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5-Day Website Chatbot Implementation Workbook

A practical, low-risk five-session workbook for UK small businesses to plan, test, launch and improve a bounded website chatbot with human escalation, privacy and security checks.



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Chapter links and PDF bookmarks support navigation. Writing areas are for handwritten or separate notes, not interactive PDF forms.

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A practical, low-risk setup plan for UK small businesses

Author: Rob Arnold · Ascendea · <https://ascendea.ai/>

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A website chatbot can give visitors a clear first answer, point them to the right page or collect an enquiry for a person to handle. It cannot safely replace your judgement, customer-service team, or business policies. This workbook helps you build a small, supervised first version around questions you already answer well.

The five days are **five focused working sessions**, not a promise that every business can launch in one calendar week. Website access, content approvals, privacy decisions, testing and availability of a human responder may take longer. Pause rather than publish information you have not checked.

Before you start

Who this workbook is for

This workbook is for a UK small business owner, manager or team member with limited technical experience. It suits a local trade, retailer, professional practice, B2B service firm or similar business that wants a simple website-chat starting point.

It is deliberately not a build guide for a chatbot that gives regulated advice, takes binding actions, processes emergency requests, decides credit or employment outcomes, or sends messages without a person's approval. Those uses need specialist design, permissions and safeguards beyond this workbook.

What a useful first chatbot does

Start with **one purpose** and a narrow group of questions. A sensible first version may:

- answer approved questions about opening hours, service areas, appointment preparation, delivery options or a published policy;
- show links or buttons to useful pages;
- collect an enquiry for a named human team member; and
- recognise uncertainty and offer a human route instead of guessing.

It should **not** invent prices, availability, policy exceptions, technical diagnoses or promises. If an answer matters to a customer's decision, make the approved source easy to check and give the customer a human route.

Your working boundary

Write the boundary before choosing software. It is the simplest way to stop a helpful website feature growing into an uncontrolled project.

Decision	Your answer
One primary purpose	_____
Questions the chatbot may answer	_____
Approved information source	_____
Actions it may take	_____
Actions it must never take	_____
Human escalation route	_____
Named business owner	_____
Planned review date	_____

Roles to agree now

One person can hold more than one role in a very small firm. Name the person rather than relying on "the team".

Role	What they decide or do	Name
Business owner	Confirms purpose, boundaries and go-live decision	_____
Content owner	Checks every customer-facing answer against current business information	_____
Website administrator	Adds or removes the widget using the website's approved method	_____

Role	What they decide or do	Name
Chatbot administrator	Configures the platform, access and conversation paths	_____
Human responder	Receives escalations and follows up where appropriate	_____
Privacy/security contact	Checks data handling, access and incidents are routed appropriately	_____

Data, privacy and security: a proportionate starting point

A chat widget can collect personal data even when the question seems ordinary. Names, email addresses, phone numbers and a message that identifies someone should be treated with care. Collect only the information needed for the stated next step. Do not paste customer records, passwords, payment-card details or sensitive case information into an unapproved chatbot.

Before collecting an enquiry, decide what the business needs, why it needs it, who can see it, where it is sent, how long it is retained and how a person can ask for help. Show an appropriate privacy link near the point of collection. If the chatbot uses analytics, cookies or a third-party platform, check the provider's current documentation and your own privacy/cookie arrangements before enabling them.

For future marketing follow-up, do not assume that someone who starts a chat has agreed to receive promotion. The ICO distinguishes corporate subscribers from individual subscribers. Companies and LLPs are generally corporate subscribers, while sole traders and some partnerships are treated as individual subscribers for electronic-mail rules. Named business contacts can still be personal data. The applicable PECR and UK GDPR duties, including identity, opt-outs and the right to object, must be checked for the actual campaign. ICO guidance is under review, so recheck it before acting. [1](#)

Use the security settings your chosen service offers. The NCSC explains that an organisation remains responsible for configuration specific to its own use of a SaaS service. Give access only to people who need it; use robust sign-in protections offered by the service; remove access when someone leaves or changes role; and review access and configuration regularly. These steps reduce risk, but they are not a compliance guarantee. [3](#)

General education notice: This workbook is not legal, data-protection, security, financial or professional advice. Obtain suitable advice for your business, data, sector and contract. Provider features, policies and prices change; check current official documentation before implementation.

How to use the five days

Work through the days in order. Do not move to a live launch because the calendar says “Day 5”. Move on only when the stated outputs are complete and a responsible person has checked them.

Day	Focus	Useful output
1	Decide the job and map real questions	A defined purpose, question list and five simple conversation maps
2	Select, configure and connect a platform	A controlled test installation and one working flow
3	Build approved content, lead capture and handover	Core flows, safe fallbacks and a human route
4	Test with realistic questions	A test log, fixes and a launch decision
5	Prepare, launch carefully and monitor	A pre-launch check, monitoring plan and first-week improvement list

Day 1 — Decide the job and map the conversations

Morning: choose one primary purpose

Choose the first job your chatbot must do well. Do not choose “improve customer service” as the job; it is too broad to test. Choose a visible, bounded outcome instead.

Possible first purpose	A narrower example	Is this your first purpose?
Answer routine questions	“Answer the approved questions about service areas and opening times.”	Yes / No
Route enquiries	“Send new boiler-installation enquiries to the correct internal queue.”	Yes / No

Possible first purpose	A narrower example	Is this your first purpose?
Help with appointments	"Explain how to request a consultation and link to the booking page."	Yes / No
Guide a product or service choice	"Help a visitor find the relevant commercial cleaning service page."	Yes / No

My purpose statement:

Our website chatbot will for using information approved by .

Write what it will not do as well:

It will not .

Afternoon: collect questions from evidence

Use the last month of real enquiries where you are permitted to review them. Look at the shared inbox, contact-form submissions, web enquiries, phone notes and messages to the business. Ask the people who answer customers which questions recur. Do not copy unnecessary personal details into this workbook.

Give each question a simple score:

- **Frequency:** 1 means rare; 5 means it appears repeatedly.
- **Complexity:** 1 means the answer is a stable, short fact; 3 means the answer needs context, discretion, a lookup or a person.
- **Risk:** 1 means an incorrect answer has limited consequence; 3 means it could affect safety, money, rights, reputation or a sensitive situation.

Your first chatbot questions should usually be frequent, simple and low-risk. A low score does not make an answer safe automatically; the content owner still needs to approve it.

Customer question, in their words	Where you found it	Frequency 1–5	Complexity 1–3	Risk 1–3	Use in first version?
					Yes / No
					Yes / No
					Yes / No
					Yes / No
					Yes / No
					Yes / No
					Yes / No
					Yes / No

Choose **five** questions for the first build. You can add more later after you have seen how customers use the first version.

Evening: map each conversation before building it

A conversation map is a short decision path. It prevents you from writing an answer with no useful next step, and makes gaps easier to find.

For every chosen question:

1. Write the customer's plain-English question and likely variations.
2. Identify the approved source: a current policy, service page, price list, booking page or a confirmed internal answer.
3. Write a brief answer in the business's normal voice.
4. Offer one or two relevant next options, such as "See service areas", "Request a call" or "Ask another question".
5. State when the chatbot must stop and hand the person to a human.
6. Ask the content owner to check the answer, links and any time-sensitive wording.

Conversation map template

Part	Write your content
Customer intent/question	_____
Likely words or phrases	_____
Approved source and last check date	_____
Direct answer	_____
Helpful next option(s)	_____
If unclear, the chatbot says	_____
Human escalation trigger	_____
Content-owner approval	Name: ____ Date: ____

Fictional teaching example — a local electrical contractor

A visitor asks, “Do you cover my area?” The bot may state only the service areas confirmed on the contractor’s website, then offer “Check service area”, “Request a callback” and “Ask another question”. If the visitor describes an immediate danger, the bot should not diagnose or promise attendance. It should display the business’s approved urgent-contact instructions and a clear human route. The exact wording and procedure must come from the business, not this example.

Day 1 check-out

Before you finish, confirm that you have:

- ☐ named one primary purpose;
- ☐ selected five to ten frequent, simple and lower-risk questions;
- ☐ recorded the approved source for each initial answer;
- ☐ mapped at least five conversation paths; and
- ☐ named the person who will approve customer-facing wording.

Day 2 — Choose, configure and connect a platform

Morning: compare capabilities, not marketing claims

Do not choose a service because an advert says it is “AI-powered” or because a free trial feels easy. Compare two or three options against the job you defined on Day 1. Current pricing, plans, limits, data terms, integration methods and features can change, so record the date and use each provider’s official information.

Check	Option A	Option B	Option C
Can it support your first purpose without custom development?			
Does it work with your website platform or have a documented installation method?			
Can you keep the bot in test/draft mode?			
Can it link to a human route and capture only the data you need?			
Can you control team access and remove a former user?			
Can you export or review conversation records appropriately?			
Do its data, retention and support arrangements fit your needs?			
Current cost, usage limit and billing owner			
Official documentation checked on			

Check	Option A	Option B	Option C
Decision and reason			

A polished demo does not prove that a platform is suitable for sensitive data, business continuity or a complex integration. If you cannot understand a material setting, pause and ask the provider, your website specialist or an appropriate adviser.

Afternoon: setup and website connection SOP

SOP name: Create a controlled chatbot test installation

Owner: Website administrator, with the chatbot administrator

Trigger: The business owner has approved the Day 1 purpose and the platform decision.

Inputs: Approved purpose, business contact details, approved brand assets, website administrator access, provider's official installation instructions.

Output: A chatbot visible only in the intended test location, with one named administrator and a rollback method.

Human fallback: If access, data terms, installation instructions or a security setting is unclear, stop. Use the existing contact page and obtain help before continuing.

1. Create the account using a business-controlled email address. Record the billing owner and account owner in a secure business record.
2. Add only the people who need access. Give each person their own account where the service allows it; do not share a password.
3. Enable the platform's available sign-in protection and recoverability options. Store recovery details securely and agree who may use them.
4. Enter the business name, contact route and approved links. Do not invent a persona or claim that the chatbot is a human colleague.
5. Choose a simple icon or approved brand asset. Make the chat window easy to read on a phone. Do not use a welcome message that blocks the page or makes an unsupported promise.
6. Set business hours only if the business can reliably maintain them. Make the after-hours message explain the available next step without promising a response time you cannot meet.
7. Find the provider's official installation or integration instructions for your own website platform. This may use a recognised plugin, an approved widget setting or a code snippet. Give the website administrator the exact official guide rather than copying code from an unverified forum.
8. Install on a staging, preview or limited test page first where possible. If that is not possible, use the provider's test/draft mode and a discreet page.
9. Visit the test page in a private/incognito browser window and on a mobile device. Confirm that the widget appears, opens and can be closed.

10. Record how to disable or remove the widget. The website administrator should be able to do this without waiting for a supplier.

If the widget does not appear: check that the official installation steps were completed for the correct website and published pages; check for browser extensions that block chat widgets; then ask the website administrator to inspect the site. Do not repeatedly paste code into unrelated site areas.

Evening: build one simple, complete path

Use the easiest approved question first. A full path includes the trigger, a checked answer, a next option and an escape route. Do not start with an open-ended AI answer that has no approved material behind it.

Example pattern — replace all wording with your own approved information:

Element	Example pattern
Intent	"What are your opening hours?"
Variations	"When are you open?", "Saturday hours", "What time do you close?"
Answer	"Our current opening hours are [approved hours]."
Next choices	"Get directions", "Contact us", "Ask another question"
If not understood	"I may not have understood. Choose a topic below or contact [route]."
Escalate when	The answer is not in the approved source or the visitor needs an exception

Day 2 check-out

- ☐ Platform comparison completed using current official information.
- ☐ Business account owner, billing owner and administrators named.
- ☐ Access and recovery arrangements recorded securely.
- ☐ Widget connected in a controlled test environment or test mode.
- ☐ One complete, approved conversation path works on desktop and mobile.
- ☐ A person knows how to disable the widget.

Day 3 — Build the knowledge, handover and safe boundaries

Morning: turn maps into concise approved answers

Build the high-frequency basics first. A sensible order is:

1. business contact details, opening times and service areas;
2. approved service or product information;
3. published pricing guidance or a route to a quotation, if suitable;
4. existing policies, such as cancellation or delivery information; and
5. booking or enquiry steps.

Keep each answer short enough to scan. Use the pattern below, but omit any part that would make the answer less clear.

Greeting (optional) + direct answer + useful context + next step

Answer card

Field	Your approved answer
Customer question	_____
Source URL/document and last checked date	_____
Direct answer (one to three sentences)	_____
Helpful link/button	_____
Other likely question	_____
Do not answer / handover condition	_____
Content-owner approval	Name: ____ Date: ____

Do not write a static answer for something that changes throughout the day, such as live stock, engineer availability or a personalised quote, unless there is a controlled, tested source for it. It is usually safer to explain how the visitor can check or request an answer from a person.

Afternoon: design lead capture with a clear purpose

Lead capture is optional. If you use it, ask only for what is needed for the next step. An early enquiry normally needs less information than a full customer onboarding form.

A simple enquiry path

1. Explain why you are asking for the information: for example, “If you would like a callback about commercial cleaning, we can pass your enquiry to our team.”
2. Ask for the minimum details needed to route it, such as name, preferred contact method and a short description of the request.
3. Give a visible link to the relevant privacy information.
4. Avoid asking for payment details, account credentials, health information, identity documents or any other information that is not needed for the stated step.
5. Send the enquiry only to the agreed destination, such as a monitored shared mailbox or CRM queue. Test that destination before launch.
6. State the next step truthfully. Use “Our team will review your enquiry” rather than a response-time promise unless the business can reliably meet it.
7. Give the visitor an alternative contact route if the form fails or they do not want to use chat.

Lead-capture decision record

Question	Decision
What is the useful next step for this visitor?	_____
What is the minimum data needed for that step?	_____
Where does each field go?	_____
Who can see it?	_____
Who checks the destination and when?	_____
Privacy information/link checked by	_____
What happens if the handover fails?	_____
Is promotional follow-up intended? If yes, what checks are needed?	_____

Evening: make uncertainty visible and provide a human route

No first chatbot will cover every wording or situation. A fallback should be helpful, not pretend certainty.

General fallback wording pattern:

“I may not have understood that. You can choose one of these topics, try another wording, or contact [human route].”

Set a clear human escalation for situations such as:

- a complaint, cancellation dispute, refund request or a request for compensation;
- language showing urgency, immediate risk or a safeguarding concern;
- a request for advice outside the business’s approved scope;
- an answer that requires a bespoke quotation, exception or professional judgement;
- uncertainty after one or two attempts; and
- an explicitly requested human conversation.

A chatbot must not turn an urgent matter into a queue without telling the visitor what to do. Use the business’s own approved urgent-contact instructions. If your business is not equipped to receive urgent requests, say so plainly.

SOP name: Handle chatbot escalation

Owner: Named human responder

Trigger: The chatbot detects an escalation phrase, cannot answer from approved content, or the visitor selects “Speak to a person”.

Inputs: Conversation context limited to what the responder needs, the visitor’s contact details only if provided, and the approved escalation category.

Output: A human response, an alternative contact route, or a clearly recorded no-action decision.

Exception/human fallback: If the named responder is unavailable, use the approved after-hours message or existing contact route. Do not fabricate availability or allow the bot to make a commitment.

1. Confirm that the escalation queue, mailbox or task list is monitored by the named person.
2. Test each escalation category with a dummy message.
3. Make the bot’s message clear about what will happen next and what it cannot do.
4. For a complaint or sensitive matter, direct the conversation to the business’s existing process rather than writing a new policy in the chatbot.
5. Record recurring escalation causes. They may indicate a missing answer, a poorly worded question or a topic that should remain human-only.

6. If the bot repeatedly misunderstands a topic, remove or restrict that path until it is corrected and retested.

Day 3 check-out

- ☐ At least five approved conversation paths are built.
- ☐ Each answer has a source and content-owner check.
- ☐ Lead capture, if used, is minimal, explained and tested end to end.
- ☐ A visible privacy link and alternative contact route are present where appropriate.
- ☐ Fallback messages and named human escalation paths are working.
- ☐ The chatbot does not make unsupported guarantees, diagnoses or binding commitments.

Day 4 — Test, fix and decide whether to launch

Morning: test the paths, not just the happy path

Test each conversation from a fresh browser session. Try the exact trigger, normal phrasing, a misspelling, a short reply, two questions together and an unrelated question. Confirm the mobile view as well as desktop.

Use test data. Do not ask testers to submit real customer information or confidential details merely to complete a test.

Test scenario	Expected outcome	Actual outcome	Issue	Severity	Status
Exact wording of common question	Correct approved answer and next option			Critical / Important / Later	Open / Fixed / Retest
Common variation or misspelling	Correct answer or useful clarification			Critical / Important / Later	Open / Fixed / Retest
Two questions in one message	Safe clarification or route to a person			Critical / Important / Later	Open / Fixed / Retest

Test scenario	Expected outcome	Actual outcome	Issue	Severity	Status
Unrecognised request	Helpful fallback and human route			Critical / Important / Later	Open / Fixed / Retest
Complaint/ refund/urgent wording	Appropriate escalation; no invented decision			Critical / Important / Later	Open / Fixed / Retest
Lead handover	Test enquiry reaches agreed destination			Critical / Important / Later	Open / Fixed / Retest
Mobile display and close control	Readable, usable and does not hide key page controls			Critical / Important / Later	Open / Fixed / Retest
Widget disable/ removal	Administrator can turn it off			Critical / Important / Later	Open / Fixed / Retest

Treat these as **critical** before launch: wrong or misleading information; a broken human route; misdirected lead data; a permission or privacy concern; a widget that prevents use of the site; or a bot that takes an action outside its boundary. A high average score does not compensate for a serious failure.

Afternoon: ask people who did not build it

Invite three to five people who were not involved in the setup. They can be colleagues, appropriate friends or people who understand the customer context. Give them a short task list and observe where they hesitate. They are testers, not a source of testimonials.

Example task prompts, adapted to your business:

- “Find out whether this firm serves your area.”
- “Ask how to request a consultation.”
- “Find the cancellation information.”
- “Ask a question that the chatbot should not answer.”
- “Try to contact a person after the normal office hours.”

Tester	Task	What was clear?	Where did they get stuck?	Change to make	Owner	Retest date

Evening: sort fixes and make a launch decision

Sort each finding so that work remains manageable.

Priority	Meaning	Action
Critical	Could mislead, expose data, break a key route or cause unacceptable harm	Fix and retest before launch, or do not launch
Important	Makes the experience unclear or weak for a common journey	Fix before launch where feasible; otherwise restrict the relevant path
Later	A sensible enhancement that is not needed for the defined first purpose	Put it in the improvement list with an owner and review date

Launch decision record

Decision question	Answer
Are all critical issues fixed and retested?	Yes / No
Does each first-version answer come from an approved current source?	Yes / No
Do mobile, desktop, fallback and human routes work?	Yes / No
Is the business prepared to monitor the queue and update content?	Yes / No
Is the privacy/security review proportionate to the data and platform?	Yes / No / Needs advice
Decision: launch limited version / extend testing / revise scope / stop	_____

Decision question	Answer
Business-owner name and date	_____

Stopping or narrowing the launch is a valid result. A small chatbot that can safely answer four questions is more useful than a broad one that guesses.

Day 5 — Prepare, launch and learn from real use

Morning: run the pre-launch checklist

- ☐ Final content check completed by the content owner.
- ☐ Website page, chat window, links and buttons tested on phone and desktop.
- ☐ Test enquiry reached the correct destination without unnecessary data.
- ☐ Named responder knows the escalation categories and alternative contact routes.
- ☐ After-hours wording is accurate.
- ☐ The business can disable the widget and use its normal contact route if needed.
- ☐ Administrator access is limited to the right people and reviewed.
- ☐ Current provider settings, data terms and support route have been recorded.
- ☐ Privacy information and any required cookie/analytics arrangements have been checked for the actual setup.
- ☐ Critical test issues are fixed and retested.
- ☐ Business owner has signed the launch decision above.

Consider a quiet or limited launch first. For example, show the widget on a small group of relevant pages without a prominent campaign, then review the actual conversations. This is a learning approach, not evidence that a soft launch will always reduce risk.

Afternoon: choose measures that reveal problems

Do not start with arbitrary targets. Record a baseline after launch and decide what “useful” means for your single purpose. Keep the observation window and denominator visible.

Measure	Simple definition	Why it matters	First observation period	Owner
Conversations started	Number of chat sessions started	Shows use of the entry point	_____	_____
Useful completion	Sessions that reach the defined safe outcome	Tests the purpose, not just activity	_____	_____
Human escalations	Sessions routed to a person or human route	Shows where human help is needed	_____	_____
Unanswered/ misunderstood questions	Sessions with fallback, correction or unresolved route	Identifies content gaps	_____	_____
Enquiries received	Testable, appropriate enquiries reaching the agreed destination	Checks the handover, if lead capture is used	_____	_____
Correction/review workload	Time spent checking, correcting or handling exceptions	Prevents “automation” from hiding human work	_____	_____
Technical faults	Widget, link, integration or delivery failures	Protects the basic customer route	_____	_____

A lower escalation rate is not automatically better. It can mean the bot is genuinely answering routine questions, or it can mean visitors cannot find help. Review the conversation quality and customer route, not a number in isolation.

Evening: go live using a reversible SOP

SOP name: Launch and monitor the first live chatbot

Owner: Business owner, with the chatbot administrator and human responder

Trigger: The Day 4 launch decision is approved and the pre-launch checklist is complete.

Inputs: Tested chatbot version, approved content, named monitoring schedule, disable/remove instructions and existing customer-contact route.

Output: A live limited chatbot with documented monitoring and a working fallback.

Exception/human fallback: If a critical issue appears, disable the chatbot or restrict the affected flow, use the normal contact route and notify the business owner. Do not keep a known faulty bot live to preserve a launch date.

1. Ask one person outside the build team to complete a final test using the live page.
2. Confirm the widget is shown only where you intended and that it does not obscure important page controls.
3. Send a clearly labelled test message and check the response, links, escalation and enquiry destination.
4. Announce the limited launch internally. Tell staff what the bot can answer, what it cannot answer and where escalations arrive.
5. Monitor conversations at a frequency that your team can genuinely maintain. Use the schedule below as a starting template, not a service-level promise.
6. Record unexpected questions, errors and content gaps. Make small, checked changes rather than rewriting multiple things at once.
7. Disable or restrict the chatbot promptly when a critical error, data issue or broken human route is found. Retest before re-enabling.

Monitoring schedule template

Period	What to check	Named person	What counts as an urgent issue?
First three live days	New conversations, failures, handovers and incorrect answers	_____	_____
Remainder of first week	Patterns, unanswered questions and user friction	_____	_____
Week two	Metrics, content accuracy and access/settings	_____	_____
Ongoing review	Trends, seasonal changes and platform/provider changes	_____	_____

The first week and beyond

First five live days: a practical improvement loop

Day	Focus	Specific action	Owner	Evidence/check
1	Immediate issues	Fix, restrict or disable any critical problem; log the cause	_____	_____
2	Question phrasing	Add approved wording variations for common questions	_____	_____
3	Handover	Check that test and real enquiries reach the correct person	_____	_____
4	Fallbacks	Improve the route for questions the chatbot cannot answer	_____	_____
5	Review	Review a small sample of conversations and decide one improvement	_____	_____

Do not change a response merely because one person dislikes its tone. Look for repeated confusion, a clear content error or a better way to meet the stated purpose. Keep a short change record so that you can reverse a change if it makes the experience worse.

Weekly review

Reserve a short, repeatable review. The source material suggested a 30-minute session; use more or less time as your volume and risk require.

1. Review conversation logs only in the appropriate authorised environment.
2. List unanswered, misunderstood and abandoned journeys.
3. Check whether each answer is still current. Replace stale information rather than adding a workaround.

4. Look at escalation quality: were the right matters sent to a person, and could people get help?
5. Review the handover destination and any missed or duplicate records.
6. Choose one or two changes. Name the owner, testing method and review date.
7. Check for platform, permissions or business-policy changes that could affect the bot.

Monthly review and controlled expansion

Add a new topic only when the current version is stable, the content is approved and the human process can support it. Possible next topics include seasonal arrangements, a new service, a booking explanation or a more useful internal routing step. More features are not automatically better.

Before adding an integration, appointment booking or recommendation feature, repeat the Day 1 boundary, Day 3 data/handover checks and Day 4 testing. A new connection can create new access, data and failure risks.

Proposed change	Customer problem it solves	Approved source/data needed	New risk or dependency	Test before release	Decision
					Add / Defer / Reject
					Add / Defer / Reject
					Add / Defer / Reject

Quick-reference operating checklist

Use this page without reading the full workbook when you need to check a proposed chatbot change.

Before adding or changing an answer

- ☐ Is there a real, recurring customer question behind the change?
- ☐ Does a named content owner confirm the source is current?
- ☐ Is the answer within the chatbot's approved boundary?
- ☐ Does it give a useful next step without a false promise?
- ☐ Does it say what happens when the chatbot is unsure?
- ☐ Does it avoid collecting data that is not needed?

- ☐ Has the change been tested on desktop and mobile?
- ☐ Can the previous version be restored if the change fails?

Before adding a new action or integration

- ☐ Is there a named business owner and a specific customer outcome?
- ☐ Are the inputs, permitted data and account permissions clear?
- ☐ Is a human approval step needed before an important action?
- ☐ Is there a manual fallback if the integration is unavailable or wrong?
- ☐ Have access, offboarding, logging and account ownership been considered?
- ☐ Has the provider's current official documentation been checked?
- ☐ Has the change been tested with representative safe test cases?
- ☐ Is the go-live decision recorded?

Your 5-day action plan

Write the next action, owner and date before closing this workbook. A plan is useful only if someone can act on it.

When	Action	Owner	Evidence that it is done	Date
Day 1	Define one purpose and map five conversations	_____	Approved maps and source links	_____
Day 2	Compare platforms and create a controlled test setup	_____	Decision record and one working test flow	_____
Day 3	Build core answers, handover and fallback routes	_____	Approved content and tested escalation	_____
Day 4	Run scenario and user tests; fix critical issues	_____	Test log and launch decision	_____

When	Action	Owner	Evidence that it is done	Date
Day 5	Complete launch check and start limited monitoring	_____	Monitoring record and rollback route	_____
Week 2	Review live conversations and make a measured improvement	_____	Change record and retest	_____
Month 1	Decide whether to maintain, extend, narrow or stop	_____	Named decision with evidence	_____

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References and verification notes

1. [Information Commissioner's Office — Business-to-business marketing](https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/)
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2. [Information Commissioner's Office — Electronic mail marketing](https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/guide-to-pecr/electronic-and-telephone-marketing/electronic-mail-marketing/)
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4. National Cyber Security Centre — Small organisations guide to cyber security

<https://www.ncsc.gov.uk/collection/small-organisations-guide-to-cyber-security>

The primary sources below support the UK marketing and security checkpoints in this workbook. They are not a compliance guarantee and do not support performance, growth, response-time or conversion claims; such claims have been deliberately excluded.

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