

Checklist

PREPARING YOUR BUSINESS FOR A CHATBOT

Before investing in a chatbot for your small business, complete this planning checklist to ensure you're making the right decision and have the foundation for successful implementation. Proper planning will help you choose the right solution, set realistic expectations, and prepare for an effective launch.

1. Assess Your Business Needs

☐ Document repetitive customer questions

Identify and record the questions your business receives most frequently. These repetitive inquiries (like business hours, pricing, and policies) are prime candidates for chatbot automation and will form the foundation of your chatbot's knowledge base.

☐ Analyze customer contact patterns

Review your email inbox, phone logs, and social media messages from the past month to identify when

customers reach out most frequently and which channels they prefer. This helps determine if after-hours support is a significant need for your business.

- ❑ **Calculate time spent on routine customer service**

Track how much time you and your team currently spend answering basic questions that a chatbot could handle. Multiply this by your hourly value to understand the potential ROI of automation.

- ❑ **Evaluate your customer demographics**

Consider your customers' comfort level with technology. If your customer base skews older or less tech-savvy, they might prefer traditional communication methods over chatbot interactions.

2. Define Your Chatbot Strategy

- ❑ **Select one primary objective for your chatbot**

Avoid trying to solve all customer service challenges simultaneously. Choose one main goal (answering FAQs, capturing leads, or providing basic product information) to ensure your chatbot delivers real value from day one.

- ❑ **Map conversation flows for common interactions**

For each common customer question, sketch out the most helpful response sequence, including additional information customers typically need after the initial answer. This creates smoother customer experiences.

☐ **Identify situations requiring human intervention**

Determine which complex issues (complaints, technical support, high-value sales) should always be escalated to a human team member. Plan clear handoff procedures for these scenarios.

☐ **Set measurable success metrics**

Define specific, measurable goals for your chatbot implementation. These might include conversation completion rate (aim for 70-85%), response time (under 30 seconds), customer satisfaction scores, or lead generation numbers.

3. Resource Assessment

☐ **Evaluate your budget constraints**

Determine how much you can realistically invest in a chatbot solution. Rule-based chatbots typically cost \$20-100/month, while AI-powered solutions range from \$100-500/month. Factor in potential setup costs as well.

☐ **Assess your technical comfort level**

Be honest about your technical skills. Modern chatbot platforms don't require programming knowledge, but you should feel comfortable learning new software and following step-by-step instructions.

- ☐ **Plan time commitment for setup and maintenance**
Budget 2-4 hours weekly for initial setup, plus 2-4 hours monthly for ongoing maintenance and improvements. If you can't commit this time, consider delaying implementation or delegating responsibility.
- ☐ **Check website compatibility**
Verify that your current website platform supports chatbot integration. Most modern websites work well with chatbots, but some legacy systems might require additional work.

4. Platform Selection Preparation

- ☐ **List must-have features for your situation**
Based on your business needs, identify the essential capabilities your chatbot must have (e.g., appointment scheduling, lead capture forms, multi-language support, or CRM integration).
- ☐ **Research suitable chatbot platforms**
Investigate platforms that match your needs, budget, and technical skill level. Consider Chatfuel, ManyChat, or Tidio for rule-based solutions, or Intercom and Drift for more sophisticated AI options.
- ☐ **Plan for testing before full launch**
Develop a testing strategy that includes internal team members and a small group of trusted customers who can provide honest feedback before your full public launch.

5. Team Preparation

- ☐ **Create handoff protocols for human support**
Establish clear procedures for when and how your chatbot should transfer conversations to human team members, including how staff can access previous conversation history.
- ☐ **Prepare response templates for common scenarios**
Draft clear, friendly responses to your most frequent customer questions. Use your brand voice and keep answers concise but complete to maximize chatbot effectiveness.
- ☐ **Develop a monitoring schedule**
Create a regular schedule for reviewing chatbot conversations, identifying improvement opportunities, and making necessary updates to maintain performance.
- ☐ **Plan staff training on chatbot capabilities**
Ensure your team understands how the chatbot works, its limitations, and how to handle conversations that get escalated from the automated system. This prevents confusion and maintains consistent customer service.

6. Content Creation

- ☐ **Write clear, conversational responses**
Create responses that match your brand voice while providing thorough information to common questions.

- ☐ **Develop conversation scripts for lead capture**
Design natural-feeling conversation flows that collect contact information without feeling like a static form.
- ☐ **Create escalation paths for complex inquiries**
Establish clear protocols for when and how conversations should transfer to human support.
- ☐ **Build in feedback collection mechanisms**
Add simple rating systems at the end of conversations to measure customer satisfaction.

7. Implementation & Testing

- ☐ **Install the chatbot on your website**
Follow platform instructions to add the chatbot code to your site or use available plugins.
- ☐ **Test on multiple devices and browsers**
Ensure your chatbot displays and functions properly on smartphones, tablets, and desktop computers.
- ☐ **Conduct thorough testing with team members**
Have colleagues try to "break" your chatbot by asking unexpected questions or providing unusual responses.
- ☐ **Fix identified issues and knowledge gaps**
Address any problems discovered during testing before launching to customers.

8. Launch & Optimization

- ☐ **Plan for a soft launch**

Initially activate the chatbot without announcing it, allowing time to monitor performance and make adjustments.

- ☐ **Brief your team on chatbot capabilities**

Ensure all team members understand how the chatbot works and when it will transfer conversations to humans.

- ☐ **Monitor conversations daily during the first week**

Actively review interactions to identify patterns in customer questions and areas for improvement.

- ☐ **Schedule regular review sessions**

Set aside time each week to analyze performance metrics, review failed conversations, and update responses based on customer interactions.