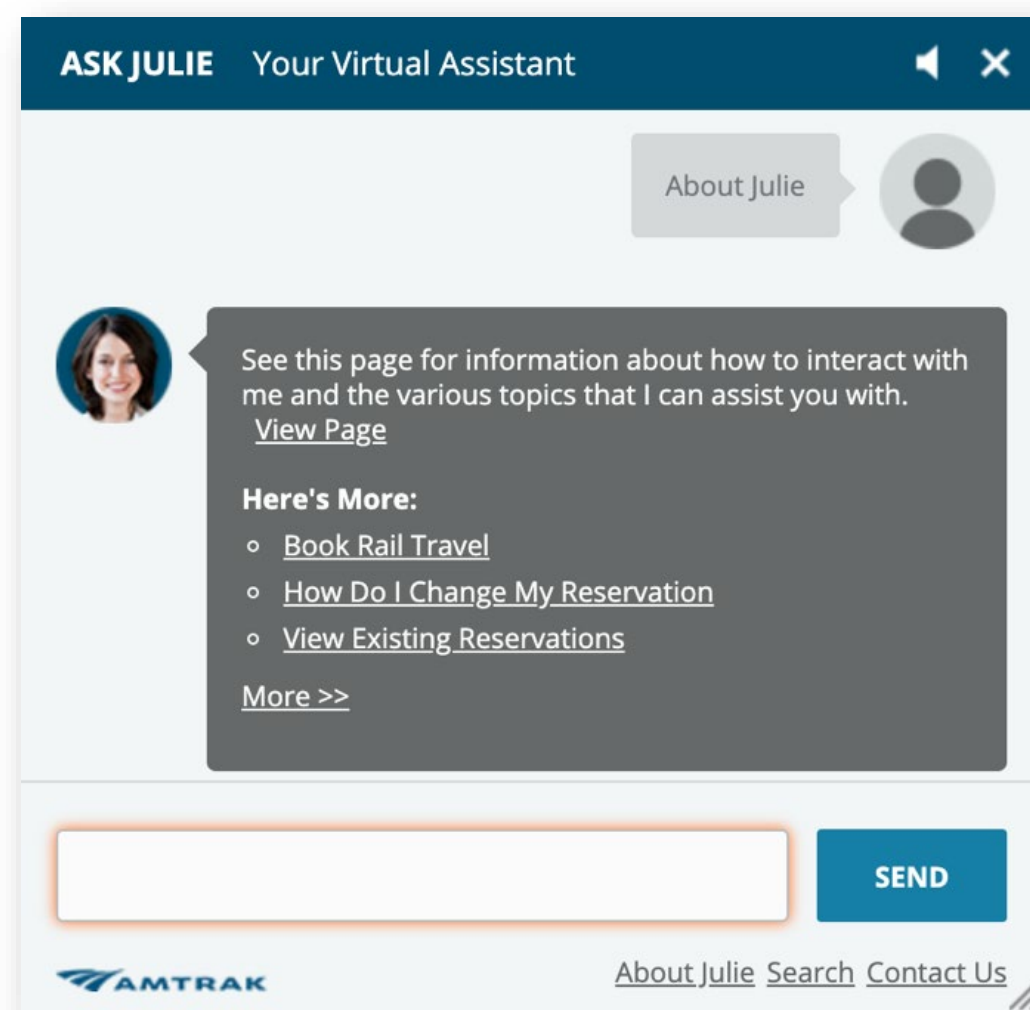


Benefits of Chatbots

1. Improved Engagement & Qualification
 - Keep connected throughout the entire customer journey
2. Enhanced Conversion Rates
 - Open rates over 80% and click-through rates over 50%
3. Reduce Costs
 - Conversational commerce can handle 10x the typical transactional capacity of human agents alone



Unlikely Success Story



- Amtrak
 - 20,000 employees serving 30 million customers per year
 - Almost 400,000 website visitors per day
- Julie – On-site chat solution
 - 800% ROI
 - Increased bookings by 25%
 - Saved over \$1 million in customer service expenses
 - Answered over 5 million questions in a single year
 - Julie's bookings were +30% revenue



Uncanny = Bad

In Summary:

1. Talk “**with**” not just “**to**” your audience
2. Know what questions you need to **answer**
3. Think about an ideal conversation “**flow**”
4. Think about what you could **automate**, but...
5. Don’t ignore the **human** element

READ MORE ABOUT THIS TOPIC & MORE IN OUR 3RD BOOK



Available on Amazon and other online book retailers. Search “WSI Digital Minds” or visit

<https://bit.ly/wsibook3>



Now it's time for some Q&A

REACH OUT TO YOUR LOCAL WSI CONSULTANT

Talk to us, we can help!

Want to discuss how technology can amplify and enhance your customer conversations?

Reach out to your WSI Consultant or email contact@wsiworld.com.



JOIN US FOR OUR NEXT WEBINAR

Website Conversions: How to Convert More of Your Website Visitors into Leads

Wednesday, May 6th at 11:30 AM EDT
With Chuck Bankoff
California, USA



AHEAD OF THE CURVE SERIES EXTENDED!

3 New Informative Sessions



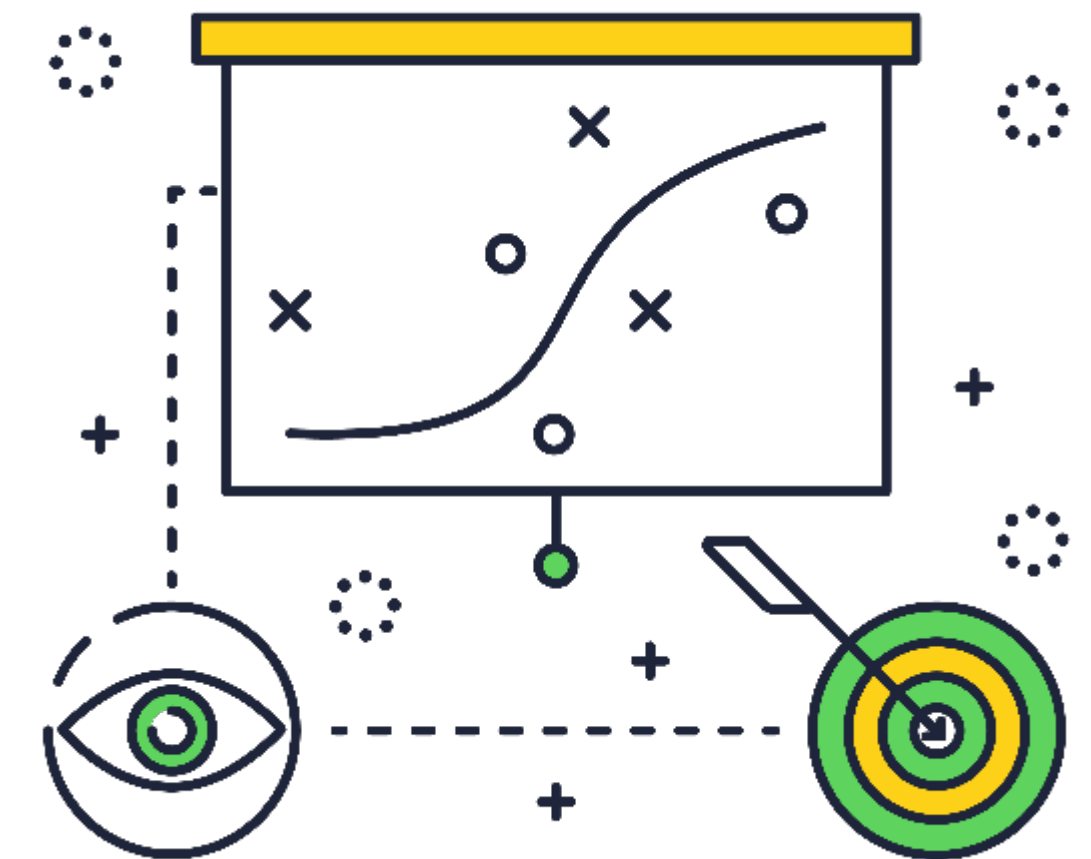
May 13th @ 11:30 AM EDT

How to Optimize Your Digital Presence During COVID-19



May 20th @ 11:30 AM EDT

Tracking the Insights that Matter Most to Your Business



May 27th @ 11:30 AM EDT

Defining Your Post-COVID-19 Digital Marketing Plan



See you next time!
Stay Safe & Keep Healthy