



ASCENDEA

AI / BUSINESS GROWTH / PROMPT PACK

Build an Automated Sales Chatbot — Responsible Prompt Workbook

A UK-focused planning and prompt workbook for small-business owners building a supervised sales chatbot. It covers conversation mapping, copy, platform setup, qualification, human handover, ethical follow-up, measurement and a beginner operating SOP.



Author: Rob Arnold

ascendea.ai

Your route through this resource

Before you begin	3
Prompt-use rules	5
Part 1: Strategic foundation and process mapping.....	6
Part 2: Conversation design and copy.....	8
Part 3: Platform setup and operational controls	11
Part 4: Qualification, segmentation and booking	13
Part 5: Follow-up, handover and ethical conversion support.....	15
Part 6: Measurement, testing and improvement.....	18
Beginner operating SOP: build, launch and run the first flow	20
Suggested working plan	21
Pre-launch checklist	22
UK outreach and privacy note	23
Your launch decision.....	23
Publication and use notice.....	24
References	24

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

Author: Rob Arnold · Ascendea · Edition v1.0 · October 2026

<https://ascendea.ai/>

Educational guidance; not a guarantee of business results or legal, tax or personalised financial advice. This is a non-exclusive licensed-content adaptation. For your own learning and permitted end use only; no resale, redistribution, editable-source or private-label rights are granted.

A practical planning and prompt pack for UK small businesses

Author: Rob Arnold · Ascendea · ascendea.ai

Editorial and PDF QA v1.1 · October 2026 · Conditional release review

A sales chatbot can give people a prompt acknowledgement, answer straightforward questions and direct suitable enquiries to the right person. It should not pretend to be a person, make promises it cannot keep, or remove human judgement from meaningful sales decisions. This workbook helps you plan a small, supervised first version before you pay for software or publish an automated flow.

Start with a narrow job: for example, a Leeds heating engineer's website chat can capture the postcode, type of heating issue and preferred contact time, then place uncertain or urgent cases in a human queue. A B2B accountant can answer approved questions about services and collect a request for a call. A retailer can help a shopper find an in-stock product, but should not invent availability or delivery dates.

The prompts in this workbook are drafting tools. An AI assistant can produce a useful first draft, but it does not know your business facts, your legal duties, a customer's circumstances or whether its output is accurate. Give it approved, non-confidential inputs. Check every claim, price, policy, testimonial, timing and automation rule before use. Keep a person responsible for the chatbot.

Before you begin

What a sensible first chatbot does

Choose one customer-facing task with a clear owner, a limited set of inputs and a manual alternative. Suitable first tasks include:

- routing an enquiry to the appropriate team;
- answering a small set of approved FAQs;
- collecting details for a call-back request;
- helping a customer navigate an approved product range; or
- preparing an internal draft for a team member to review.

Avoid starting with a bot that sends binding quotes, gives regulated, legal, medical or financial advice, decides eligibility, handles complaints without escalation, takes consequential action in another system, or makes a firm booking without an agreed human fallback. A chatbot is not automatically safe merely because it is short or uses a familiar channel.

The safe-input rule

Before pasting anything into an AI assistant or chatbot platform, ask:

1. **Is it necessary?** Remove customer names, phone numbers, addresses, order numbers, payment information and sensitive details unless you have an approved, documented reason and platform arrangement.
2. **Is it accurate and approved?** Use your current price list, terms, opening hours, availability and service boundaries—not memory or old marketing copy.
3. **Can the tool and user see it?** Do not paste passwords, API keys, account recovery codes, internal credentials or confidential documents into prompts.
4. **Who checks the output?** Name the person who can approve wording, correct an error and switch the automation off.

If you process personal data, decide the purpose, lawful basis, privacy information, retention and access arrangements before launch. A data protection impact assessment (DPIA) is required where processing is likely to result in high risk to individuals; if you are unsure, assess the risk and obtain appropriate advice before proceeding.¹ ICO AI guidance is currently under review following the Data (Use and Access) Act, so recheck it when you implement.²

Your one-page chatbot brief

Complete this before using the prompts. It turns a vague idea into a buildable and reviewable job.

Decision	Your working answer
Customer task	
Channel and entry point	
What the chatbot may do	
What it must never do	
Approved information it may use	
Information it must not request or retain	

Decision	Your working answer
Human owner and handover route	
Manual fallback if the platform fails	
Evidence that the first version is helping	
Review date	

A simple build sequence for beginners

1. **Map the existing conversation.** Collect real, representative questions and answers. Remove personal data. Mark where a person must take over.
2. **Write the smallest happy path.** One entry point, one customer goal, a few choices and a clear exit to a person are enough for a first release.
3. **Choose the channel after the plan.** Start where customers already contact you and where you can maintain the flow. Check the platform's current terms, costs, message policies, data terms and accessibility before committing.
4. **Set ownership and security.** Use a business-owned account, individual staff access, multi-factor authentication (MFA) where available, a record of administrators and the least access each person needs. Review access when someone changes role. NCSC guidance recommends managing privileged users, least privilege and logging/monitoring privileged access in SaaS services.³
5. **Build in a controlled environment.** Enter only approved copy. Configure clear tags, notifications and an off switch. Keep the first version internal or supervised where possible.
6. **Test before customers see it.** Use permitted test cases covering ordinary questions, missing information, typos, abusive messages, requests outside scope and platform failure. Test links, buttons, notifications and handover.
7. **Release to a small, agreed audience.** Do not automatically send a high volume of follow-ups or outreach. Monitor actual conversations and stop the flow if it is misleading, unsafe or malfunctioning.
8. **Review weekly.** Read a sample of conversations, correct the most important failure and retest any changed branch. Record what changed and why.

Prompt-use rules

Copy a prompt into your chosen AI assistant, replace every item in square brackets and attach only approved material. Ask it to state assumptions rather than invent facts. Then have a named person review the draft against your website, price list, policies and real customer conversations.

Use this **standard instruction** at the end of every prompt in this workbook:

Use only the information I supply. If information is missing, ask a concise question or mark it as an assumption. Do not invent prices, availability, customer results, policies, legal claims, testimonials or competitor facts. Write in plain UK English. Flag any statement that needs human approval. Provide a human-handover route and a manual fallback for unclear, urgent, sensitive or out-of-scope requests.

Part 1: Strategic foundation and process mapping

Prompt 1: Extract your current sales conversation

Purpose: turn what your team already does into a documented flow before automating it.

Act as a sales-process interviewer for a small UK business. Ask me one question at a time, then wait for my answer. Build a factual outline of our current enquiry-to-sale process.

Business and offer: []

Typical customer: []

Usual price range or quote process: []

People who currently handle enquiries: []

Ask about: common first questions; information genuinely needed to decide the next step; objections; steps from first contact to sale; signs a customer is ready; points where a person must take over; and situations where we should decline or refer the enquiry.

At the end, produce: (1) stages and owner, (2) inputs and outputs at each stage, (3) approved answers needed, (4) human-handover triggers, (5) manual fallback, and (6) facts we still need to verify.

[Add the standard instruction.]

Human check: make sure the outline describes the real process, not the process you wish you had. Remove any question that is merely curious rather than needed for the next step.

Prompt 2: Map the customer journey as a hypothesis

Purpose: identify likely questions and friction without pretending you know every customer's motivation.

Help me create a working customer-journey map for this business.

Business, audience and offer: []

Evidence we have (call notes, FAQs, surveys, search terms or staff observations):
[]

What is assumption rather than evidence: []

Create stages from first awareness to a suitable next action. For each stage show: customer goal, likely question, evidence or assumption, friction, approved help the chatbot can provide, and a human escalation route. Do not assign emotional states as facts unless I provide evidence. End with three questions we should ask real customers to validate the map.

[Add the standard instruction.]

Example: a Bristol commercial-cleaning company may find that office managers first ask about service area, contract flexibility and insurance. Do not assume price is the only concern until conversations support it.

Prompt 3: Build helpful qualifying questions

Purpose: guide an enquiry to the right next step without an interrogation.

Design 5–7 short, optional-or-explainable questions that help our team route an enquiry fairly.

Business and ideal customer: []

Service area or delivery limits: []

What we need to know before proposing a next step: []

Genuine deal-breakers or referrals: []

Information we must not collect in chat: []

For each question provide: plain wording, 2–4 appropriate choices plus “I’m not sure”, why it is necessary, tag to apply, and what happens next. Put the least intrusive questions first. Do not make a final eligibility, credit, employment, health or legal decision. Provide a polite human route where the answer is unclear or outside our offer.

[Add the standard instruction.]

Prompt 4: Clarify the value proposition

Purpose: create concise, accurate chat copy—not a grand claim.

Turn the approved information below into clear mobile chat copy.

Current description: []

Verified customer benefit: []
 How our service works: []
 What makes our approach different, with evidence: []
 Limits or important conditions: []

Write: (1) one factual opening sentence, (2) three “You can...” benefit bullets, (3) one self-selection question, and (4) a short clarification of any limit or dependency. Avoid superlatives, unverified comparisons, guaranteed outcomes and jargon. Keep each chat message below 20 words where possible.

[Add the standard instruction.]

Prompt 5: Compare alternatives honestly

Purpose: prepare useful differentiation without asserting facts about competitors that you cannot evidence.

Help us identify honest ways to explain our approach alongside alternatives.

Customer problem: []
 Alternatives customers mention (including doing nothing or doing it in-house): []
 Verified strengths of our offer: []
 Verified boundaries or trade-offs: []
 Public competitor information we can cite, if any: []

Create: likely comparison questions; neutral answers; questions the chatbot can ask to understand fit; and wording that says “we may be a fit if...” rather than attacking a competitor. Separate verified facts from assumptions. Do not claim a competitor’s weakness without a reliable public source.

[Add the standard instruction.]

Part 2: Conversation design and copy

Prompt 6: Write a Hook–Value–Ask opening

Purpose: make the first reply relevant to what the person just did.

Create an opening sequence for this specific entry point.

Entry point: [website enquiry / QR code / WhatsApp click / other]
 What the visitor just did: []
 What they were promised or expect: []
 Approved information or resource to offer: []
 Next useful choice: []
 Human support route: []

Write three short messages: Hook (acknowledge context), Value (give the promised help) and Ask (a simple, optional choice). Give 2–3 button labels, including “Speak to a person” or equivalent. Do not imply an immediate human reply outside our stated hours. Keep each message concise and accessible on a phone.

[Add the standard instruction.]

Prompt 7: Create a bot voice guide

Purpose: make the chatbot recognisable, respectful and easy to understand.

Create a practical bot voice guide for this UK small business.

Brand character: []

Audience and accessibility needs: []

Words or tone to avoid: []

Channels used: []

Handover wording and business hours: []

Provide: a bot name only if useful (do not imply it is human); five voice traits with examples; formality, punctuation and emoji guidance; ten do/don’t rules; approved phrases; and three before/after rewrites. Include rules for admitting uncertainty, correcting an error and handing off to a person.

[Add the standard instruction.]

Prompt 8: Build an objection–response library

Purpose: respond calmly, truthfully and without pressuring someone.

Create short response options for the objections below.

Approved offers, pricing basis and policies: []

Common objections: []

What we can offer as an alternative: []

Matters that must go to a person: []

For each objection, write IF the person says [example], THEN: (1) acknowledge without being defensive, (2) give one approved clarification, (3) offer a low-pressure next choice, and (4) provide a human route. Keep each response under 45 words. Do not use false urgency, unsupported savings claims or pressure language.

[Add the standard instruction.]

Prompt 9: Make messages mobile-friendly

Purpose: improve readability, not hide important terms.

Edit these approved chatbot messages for phone reading: [paste messages]

For each message, show original, revised version and reason. Aim for one idea per bubble, plain language, meaningful buttons and short sentences. Break long explanations into a brief answer plus a “More detail” link or human route. Preserve material price, policy, consent or safety information; do not shorten it away. Suggest optional images only where they add real clarity, and provide descriptive alt text for each.

[Add the standard instruction.]

Prompt 10: Plan a proportionate next-step ladder

Purpose: move from information to an appropriate action, with a genuine no-pressure path.

Design a five-step customer-choice ladder for this goal: [request a quote / book a call / buy an item / other].

Offer and decision process: []

What the customer needs to know before deciding: []

What data each step requires: []

Alternative path for “not now”: []

For each step, provide the ask, purpose, button labels, data collected, next action for yes/no/unsure, and human handover. The steps must earn the next question rather than force it. Do not treat consent to messages as a condition of receiving a basic answer unless it is genuinely necessary and lawful.

[Add the standard instruction.]

Prompt 11: Turn FAQs into a safe decision tree

Purpose: give short approved answers and make it easy to escape the menu.

Create a text decision tree from these approved FAQs: [paste FAQs and verified answers].

Group them into 3–5 plain-language topics. For every answer, provide a concise answer, a link placeholder for the authoritative policy or page, a relevant next question and a “None of these / speak to a person” route. Mark answers that must be checked live, such as stock, appointments, delivery, pricing or individual account details. Do not let the chatbot guess.

[Add the standard instruction.]

Prompt 12: Tailor opening scripts by entry point

Purpose: avoid the same generic greeting everywhere.

Create an opening for each entry point below.

1. []
2. []
3. []
4. []

For each, state: what the person has just done; the first message; any resource delivered immediately; the first useful question; 2–3 button choices; consent or disclosure wording where needed; and the human route. Do not claim to know the person's identity, intent or previous actions beyond the entry-point evidence.

[Add the standard instruction.]

Part 3: Platform setup and operational controls

Prompt 13: Select a channel, not a miracle tool

Purpose: compare options against your real customers and ability to operate them.

Create a channel-selection comparison for this small business.

Business type and offer: []

Where customers currently contact us: []

Customer needs and accessibility considerations: []

Primary task: []

Team skill and available time: []

Budget range, excluding unknown usage costs: []

Systems that may need connecting: []

Recommend a sensible first channel and up to two alternatives. For each, compare customer fit, setup effort, ownership, integration needs, messaging/policy constraints, privacy and data questions, ongoing workload, likely costs to verify, and a manual fallback. Do not name a platform as “best” without explaining the trade-offs. Include a checklist of current official documentation we must read before purchase.

[Add the standard instruction.]

Prompt 14: Plan a WhatsApp customer-service-window flow

Purpose: use the source topic carefully and only where WhatsApp Business Platform is genuinely your chosen channel.

Design a compliant, helpful WhatsApp Business Platform conversation plan.

Customer opt-in method and record: []

Customer task: []

Business hours and human cover: []

Approved answers and links: []

Follow-up purpose: []

Create: immediate acknowledgement; a useful check-in only if it helps the customer; a route to human support; and a plan when the conversation is no longer active.

Identify which messages are service versus marketing, what consent/policy checks are needed and what should not be automated. Do not assume messages are free, permitted or deliverable: tell me to check current WhatsApp policy, template approval, pricing and quality status before enabling each message.

[Add the standard instruction.]

For the WhatsApp Business Platform, Meta states that a 24-hour customer service window starts when a user messages or calls the business and resets if they message or call again. Outside the window, only pre-approved templates can be sent; users must also have opted in to messages.⁴ This is a platform-specific rule, not a general chatbot tactic. Policies, eligibility and prices can change.

Prompt 15: Prepare for business verification without assumptions

Purpose: organise your information before you follow the instructions shown in your own account.

Create a preparation checklist for business verification in [platform].

UK business structure: [sole trader / limited company / LLP / other]

Legal business name: []

Trading name, if different: []

Registered or trading address: []

Website/domain and business contact details: []

Account owner with authority: []

List the information and records we should check for consistency, how to record the source of each detail, questions to ask if details differ, and a step-by-step process for following the platform's current verification screen. Do not assert a fixed list of acceptable documents, guaranteed approval, required phone-number change or completion time. Include an escalation step if verification is rejected.

[Add the standard instruction.]

Meta's current help says a Business Suite portfolio owner with full control can begin verification when eligible, enters legal name, address, phone and website, and may be asked for official documents if no record matches. Follow the specific account instruction rather than relying on a generic checklist.⁵

Prompt 16: Expand to more channels in stages

Purpose: add complexity only when the first channel is understood.

Create a phased expansion plan from our current channel to potential additional channels.

Current channel and task: []

What has been tested and learned: []

Conversation volume and human capacity: []

Potential new channels: []

Shared inbox/CRM arrangements: []

Set out a 90-day *illustrative planning sequence* with a decision gate before each phase. For each phase include: adaptation of scripts; consent and platform-policy checks; source tags; routing; staff training; data-sharing check; monitoring; success/failure evidence; and a rollback plan. Recommend keeping or stopping a channel based on evidence, not vanity metrics. State assumptions and do not promise growth.

[Add the standard instruction.]

Part 4: Qualification, segmentation and booking

Prompt 17: Build a fair qualification flow

Purpose: route enquiries quickly while treating unsuitable enquiries respectfully.

Build a qualification flow for this offer.

Necessary fit criteria: []

Service area or delivery constraints: []

Real capacity or timing limits: []

Questions we may ask: []

Questions we must not ask: []

Helpful alternatives or referral route: []

Order the questions from least intrusive to most important. For each, give wording, choices including "not sure", tag, next branch and a short reason. Write a respectful message for outside-scope enquiries. Do not use the flow to make a solely automated consequential decision about a person. Route exceptions, complaints,

accessibility needs and unclear cases to a person.

[Add the standard instruction.]

Prompt 18: Design a transparent lead-priority aid

Purpose: help a team decide who to contact first; it is not a decision-maker.

Create a simple, reviewable lead-priority rubric for human use.

Business and sales process: []

Signals that indicate an enquiry needs a prompt response: []

Signals that require human review rather than a score: []

Data we are allowed to use: []

Use no more than five observable, job-relevant signals. Propose three priority bands with a clear explanation, route and target response *aim* for each. Show how a staff member can override the band and record why. Do not use sensitive characteristics, inferred traits, protected characteristics, or automated decisions with significant effects. Include a monthly check for errors or unfair patterns.

[Add the standard instruction.]

Prompt 19: Create a minimal tag structure

Purpose: make follow-up manageable, not build an unmaintainable data collection system.

Design a minimal tag taxonomy for our chatbot and CRM.

Offers: []

Customer use cases: []

Customer journey stages: []

Channels: []

Data retention rule or review date: []

Include only tags needed for service or agreed follow-up: interest, readiness, source, journey stage and handover status. For each tag give its exact name, trigger, owner, permitted use, expiry/review point and how to correct it. Avoid guessing budget, personal characteristics or engagement interest. Explain which combinations are useful and which should never trigger automated marketing without the relevant permissions.

[Add the standard instruction.]

Prompt 20: Create appointment-booking logic

Purpose: offer the appropriate appointment and explain what happens next.

Create a supervised booking flow.

Appointment types, duration and eligibility: []

Calendar owner and availability source: []

Information needed before booking: []

Cancellation/rescheduling policy: []

Reminder channels and consent basis: []

What happens if no slot is suitable: []

Provide decision logic; short pre-booking questions; calendar steps; confirmation copy; preparation guidance; rescheduling route; reminder plan; no-show follow-up; and human fallback. Mark each live field the bot must retrieve rather than state from a static script. Do not take payment, promise availability or send SMS/email reminders until the tool, consent and policy arrangements have been checked.

[Add the standard instruction.]

Prompt 21: Guide product selection honestly

Purpose: help a shopper navigate a catalogue without pretending a recommendation is perfect.

Design a 3–4 question product-finder flow.

Approved catalogue, stock source and prices: []

Customer choice factors: []

Constraints, compatibility and exclusions: []

When staff advice is required: []

Start with broad categories, then use short diagnostic questions. For each result, state why it may fit based only on answers given, link to the authoritative product page, flag information that needs live checking, present one alternative and offer human help. Never fabricate social proof, availability, safety suitability or a product claim. Explain what to do when none fits.

[Add the standard instruction.]

Part 5: Follow-up, handover and ethical conversion support

Prompt 22: Design a respectful incomplete-purchase follow-up

Purpose: help someone resume a task, not harass them.

Create a conservative follow-up plan for an incomplete purchase or quote request.

Channel and platform rules: []

Consent/permission and opt-out method: []

What the person did: []

Known legitimate help (for example, checkout error support): []

Actual offer or deadline, if any: []

Write one immediate support message and up to two later messages only where lawful, permitted and useful. For each give trigger, wording, buttons, suppress/stop rule, tags and human route. Include an A/B-test idea only if volume and consent make it appropriate. Do not imply a technical error without evidence, use fake scarcity, or message outside platform rules.

[Add the standard instruction.]

Prompt 23: Suggest a helpful post-purchase next step

Purpose: support a customer after they buy, before considering an additional offer.

Create a post-purchase message flow for this verified purchase.

Primary purchase and fulfilment steps: []

Genuinely complementary option, if any: []

Eligibility, stock and pricing source: []

Customer service route: []

Start with confirmation and practical next steps. Only then offer one genuinely relevant optional addition, with transparent price and no pressure. Provide accept, decline and “ask a question” options. If the person declines, stop promotional suggestions. Do not claim “people also buy” or use social proof unless it is verified and permitted.

[Add the standard instruction.]

Prompt 24: Write a high-value human-handover SOP

Purpose: make a handover feel useful and give staff enough context.

Create a beginner-friendly SOP for human handover.

Handover triggers (for example complex scope, complaint, high-value enquiry, urgency): []

Team roles and cover hours: []

Notification channel: []

Approved customer data to include: []

Fallback if no one is available: []

Write numbered steps with: Owner; Trigger; Input; Action; Output; expected response aim; and exception/fallback. Include the customer transition message, staff alert template, human opening message and a way for staff to correct the bot's summary. Do not promise a response time the team cannot meet. Keep the full conversation accessible to the authorised human rather than relying only on AI summarisation.

[Add the standard instruction.]

Prompt 25: Explain payment choices transparently

Purpose: present approved options clearly, not engineer pressure around affordability.

Create a payment-options explanation for a customer chat.

Standard price and whether VAT is included: []

Approved payment methods and provider: []

Approved instalment or third-party finance option, if any: []

Terms, total amount payable, fees and eligibility source: []

Lower-cost alternative or defer route: []

Write factual copy that shows the total and relevant conditions clearly. Give a neutral question that lets the customer choose to speak to a person. Do not give personal financial advice, compare a payment to everyday spending, hide fees, or imply approval. If credit or regulated finance may be involved, flag it for specialist legal/compliance review before use.

[Add the standard instruction.]

Prompt 26: Use only real scarcity or deadlines

Purpose: explain a genuine limit without manipulation.

Review whether these proposed urgency messages are truthful and appropriate.

Actual verifiable constraint: [appointment capacity / stock count / published promotion end]

Evidence source and update method: []

Who owns the accuracy check: []

Proposed messages: []

For each message, label it publish / revise / do not use. Write a factual replacement where needed. Include the source that must update any displayed count or deadline, an expiry rule, and a human fallback if the live data is unavailable. Reject fake countdowns, invented demand, permanently repeating "last chance" promotions and any statement that cannot be checked.

[Add the standard instruction.]

Prompt 27: Use evidence-based social proof

Purpose: build trust with permission and context, not invented popularity.

Create a careful social-proof plan from the evidence below.

Approved reviews/testimonials and permission status: []

Approved case-study facts and context: []

Certifications/memberships with current status: []

Client logos with permission: []

For each usable item, write exact attributed wording, where it may appear in the conversation, the customer question it helps answer and the evidence/permission record to retain. State what cannot be used. Do not write a composite testimonial, quote an average result as universal, use a client logo without permission or imply endorsement.

[Add the standard instruction.]

Part 6: Measurement, testing and improvement

Prompt 28: Build a practical dashboard

Purpose: look at service quality and the business process—not just chat volume.

Design a small weekly dashboard for this chatbot.

Primary customer task: []

Desired next action: []

Available data sources: []

Known limitations of the data: []

Owner who will review it: []

Propose one primary outcome measure and 5–7 supporting measures. For each give plain definition, numerator, denominator, source, review cadence, likely interpretation and an action question. Include: conversations started; completed journeys; human handovers; successful next actions; errors/unclear requests; time to human response; and opt-outs or negative feedback where relevant. Avoid claiming an industry benchmark or treating correlation as proof of sales impact. Distinguish a booking, a quote and a completed sale.

[Add the standard instruction.]

Prompt 29: Plan one controlled test at a time

Purpose: change a specific element, observe it and protect customers.

Create a one-change-at-a-time chatbot test plan.

Problem observed: []

Current wording/flow: []

Proposed change: []

Available conversation volume: []

Safety or compliance constraints: []

Write: hypothesis; primary and guardrail measures; who approves the change; version label; audience allocation approach; stop conditions; review date; and decision rule. If volume is too low for a meaningful comparison, recommend qualitative review and representative test cases instead of false statistical certainty. Never test a version that omits a required disclosure, makes a misleading claim or removes an essential human route.

[Add the standard instruction.]

Prompt 30: Audit the flow weekly

Purpose: find a real problem, fix it and retest it.

Turn this chatbot description into a weekly yes/no audit with actions.

Chatbot scope: []

Recent issues or customer feedback: []

Key integrations: []

Human owners: []

Organise checks under: Conversation health; Copy and accessibility; Technical operation; Business rules; Privacy/security; and Human handover. For every failed check give owner, severity, immediate containment action, correction, test required before release and review date. Include an off-switch check and a check that no branch ends without a useful next option.

[Add the standard instruction.]

Prompt 31: Collect feedback with minimum friction

Purpose: learn where help is failing without turning every chat into a survey.

Design a lightweight feedback process.

Customer task: []

When the interaction is complete: []

Questions we genuinely need answered: []

Approved human escalation route: []

Data retention/review rule: []

Create a one- or two-question optional end-of-chat survey, short check-in points, wording that detects possible frustration without assuming it, a human handover trigger and a weekly review process. Explain how feedback becomes a logged improvement action. Do not condition service on feedback, collect unnecessary personal data, use an incentive without checking its terms, or obscure an opt-out.

[Add the standard instruction.]

Beginner operating SOP: build, launch and run the first flow

Purpose

Build one supervised chatbot journey that provides approved information or captures a next step, then review it regularly.

SOP item	Definition
Owner	[Name/role accountable for content and operation]
Trigger	A customer starts the chosen website, WhatsApp or other channel journey
Inputs	Approved copy, current policy/price/availability source, test cases, routing rules
Output	A correctly routed enquiry, approved answer or clear human handover
Exception / human fallback	Unclear, urgent, sensitive, complaint, out-of-scope, inaccessible or failed-platform case goes to [route]

Steps

1. **Approve the scope.** The owner signs off the one-page chatbot brief and names the human team members who receive handovers.
2. **Prepare approved content.** Put FAQs, prices, policies, links and service boundaries in one dated source. Do not use unverified AI-generated facts as the source of truth.
3. **Create business-controlled access.** The business, not a departing freelancer's personal account, should control the platform, billing and key integrations. Give each person their own login where the platform supports it. Turn on MFA where available and record administrators.
4. **Configure only essential permissions.** Connect the calendar, CRM or inbox only if that connection is necessary. Limit access by role. Do not put credentials in prompts, scripts or shared chat transcripts. Review administrator access and activity logs.
5. **Build one path.** Add the contextual greeting, approved choices, tags, a human option and a manual fallback. Make it clear when the customer is interacting with automated assistance.
6. **Test with a checklist.** At minimum test: ordinary request; spelling mistake; no-answer; out-of-hours request; sensitive or complaint-like request; broken link; unavailable calendar slot; handover; and failure of an integration. Record the expected and actual result.
7. **Resolve failures.** If the bot invents an answer, sends data to the wrong place, cannot hand over, or makes an unsafe promise, do not launch that branch. Correct it and retest.
8. **Launch narrowly.** Start with one entry point or a limited audience. Check the inbox/alerts at the cover level you have stated to customers. Do not promise instant human help if nobody is monitoring it.
9. **Review and change control.** Each week, review a representative sample, feedback, handovers, errors and opt-outs. Version each material change. Retest the changed branch and retain the previous version so you can roll back.
10. **Pause or stop when needed.** Switch the automation off and use the manual process if a system is unavailable, advice is wrong, data is exposed, a policy issue is discovered or human cover is absent.

Suggested working plan

This sequence is a **planning aid**, not a fixed four-week launch promise. Allow more time for content approval, staff training, platform verification, privacy/security review or integrations.

Stage	Work to complete	Decision before moving on
1. Foundation	Prompts 1–5; chatbot brief; source of approved information	Is there a narrow, useful customer task and a human owner?

Stage	Work to complete	Decision before moving on
2. Conversation	Prompts 6–12; first written flow; handover wording	Can a customer understand the task and reach a person?
3. Setup	Prompts 13–16; channel, security and platform checks	Can the business operate this channel safely and lawfully?
4. Routing	Prompts 17–21; tags, booking/ product logic and fallback	Does every branch have a fair, reviewable next action?
5. Follow-up	Prompts 22–27; approved follow-up, payment and evidence rules	Are messages truthful, permitted and optional where required?
6. Improve	Prompts 28–31; baseline dashboard, audit and feedback routine	Is there evidence for the next specific improvement?

Pre-launch checklist

- ☐ The business task, boundaries and owner are written down.
- ☐ Every customer-facing fact comes from a dated approved source.
- ☐ The bot says or makes clear that it is automated where appropriate.
- ☐ Every path has an accessible human route and an out-of-hours explanation.
- ☐ The bot cannot send binding quotes, make consequential decisions or access unnecessary systems.
- ☐ Live availability, stock, pricing and booking information is retrieved or clearly marked for confirmation.
- ☐ Tags have a purpose, owner and review/retention point.
- ☐ Customer data is minimised; privacy, consent and retention arrangements have been reviewed.
- ☐ The chosen outreach/follow-up method has been checked against current platform rules and UK requirements.
- ☐ Business-controlled accounts, individual access, MFA and administrator review are in place.
- ☐ Test cases, including error and human-handover cases, have been passed.
- ☐ The business can pause the flow and return to a manual route immediately.

UK outreach and privacy note

A chatbot conversation started by a customer is different from sending unsolicited marketing. Before using email, texts, social direct messages or follow-up templates for marketing, check the recipient type, your permission route and the current rules. ICO guidance says PECR's electronic-mail rule does not apply to corporate subscribers, but does apply to sole traders and some partnerships, which are treated as individual subscribers; UK GDPR can still apply when you process personal data. Corporate electronic marketing must not conceal identity and should offer a valid opt-out route.⁶

Do not infer that a publicly visible contact detail is permission for any campaign. Keep a suppression list, respect objections and recheck current ICO guidance before launch. This workbook is general business education, not legal advice.

Your launch decision

Use this final record after testing. If any answer is “no” or “not sure”, keep the flow in testing or seek the appropriate help.

Question	Answer and evidence	Owner / due date
Is the customer task useful and bounded?		
Are copy, claims, prices and policies approved?		
Is the human route covered during stated hours?		
Have privacy, platform and outreach checks been made?		
Have access, MFA and emergency pause arrangements been tested?		
Have representative and failure cases been tested?		
What limitation will we explain to customers?		
Launch / hold / revise decision		

Publication and use notice

Author of this Ascendea edition: **Rob Arnold**. Publisher: **Ascendea**. Website: <https://ascendea.ai/>.

This edition adapts private source material with UK-focused editorial guidance, safer prompt inputs, practical operating controls and original worked examples. The private source-acquisition record verifies the native source member and records the licensed Entrepedia account, published PLR rebrand/giveaway permissions and curated UK SME permitted-use basis. Use remains narrow: own learning and permitted end use only, with no resale, redistribution, private labelling or editable-source sharing. This edition does not claim exclusive authorship or a standalone certificate/exception. This finished edition is available as a free Ascendea resource. It is general education only, not legal, tax, financial, data-protection, security or other professional advice. Platform features, policies, prices and UK guidance change; check the official source and obtain suitable advice for your circumstances.

For the permitted end use recorded above. **Do not resell, redistribute, private-label or share an editable version.** This finished edition is available as a free Ascendea resource.

References

1. [ICO: When do we need to do a DPIA?](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/accountability-and-governance/data-protection-impact-assessments-dpias/when-do-we-need-to-do-a-dpia/)

<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/accountability-and-governance/data-protection-impact-assessments-dpias/when-do-we-need-to-do-a-dpia/>

2. [ICO: Guidance on AI and data protection](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/)

<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/>

3. [NCSC: Using Software as a Service securely](https://www.ncsc.gov.uk/collection/cloud/using-cloud-services-securely/using-saas-securely)

<https://www.ncsc.gov.uk/collection/cloud/using-cloud-services-securely/using-saas-securely>

4. [Meta for Developers: WhatsApp service messages](https://developers.facebook.com/documentation/business-messaging/whatsapp/messages/send-messages)

<https://developers.facebook.com/documentation/business-messaging/whatsapp/messages/send-messages>

5. [Meta Business Help Centre: How to verify your business in Meta Business Suite](https://www.facebook.com/business/help/2058515294227817)

<https://www.facebook.com/business/help/2058515294227817>

6. [ICO: Business-to-business marketing](https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/)

<https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/>