Course 3, Lesson 5: "Chat-to-Close": Your AI Sales & Support Bot

1. Core Concept & Learning Objective

Concept: You are *losing sales* in your DMs. You can't manually answer 50 "how much is it?" DMs (or "FAQ" emails) 24/7. An "AI Chatbot" (a "mini-me" trained on your C1 MVO) can *instantly* answer 80% of "low-value" questions, *qualify* leads, and *book* sales calls, 24/7. This is your "AI Sales Rep."

Learning Objective: By the end of this lesson, you will **analyze** 3-5 "AI Chatbot" platforms (like ManyChat, Tidio, or a custom GPT). You will **develop** an "FAQ" document (your "bot's brain") and **build** a 3-step "Chat-to-Close" workflow that *qualifies* a lead and *sends them* to your C1 Sales Page.

2. Interactive Content Activities (3 Activities)

Activity 1: The "Chatbot" Platform Audit (Tool Exploration)

- **Description:** We're finding the "right" tool for your "AI Sales Rep."
- **Instructions:**
  1. Review these 3 "levels" of tools:
  2. **Level 1 (Simple): Custom GPTs** (e.g., ChatGPT).
     - *Pro:* You can "train" it (L11) on your "FAQ" (Act 2).
     - *Con:* It's not "on" your website 24/7.
  3. **Level 2 (IG/FB DMs): ManyChat**
     - *Pro:* Lives *inside* your Instagram DMs. Can "auto-reply" to story mentions or keywords.
     - *Con:* Can be "spammy" if not built correctly.
  4. **Level 3 (Website): Tidio / Intercom**
     - *Pro:* Lives *on* your C1 "1-Page HQ." Can "pop up" and engage leads.

5. **Your "Drill Sergeant" Choice:** For this lesson, we will focus on **ManyChat** (for IG) as it's the "fastest path to cash" (C1, L8) for a C2 (Video) strategy.

- **Expected Outcome:** You understand the *types* of chatbots and are ready to focus on an "IG DM Bot" (ManyChat).

Activity 2: The "Bot's Brain" (FAQ Doc) (Strategic Exercise)

- **Description:** Your bot is "dumb." We need to *give it a brain*. This "brain" is an "FAQ" doc about your C1 MVO (Minimum Viable Offer).

- **Instructions:**

  1. Open your L2 "Second Brain." Create a new "SOP" doc: "The Bot's Brain - MVO FAQ."

  2. List the 10-15 "dumb" questions you *always* get in your DMs.

  3. **Q1:** "How much is it?"

     - *A1 (The "Bot's" Answer):* "Great Q! The 'C1 MVO' is [Price]. It includes [3 Benefits]. You can book it at [C1 Sales Page Link]!"

  4. **Q2:** "What is [Your C1 MVO]?"

     - *A2 (Bot):* "The 'C1 MVO' is my [Product]. It's perfect for [Niche] who are struggling with [Problem]. More info at [Link]!"

  5. **Q3:** "Do you do 1:1 coaching?" (Your MVO)

     - *A3 (Bot):* "Yes! That's my 'C1 MVO.'..."

- **Expected Outcome:** A 1-2 page "FAQ" doc. This is the "script" your AI Sales Rep will use.

Activity 3: The "Chat-to-Close" Workflow (Tool Exploration)

- **Description:** We're building the 3-step "automation" in a tool like **ManyChat**.

- **Instructions:**

  1. Log in to ManyChat (or a similar tool).

  2. **Step 1: The "Trigger"**

     - "If a 'User' sends a DM containing the keyword ['PRICE' or 'MVO' or 'COACHING']..."

  3. **Step 2: The "Reply" (The "Bot's Brain")**

- "...Wait 3 seconds. *Then* 'auto-reply' with: [Paste your 'A1' (or 'A3') answer from Activity 2]."

4. Step 3: The "CTA" (The "Close")

- (Your "A1" answer *must* include the *link* to your C1 Sales Page).

- **Expected Outcome:** A *functional* 3-step "automation" that *instantly* answers your most common sales question (FAQ) 24/7, and *always* sends the user to your "Buy" page.

3. Assignment & Project Milestone (Portfolio Deliverable)

Assignment: The "AI Sales Rep" Workflow

- **Description:** This is your "SOP" for your AI Sales Rep. You will submit your "Bot's Brain" (the FAQ script) and a *screenshot/flowchart* of your "Chat-to-Close" automation.

- **Step-by-Step Instructions:**

1. Create a new document titled "[Your Name] - AI Sales Rep SOP."

2. Section 1: The "Bot's Brain" (The "Script")

   - Paste your 10-15 "Q&A"s from Activity 2.

3. Section 2: The "Chat-to-Close" Workflow (The "Automation")

   - Take a *screenshot* of your 3-step automation (Trigger > Reply > CTA) from ManyChat (or other tool).

   - *If you can't build it:* Draw a *flowchart* (C1, L11 style) showing the 3 steps.

4. Section 3: The "Trigger" Video (The "Bait")

   - Write *one* "Video CTA" (C2, L11) that *activates* this bot (e.g., "Want my free [Lead Magnet]? DM me the word 'FREE'!" ... "FREE" is now your "Trigger").

- **Evaluation Criteria:**

   - *Excellent:* The "Bot's Brain" (FAQ) is *detailed,* and the answers are strategic (they *always* link back to the C1 MVO/Sales Page). The "Workflow"

screenshot/flowchart is *clear* and *functional*. The "Trigger" video CTA is included.

- *Adequate:* The "Bot's Brain" is just 3 questions. The "Workflow" is missing. The student doesn't understand how to "trigger" the bot.

- **Connection to Final Project:** This **"AI Sales Rep" SOP** (the FAQ doc and the Workflow map) is **Section 5: The "Chat-to-Close" Bot SOP** of your **AI-Powered Operations Playbook**. This is your 24/7 "Sales" team.

4. End-of-Lesson Assessment (7 Questions)

1. **(MC)** What is the *primary* goal of an "AI Chatbot" (in this lesson)?

    - A) To "annoy" users with pop-ups.

    - B) To "replace" all human connection.

    - C) To *instantly* answer 80% of "low-value" (FAQ) DMs, *qualify* leads, and *send them* to your sales page 24/7.

    - D) To write C2 video scripts.

2. **(MC)** What is the "Bot's Brain" (Activity 2)?

    - A) A 10-15 "Q&A" document that acts as the "script" for your AI bot, based on your C1 MVO.

    - B) A "Custom GPT" that you build.

    - C) The "AI" itself.

    - D) The C1, L11 "Launch Day" plan.

3. **(MC)** In our 3-step "Chat-to-Close" workflow, "Keyword: 'PRICE'" is the...

    - A) The "Reply."

    - B) The "CTA."

    - C) The "Trigger."

    - D) The "Bot's Brain."

4. **(SA)** What is a "Level 2" (IG/FB DM) Chatbot tool we recommended? (From Activity 1).

5. **(SA)** In the "Bot's Brain" (FAQ Doc), *every* answer (e.g., "A1") *must* include *what* "CTA"?

6. **(SA)** What is the *benefit* of "automating" the "how much is it?" DM?

7. **(Scenario)** A student says, "I *love* getting 50 'how much is it?' DMs. It makes me feel 'popular,' and I 'hand-type' the answer to every one." What "Drill Sergeant" (C1, L1) feedback would you give them?

Correct Answers: 1(C), 2(A), 3(C) 4. ManyChat. 5. (Example) The link to your C1 "Sales Page" or "Booking Page." 6. (Example) "You save 1-2 hours a day (your $500/hr time), and the 'lead' gets an instant answer (and 'buy' link) while they are 'hot'... not 8 hours later when you 'check your DMs'." 7. (Example) "You're acting like a '$20/hr