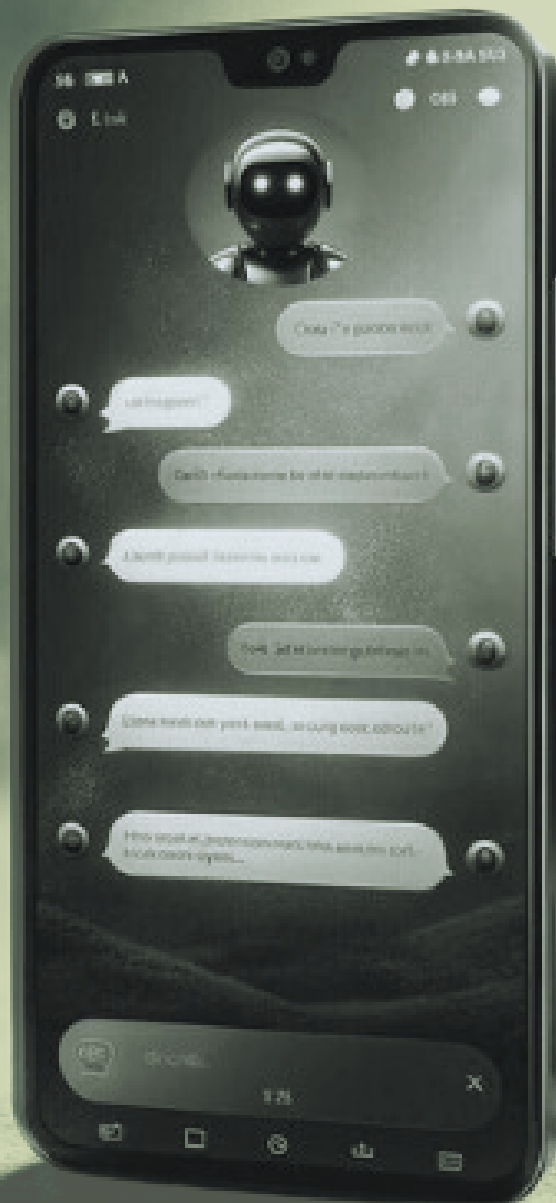
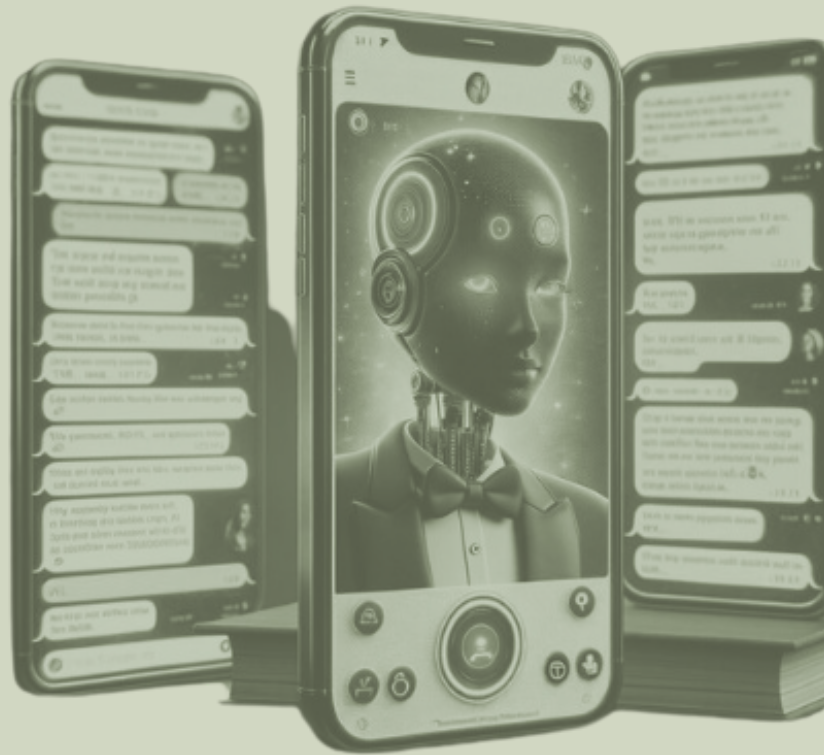


# A.I. AUTOMATION

WITH SMART CHATBOT ASSISTANTS



HOW TO GET STARTED SETTING UP SMART CHATBOT  
AUTOMATIONS IN YOUR BUSINESS FOR LEAD  
GENERATION AND ENGAGEMENT



## CHAT WITH OUR SMART AI ASSISTANT

If you want to see how a customer service assistant works, click below and chat with Sparky.



[CLICK HERE](#)

# WELCOME

**ARE YOU TIRED OF SPENDING HOURS CREATING CONTENT FOR SOCIAL MEDIA AND HEARING CRICKETS? DO YOU NEED A LEAD GENERATION TOOL THAT ACTUALLY WORKS?**

AI Automation is here to help! No longer do you have to suffer through those horrible, robot-like automated chatbot responses that marketers have been shoving in your face for years now.

Introducing "Smart AI Assistants". Take your business to the next level with the best AI Assistants driving the digital marketing industry into overdrive!

The following Guide is designed to help you understand what smart AI Assistants are and how they can elevate your business marketing strategies and customer experiences. It will give you a starting point to understand how and why to implement these powerful assistants in your marketing strategy and customer support.



# THE FUTURE OF BUSINESS WITH A.I.

There are certain aspects of business that haven't changed much over time, and probably never will.

You need to **have a product or service**,  
you need to **have an audience** that wants it,  
you need to **get it in front of the audience** and  
you need to **give them a way to buy it**.

"How" we accomplish these steps may have changed over the course of time, especially with the access to Artificial Intelligence tools, but the "what" or the core steps through the customer journey have remained basically the same.

There is no "one best way" to set up your customer experience. In business, choosing the right vehicle to deliver your services, or having the right strategy to build your brand on social media, or creating the best offer to present to your audience can be very subjective. What works for your brand might not be the best choice for the next guy, and vice versa. Know your brand and your market. Choose your "best way" accordingly.

However, with the introduction of A.I. and all the exciting capabilities it offers to business operations; automation is quickly becoming a necessity to stay competitive. Today, whatever your "best way" might be...it must include AI Automation.

*"IF THE RATE OF CHANGE ON THE OUTSIDE EXCEEDS THE RATE OF CHANGE ON THE INSIDE, THE END IS NEAR."*

*- JACK WALSH -*

ECOTEKSOCIAL

# INTRODUCTION TO SMART AI AUTOMATIONS

## **Automation Isn't New**

Automation is not new, especially on Facebook and Instagram. Many accounts have automatic replies setup on their posts and direct messages to engage with their users and customers. Most business marketing strategies include automatic email sequences and automated webinar and sales funnels. Chat pop up windows have been around for quite a while (although clunky and not very useful). But A.I. has changed the game when it comes to automation. We can now implement "smart automations".

## **What Are Smart Automations?**

Smart automations are advanced Assistants powered by artificial intelligence (AI) that interact with your customers in real time (you may know them as chatbots). Unlike the old legacy chatbots that could only handle a limited set of pre-programmed questions and often failed to provide useful responses, modern AI-driven chatbots are much more sophisticated. They can understand a wider range of queries, offer human-like interactions, and provide valuable information about your business and your industry if they are properly trained.

## **The Evolution from Legacy Chatbots to AI Assistants (smart chatbots)**

Old legacy chatbots were limited and often frustrating for users. They could only respond to specific, predefined questions. If a user asked something unexpected, these chatbots would either repeat themselves or give an unhelpful response like "I don't understand. Can you repeat that?" or "I don't understand, can you ask something different?" Many times they would just flat out break completely. This often led to poor user experiences and lost sales.

Today, AI agents have revolutionized the way we think about chatbots. With advanced AI and prompt engineering, these smart agents can understand context, provide accurate answers, and interact naturally with users. They are capable of intuitive reactions and can handle a wide variety of scenarios, making conversations feel more human-like and engaging. AI is rapidly changing the game and your competitors are already playing by the new rules. Will you get in the game before it's too late?

# BENEFITS OF SMART AI AUTOMATIONS

## Benefits of Using Chatbots on Social Media

- **Responding to Comments:** Automations can instantly respond to comments on your posts, keeping your audience engaged and informed.
- **Delivering Information:** Provide immediate answers to common questions about your products or services.
- **Directing Conversations:** Guide users to the right resources or next steps, such as signing up for a newsletter or making a purchase.
- **Saving Time:** By automating interactions, you can free up valuable time that would otherwise be spent manually responding to each comment or message.
- **24/7 Availability:** Your chatbot can work around the clock, providing support and information to your customers at any time.
- It's like having the perfect community engagement manager. Never late, always does what you tell it to do, it doesn't talk back (unless you tell it too!), no complaining, no sick days, and you don't have to pay it a salary. 😊

*"TECHNOLOGY MAKES WHAT WAS ONCE IMPOSSIBLE  
POSSIBLE. THE DESIGN MAKES IT REAL"*

*-MICHAEL GAGLIANO-*

# USE CASES FOR SMART AI AUTOMATIONS

## Other Benefits of Using Chatbots In Your Business

Beyond basic interactions, AI automations can handle a variety of advanced features to streamline your business operations.

Here are some powerful ways to use chatbots:

- **Appointment Setting:**
  - Automate the scheduling of appointments.
  - Example: Users can book appointments directly through the chatbot, which syncs with your calendar.
- **Call Center Automations:**
  - Direct calls to the appropriate department or provide automated responses to common queries.
  - Example: Use a chatbot to handle initial customer inquiries and route them to the right agent.
- **CRM and Inbox Live Agent Transfers:**
  - Integrate with your CRM to track and manage customer interactions.
  - Example: Transfer complex inquiries to a live agent for a personalized touch.
- **Bookings:**
  - Automate the booking process for various services.
  - Example: Users can book hotel rooms, flights, or event tickets through the chatbot.
- **Restaurant Takeout:**
  - Simplify the ordering process for takeout and delivery.
  - Example: Customers can place orders and customize their meals directly through the chatbot.
- **Other Examples:**
  - Customer Feedback: Collect feedback and reviews from customers.
  - Loyalty Programs: Manage and promote your loyalty program.
  - Event Registrations: Automate sign-ups for webinars, workshops, and other events.

The possibilities are endless and only limited by your business parameters. These customized chatbots can save you time and money by automating repetitive tasks and providing seamless interactions for your customers.

# AUTOMATION IN YOUR MARKETING FUNNEL

## **ADDING AUTOMATION TO YOUR MARKETING FUNNEL**

Understanding a marketing funnel and how automation can be integrated into its different sections is crucial. When you start implementing automation, especially chatbot automation into your marketing funnel, it's important to see the complete picture of how all the pieces interact and fit together. The transition from one part of the funnel to the next must be smooth and seamless for the user.

This ensures that your customer is guided through the funnel in a way that makes them feel comfortable and at ease. By the time they reach the final destination of conversion, purchasing becomes a natural and positive action for them.

*"IT IS NOT THE BEAUTY OF A BUILDING YOU SHOULD LOOK AT; IT IS THE CONSTRUCTION OF THE FOUNDATION THAT WILL STAND THE TEST OF TIME."*

*-DAVID ALLEN COE-*

# THE MARKETING FUNNEL

MAPPING OUT THE CUSTOMER JOURNEY

START

1

## AWARENESS

Awareness is all about getting your brand in front of as many eyes as possible. Think of it as the "Hey, I'm here!" stage. You want to attract people who might be interested in what you offer. This can be done through social media posts, ads, blog content, or even word of mouth.



2

## CAPTURE

Once people know about you, the next step is to capture their information. This usually means getting their email address or phone number so you can keep in touch. A great way to do this is by offering something valuable for free, like an ebook, checklist, or discount. This freebie is known as a lead magnet.

3

## NURTURE

Now that you have their contact information, it's time to build a relationship. Send them useful and relevant content, answer their questions, and show them why your product or service is the best. This stage is about keeping their interest and warming them up for a purchase.



4

## CONVERT

Finally, it's time to turn these warm leads into paying customers. This can be done through a well-timed offer, a special promotion, or simply making it easy for them to buy from you. The key is to make the transition from interest to purchase as smooth as possible.

(not the)  
END

# THE MARKETING STRATEGY

ALL THE PIECES IN PLACE



These are the core elements of a marketing strategy. Mark off yes or no if you need improvement in each section.

## MARKETING FUNNEL

A marketing funnel guides your audience from the awareness stage to the conversion stage. It includes steps like capturing leads with a lead magnet, nurturing them with valuable content, and eventually converting them with an offer.

## DEFINED VALUE LADDER

A value ladder is a series of increasingly valuable offers that help customers get more benefits while increasing your revenue.

## AN IRRESISTIBLE OFFER

Having an Irresistible Offer: Your offer is what you are selling. It should be something that solves a problem or fulfills a need for your target audience. Make it clear why they need it and how it will benefit them.

## A LEAD MAGNET

A lead magnet is a free item or service given away for the purpose of gathering contact details. This could be a free trial, a downloadable resource, or an exclusive discount. The goal is to entice your audience to share their information with you and place them in your funnel.

## SOCIAL MEDIA STRATEGY

Your social media strategy is how you will use platforms like Facebook and Instagram to reach and engage your audience. This includes regular posting, running ads, and interacting with your followers.

## EMAIL SEQUENCE FOLLOW-UP

Once someone enters your funnel, you need to keep in touch with them. This is where an email sequence comes in. It's a series of emails sent over time to nurture leads, provide value, and encourage them to take action.

## SMART AUTOMATIONS/TRACKING

Automations can be integrated into every step of your customer journey and marketing funnel. They can help attract new leads, capture their information, nurture them with personalized content, and convert them into paying customers. Tracking helps you identify what is working and what needs adjusting.

YES NO

**Map out where your Automation Strategy can be implemented in your overall Marketing Strategy on the next page.**



# HOW AUTOMATION FITS IN

Design your Automation Strategy to fit into your overall Marketing Strategy.

## DEFINING YOUR GOALS

Setting clear goals is the first step in planning your automation strategy. What do you want to achieve with your chatbot? Here are some examples:

- **Lead Generation:** Capturing potential customer information for future follow-ups.
- **Customer Support:** Providing instant answers to common questions.
- **Sales:** Guiding users through the buying process or offering products directly.
- **Engagement:** Increasing interaction with your social media content.

### GOAL SETTING

- Write down your primary goal
- List any secondary goals



Map out where your Automation Strategy can be implemented in your overall Marketing Strategy on the next page.

*"A GOAL PROPERLY SET IS HALFWAY REACHED."*

*- ZIG ZIGLAR -*

# HOW AUTOMATION FITS IN

## SPECIFIC AUTOMATION FUNCTIONS FOR YOUR CHATBOT

### LEAD GENERATION

There are several ways to use chatbots for lead generation. With Facebook and Instagram specifically, you can use a chatbot to respond to comments, send DMs and deliver lead magnets. You can capture user's contact information and add them to a segmented list. Write down some of the ways you will use chatbots to help with lead generation. Expand on a few suggestions listed below.

#### LEAD GENERATION WITH CHATBOTS ON FB AND IG



- Deliver Lead Magnets: Capture name, email and phone info
  -
- FB and IG comment replies
  -
- Call to Action Keywords
  -
- VIP Programs
  -

# HOW AUTOMATION FITS IN

## SPECIFIC AUTOMATION FUNCTIONS FOR YOUR CHATBOT

### **CUSTOMER SUPPORT**

Having a chatbot that can engage intelligently with the user is improved customer service all by itself...but there are unlimited uses that a chatbot can provide to make the customer experience more desirable, and often times more efficient and accurate as well. Brainstorm some of the ways you will use the chatbot to provide better customer support to your audience.

#### IMPROVE CUSTOMER SUPPORT WITH CHATBOTS ON FB AND IG

- Answer FAQs
  -
- Book Appointments
  -
- Collect Surveys and Feedback
  -
- Multi-Lingual Support
  -

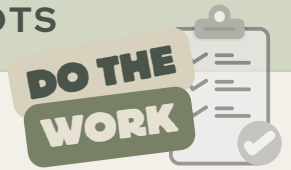


# HOW AUTOMATION FITS IN

## SPECIFIC AUTOMATION FUNCTIONS FOR YOUR CHATBOT **SALES**

Chatbots can deliver your offers, follow up with tracking and even manage your courses and events. If you have an e-commerce business, chatbots can offer galleries and carousels of your products and makes transactions right inside the conversation.

### PROMOTING OFFERS AND MAKING SALES WITH CHATBOTS



- E-Commerce / Shopping Cart
  -
- Digital Product Delivery
  -
- Galleries, Catalogs, Menus
  -
- NFC
  -

# HOW AUTOMATION FITS IN

## SPECIFIC AUTOMATION FUNCTIONS FOR YOUR CHATBOT **ENGAGEMENT**

When it comes to social media, engagement is key. Finding ways to communicate with your audience that gives value, saves them time, makes them feel seen, and answers their questions without friction or fluff is important if you want them to stick around. Write down ways you will keep engagement fun and interesting for your audience.

### ENGAGEMENT WITH CHATBOTS ON FB AND IG



- FB and IG comment replies
  -
- Call to Action Keywords
  -
- Quizzes
  -
- Other
  -

# HOW AUTOMATION FITS IN

## OTHER SPECIAL USES FOR AI CHATBOTS FOR FB AND IG

AI chatbots can be highly effective in increasing and making more efficient the engagement on Facebook and Instagram by leveraging several key features and functionalities tailored to these platforms. Here are some ways they can be utilized:

### 1. Automated Responses

**Instant Messaging:** AI chatbots can automatically respond to comments and direct messages, providing quick and consistent engagement with followers.

**FAQ Handling:** Common questions can be answered immediately, reducing response time and keeping followers engaged.

### 2. Personalized Interactions

**Customized Replies:** Chatbots can use customer data to personalize responses, making interactions more meaningful and engaging.

**Targeted Content:** By analyzing user behavior and preferences, chatbots can recommend relevant content, products, or services.

### 3. Content Delivery

**Scheduled Posts:** Chatbots can help schedule and post content at optimal times to maximize reach and engagement.

**Interactive Content:** They can deliver interactive content like polls, quizzes, and surveys directly through messaging, encouraging active participation.

### 4. Lead Generation

**Capturing Leads:** Chatbots can engage with users through comments or direct messages to capture leads by collecting contact information or directing them to sign-up forms. **Follow-Up:** Automated follow-up messages can be sent to nurture leads and guide them through the sales funnel.

### 5. Customer Support

**Real-Time Assistance:** Providing real-time support for customer inquiries directly within Facebook Messenger and Instagram Direct can improve customer satisfaction. **Problem Resolution:** Chatbots can handle simple issues or escalate more complex problems to human agents efficiently.

### 6. Promotions and Campaigns

**Exclusive Offers:** Chatbots can send exclusive promotions, discount codes, or early access to sales directly to followers, increasing engagement and conversion rates. **Event Reminders:** Automated reminders for upcoming events, live streams, or product launches can keep your audience informed and engaged.

### 7. Feedback Collection

**Surveys and Reviews:** Chatbots can conduct surveys and collect reviews from followers, providing valuable feedback and making users feel heard.

**Sentiment Analysis:** Analyzing feedback to gauge customer sentiment and adjust strategies accordingly.

### 8. Contest and Giveaway Management

**Running Contests:** Automate the management of contests and giveaways, from entry collection to winner announcement, ensuring smooth execution and high participation. **Engagement Boost:** Prompt followers to participate by sending reminders and updates about the contest.

### 9. Story Integration

**Interactive Stories:** Use chatbots to create interactive story experiences where users can make choices and get instant responses, keeping them engaged. **Swipe-Up Links:** Direct users to specific content or offers via swipe-up links in stories, facilitated by chatbot interactions.

### 10. Community Building

**Group Management:** Help manage Facebook Groups by welcoming new members, moderating discussions, and sharing valuable content.

**Engagement Prompts:** Encourage users to participate in group discussions or comment on posts through automated prompts.

# HOW AUTOMATION FITS IN

OTHER SPECIAL USES FOR AI CHATBOTS FOR FB AND IG

**BRAIN DUMP INFORMATION FOR MORE CUSTOM CHATBOT USES HERE**

-

-

# PLAY BY THE RULES

MAKE YOUR CHATBOTS COMPLIANT, RESPECTFUL AND HONEST

When using chatbots, especially for customer interactions on platforms like Facebook and Instagram, it's crucial to be aware of several safety, security, and integrity considerations. Here are some warnings and best practices:

## **Facebook Messenger and Instagram Rules:**

- When using smart automations on Facebook Messenger and Instagram, it's crucial to be aware of, and comply with Meta's rules and policies. Improper automations can lead to your account being flagged or suspended. Many chatbot building agencies overlook or neglect these compliance rules, but understanding and following them is essential for maintaining your account's integrity and functionality.

## **Data Privacy and Security**

- Sensitive Information: Avoid collecting sensitive personal information such as social security numbers, credit card details, or health information through chatbots. If necessary, ensure that the data is encrypted and securely stored.
- Compliance: Ensure your chatbot complies with data protection regulations such as GDPR, CCPA, and others relevant to your location and industry. Obtain explicit user consent before collecting any personal data.

## **Transparency and Consent**

- Clear Communication: Inform users that they are interacting with a chatbot and not a human. Clearly state the chatbot's capabilities and limitations.

## **Avoiding Misuse and Abuse**

- Spam Prevention: Implement measures to prevent the chatbot from being used to send spam or malicious content.
- Abuse Detection: Monitor interactions for abusive or inappropriate behavior. Implement safeguards to detect and address such issues promptly.

## **Accuracy and Reliability**

- Information Accuracy: Ensure that the information provided by the chatbot is accurate and up-to-date. Regularly review and update the chatbot's knowledge base.
- Error Handling: Have a plan for handling errors or incorrect responses. Provide users with a way to reach human support if the chatbot cannot resolve their issue.

*"WITH GREAT POWER COMES GREAT RESPONSIBILITY"*

- VOLTAIRE -



# TOOLS & RESOURCES

For more tools and resources visit [ecoteksocial.com](https://ecoteksocial.com) or click on the resources listed below:

## GET YOUR OWN CHATBOT

Are you ready to create your own custom AI Assistant for your business? Let's get that Chatbot built and installed on your website and working in your social media to engage with your customers. Set up an appointment now for a free audit and strategy session.

## YOUTUBE TUTORIALS

Check out our YouTube channel for tutorials and live videos on AI, Digital Marketing, and Content Creation tips. If there are videos or tutorials that you were interested in but can't find there please reach out and let us know we are always looking for new ways to provide value to our subscribers.

## JOIN THE COMMUNITY

Working as a Solopreneur or a solo business owner can sometimes feel isolating and overwhelming without support. We reduce that overwhelm by coming together with weekly co-working sessions in our private community. We would love to see you there.

## TEMPLATES AND CHECKLISTS

If If you are looking for templates or checklists to help map out your workflow or organize your business, we have a library of free and paid options available on our store. If you can't find what you need let us know and we will create it for you.

*"YOU DON'T HAVE TO SEE THE WHOLE STAIRCASE, JUST TAKE THE FIRST STEP."*

*- MARTIN LUTHER KING, JR. -*

Thank  
you!