



Draft Project Plan for Website Chat Solution

Created for Kara Taylor, Executive Vice President

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1: Project Initiation

The goal of this project is to implement a Chat Solution for the ATTOM public website (attomdata.com). This includes both “chatbot” and “live chat” features to start.

2: Business Case

The business case for this project is to: (1) better qualify leads; (2) increase the ATTOM sales pipeline and total leads; and (3) increase lead conversion rates; and (4) provide personalized service and an increased level of engagement with prospective clients.

According to 2020 data provided by Intercom, website visitors are 82% more likely to convert to customers if they have utilized a web chat solution first. In terms of customer preference, “live chat now ranks higher than phone, email, and social media (neilpatel.com, March 2021).”

3: Scope:

The initial project scope includes the following activities:

- Do initial research internally across Marketing, LDR, and BI teams to determine the functionality and integrations ATTOM is seeking – and the size of the proposed ATTOM Chat support team (seats). For example, do we want to integrate chat with ATTOM email (Teams) and phone (cross functionality) or silo functionality to start?
- Identify three potential vendors, such as Intercom, that focus on middle market businesses. As of today, I would recommend starting with Intercom (starts at \$39 per seat), JivoChat (#1 ranked, starts at \$13 per seat) and LiveChat (starts at \$16 per seat). At the end of this document, I have provided Exhibit 1.0 with brief overviews on these three potential vendors.
- Create an internal ATTOM Chat project team to participate in all project demos, free trials, and eventual implementation.
- With our three potential Chat vendors, schedule sales calls and demos for the ATTOM Chat team and internal stakeholders – and then schedule free trials.
- Develop a test plan and workflow for the free trials, utilizing ATTOM’s back-up website on the WP Engine development server as a segregated platform for testing.
- Work with the UX design team to develop a proposed layout on the ATTOM development website to accommodate both Chat and footer-based forms (which are

a potential final implementation blocker as footer form testing should be completed prior to the final live install of a Chat Solution).

- Develop an internal calendar/roadmap (Gantt chart) and communication plan for trials.
- Create an internal web survey to be completed by all proposed Chat team members to gain user feedback, prior to identifying a final Chat solution.
- Utilizing internal surveys, functionality, pricing considerations, and strength of integration with Salesforce and Pardot, select a final Chat platform for launch.
- Develop workflows, milestones, and roadmap (with Gantt chart) for final Chat solution implementation. This will include a finalized work breakdown schedule (WBS) with internal stakeholders, key milestones, and a final communications plan for final Chat solution implementation.
- Develop a risk management plan for implementing the Chat solution and service model for how Chat Solution technical and functional errors will be addressed internally (on an intra-daily basis). Within the risk management plan, include potential blockers, such as maintaining our reporting standards for leads, potential impacts and skews to lead reporting across Salesforce, and housing of Chat Solution conversation logs, reporting, and management.

4: Project Execution

- From demo and trial work with internal stakeholders and the Chat project team, create a final project execution team for the Chat Solution implementation.
- Assign internal resources as needed across Marketing, LDR, BI, and IT.
- Set up a Jira Sprint on the ATTOM Marketing Jira instance to execute the implementation of the final Chat Solution, shooting for a July 31st end-date. I am proposing that we finalize all Pardot footer form testing and roll-out before a Chat Solution is launched (for UX design and usability purposes).
- Hold weekly or twice weekly Chat Solution meetings to finalize all components of launch and to keep the team on track.
- Update and modify project schedules as needed, as we bump up against the Risk Management Plan and potential blockers.

5: Project Performance and Monitoring

- Prior to Project Execution, set up a focused project performance plan for post launch, which will capture all key performance indicators across project deliverables, quality deliverables, along with effort and cost tracking. KPIs will be built around the

metrics ATTOM currently tracks for lead generation reporting in Pardot and Salesforce.

6. Project Closure

- Once the project is completed and launched, KPIs are being reported daily/weekly/monthly, and internal technical support is fully in place, create a project “punch-list” of potential integrations (and other items) that were not completed during the Chat launch.
- Hold a post-mortem meeting with all internal stakeholders and the ATTOM Chat project team. Identify areas for improvement, final project cost and ROI, and deliver a final project report to the entire project team and senior internal stakeholders.
- House all Chat Solution project documents within the ATTOM Marketing Jira instance on a set page or set of pages in Confluence. This Confluence section should contain all project documents, workflows, surveys, and links to schedules/roadmaps.

Exhibit 1.0 – Potential Chat Solution Vendors

1. JivoChat, URL: jivochat.com

JivoChat is branded as an all-in-one business messaging solution. It allows you to communicate with customers via phone, email, social, and of course, live chat—all from a single platform. It seamlessly integrates with popular tools and services like Slack, WordPress, WooCommerce, and Salesforce. More than 284,000 websites worldwide rely on JivoChat, making it one of the most popular solutions on the market today. Here’s a quick overview:

- Compatible with Outlook/Teams, Facebook, WhatsApp, and many others
- All customer communication is managed from a single window
- The live chat widget works on every device, browser, and OS
- Automatic proactive messages based on custom triggers
- CRM integrations and visitor’s information (like location and click source)
- Chat logs and reports between customers and agents

JivoChat offers unlimited chats and websites on every plan. Pricing starts at \$13 per month per agent, which gives you access to all JivoChat’s features. Free trials are provided for 14 days.

2. LiveChat, URL: livechat.com

This tool is trusted by 30,000+ businesses in over 150 countries, including names like PayPal, McDonald’s, Adobe, and Mercedes-Benz. The software is used for online chat, multichannel support, lead generation, online surveys, in-app support, net promoter score, and more—making it one of the most versatile solutions on the

market today. Here's a quick overview:

- Use custom forms and AI chatbots to qualify leads
- Automatically track sales and KPIs to monitor efficacy
- Automatic agent routing and ticket creation
- Segment visitors based on their behavior on your website
- 170+ integrations (Dropbox, BigCommerce, MailChimp, and Salesforce)

Plans start at \$16 per agent per month – and there is a 14-day free trial.

3. Intercom, URL: [intercom.com](https://www.intercom.com)

Intercom is branded as a “conversational relationship platform,” helping users to build and further customer relationships through messaging and live chat. The software is trusted by 30,000+ companies across the globe, including Microsoft, IBM, Udemy, and Sotheby's. Here's a quick overview:

- Boost site conversions with targeted messages, bots, and real-time chat
- Onboard, activate, and re-engage customers with outbound communication
- Proactive support tools and self-help features
- Manage customer interactions across all channels from a single dashboard
- 250+ integrations out-of-the-box and APIs for custom integrations

The software starts at \$39 per month for basic live chat and outbound messaging features. The Intercom “Accelerate” plan starts at \$499 per month and includes ten seats. This plan comes with custom bots and set team inboxes. Intercom also provides a 14-day free trial.