



ASCENDEA

AI / BUSINESS GROWTH / GUIDE & WORKBOOK

Website Chatbot Conversation Flow Builder

A beginner-friendly, platform-neutral practical guide and workbook for UK small businesses to scope, map, write, test and improve one safe website chatbot conversation flow, with privacy, human-handoff and security safeguards.



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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 guide and workbook for UK small businesses

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A useful website chatbot does one clear job well. It gives visitors a straightforward route to an answer, a booking, a product choice or a human colleague. It should not pretend to be a person, make promises it cannot keep or become the only way a customer can get help.

This guide helps a small business design, test and improve one focused conversation flow. It is deliberately platform-neutral: use the steps whether your chatbot uses buttons, forms, live-chat routing or an AI-assisted answer feature. Start with the customer problem and your operating process; choose software only after you know what must happen.

Who this is for

This workbook is for UK owners and managers of small businesses who receive repeat website questions. It is suited to a local trades business, retailer, professional practice, B2B supplier or service firm. You do not need to code to complete the planning work.

Use it when you want a chatbot to help with one of these tasks:

- answering stable, approved FAQs;
- routing an enquiry to the right person or team;
- taking a request to book an appointment;
- helping a shopper find an approved product option; or
- collecting a small amount of information before a colleague follows up.

Do not use a first chatbot flow to give legal, medical, financial or other regulated advice; decide eligibility; set a bespoke price; make binding promises; or take another consequential action without suitable specialist design, authority and human oversight.

Before you begin: set a safe boundary

Write this before you build anything. A narrow boundary is easier to explain, test and maintain than an assistant that claims to answer every question.

Planning prompt	Your answer
The single customer problem this flow will help with	
The desired outcome for the visitor	
The one outcome for the business	
Information the chatbot may use	
Information it must not request or expose	
Actions it may take	
Actions it must never take	
Named person or team responsible for this flow	
Human handoff route and hours	
Manual fallback if the chatbot or an integration is unavailable	

Fictional example. A Manchester plumbing business uses a chatbot only to sort website enquiries into “new repair”, “planned installation” and “existing booking”. It gives approved service-area and opening-hour information. It does not diagnose a fault, quote a price, confirm an emergency response or change an existing booking. Urgent safety concerns and unclear requests are routed to a person with an appropriate message.

1. Choose a primary goal and use case

A chatbot can have several menus later, but it needs one primary job for its first release. Trying to answer every question, capture every lead and complete every sale at once makes the flow hard to test and leaves customers unsure what to do.

Review actual customer contact

Look back at a recent, representative period of customer emails, phone notes, web forms and in-store questions. Do not copy personal details into this workbook. List recurring question types and note which ones have predictable answers.

Useful early candidates are usually frequent, simple and safe to handle with approved information. A bespoke quote may be commercially important, for example, but can be too variable for an automated answer. A chatbot can still take a request and pass it to a colleague without attempting the quote itself.

Score possible starting points

Use the table to compare options. Give each factor a score from 1 (low/poor fit) to 5 (high/good fit). This is a prioritisation aid, not a promise that the highest score will produce a commercial result. If a task carries material customer, safety, privacy or regulatory risk, do not automate it merely because its score is high.

Conversati on type	Approx. weekly volume (1– 5)	Staff time per interaction (1–5)	Customer/ business importance (1–5)	Predictable and safe to standardise (1–5)	Total	Notes, evidence and risks
Opening hours and service area						
Availability or appointment request						
Product or service information						
Existing- order or existing- booking question						
Bespoke quote request						

Illustrative only. An independent flooring retailer finds that showroom-hours questions are very predictable, but a “what will my whole project cost?” question depends on measurement, materials and fitting. The first flow answers the first question and captures the second as a request for a member of the team; it does not generate a quote.

Define evidence of a useful result

Choose measures that show whether the whole customer journey is helping, not only whether someone opened the chatbot. Record a baseline where possible, the observation period and the owner who will review it.

What you need to know	Example measure	Baseline / target or learning question	Evidence source	Review owner and date
Can visitors find the right route?	Percentage reaching a clear next step		Chatbot log and test notes	
Are FAQ answers useful?	Number of repeated follow-up questions or human corrections		Support notes	
Is a booking route reliable?	Requests correctly passed to the booking process, plus failed attempts		Booking system and manual log	
Is human review manageable?	Review time and number of escalations		Staff record	
Is data collection proportionate?	Fields requested, completion and abandonment observations		Flow review	

Avoid treating engagement, collected contact details or a short test as proof of sales, savings or satisfaction. A quicker automated step can still create more work if the information is wrong or staff must correct it.

2. Map the conversation before writing messages

Map the route on paper or in a basic flowchart first. You will see missing choices and awkward handoffs before putting words into a platform.

Identify the main paths

For the first release, choose three to five routes a visitor is most likely to need. A small accountancy practice, for example, might offer:

1. I am a prospective client.
2. I am an existing client.
3. I need to book or change a meeting.
4. I have a question about services.
5. I need to contact a person.

For every route, write the beginning, the information needed, the destination and the route out if the conversation does not fit.

Flow component	Decision to make	Your design
Greeting	How will you identify the chatbot and explain its limits?	
Menu	What three to five options will a visitor see first?	
Questions	What is the minimum sequence needed to help?	
Data collection	What is genuinely necessary, and why?	
Result	What does the visitor receive or do next?	
Human handoff	Who receives the handoff and what context is passed?	
Exit	How can a visitor leave or start again without being trapped?	

Use a simple flow notation

You do not need specialist diagram software. Use these shapes consistently if you draw a map:

Shape	Meaning	Example
Rectangle	Chatbot message or action	"I can help with a booking request or a service question."
Oval	Visitor input	Visitor chooses "Book a visit".
Diamond	Decision or branch	Is the required date available?
Parallelogram	Data collection or transfer	Collect preferred contact method; pass request to the booking queue.

Here is a simple appointment-request flow. It is an example, not proof that an appointment is booked.

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Greeting → Offer "request an appointment" → Does the visitor choose it?
  Yes → Ask which service is needed → Show only verified availability or a request form
        → Collect essential details → Confirm what will happen next → End or offer more help
  No → Offer main menu or human contact route

At any stage: unclear / urgent / inaccessible / out-of-scope request → human handoff or clear alternative route

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Plan branches, not just the happy path

A natural flow allows a visitor to ask for clarification, choose another route or leave. For each main question, consider:

- **Clarification:** What if the visitor does not understand the question?
- **Variation:** What choices depend on service, location, availability or order status?
- **Objection or concern:** What if they need more information before giving contact details?
- **Exit:** What if they want to speak to someone, come back later or stop?
- **Failure:** What happens if a booking system, stock record or inbox connection is unavailable?

Do not imply availability, stock, prices, delivery times or a confirmed booking unless the relevant approved source or live system has returned that result. If the system cannot confirm it, say what it can do instead: take a request, show a contact option or invite the visitor to try again later.

3. Write clear, human messages

A chatbot should be recognisable as a chatbot. Plain language makes it easier for a visitor to decide whether the tool can help and when to ask for a person.

Build a greeting that sets expectations

A practical greeting does three things: identifies the tool, says what it can help with, and gives a clear next choice.

Less useful	Better starting pattern
"Hello! How can I help you today?"	"Hello — I'm the website assistant for [Business]. I can help with [two or three specific things], or put you in touch with our team. What would you like to do?"

Fictional example. "Hello — I'm the website assistant for Northline Kitchens. I can help you explore our kitchen ranges, request a showroom appointment or find our opening hours. For an existing order or anything urgent, I'll direct you to our team. What can I help with?"

Do not give the chatbot a human name in a way that makes a visitor think they are talking to an employee. If you use a friendly name, pair it with a clear description such as "our automated website assistant".

Use conversational structure, not informal guesswork

Write in the voice customers already recognise from your approved emails, website and service messages. A formal professional practice may be calm and precise; a family-run retailer may be warm and straightforward. In either case:

1. Keep most messages to one to three short sentences.
2. Ask one question at a time.
3. Use buttons or clearly labelled choices where they reduce ambiguity.
4. Break a complex explanation into steps and offer a link or human route for the rest.
5. Tell the visitor why a question is needed before asking for personal details.
6. Make claims only where an approved source supports them.

Collect three recent, approved customer messages. Underline words and phrases that sound like your business. Record words that should not appear, such as jargon, hard-selling language or unverified claims.

Voice element	Keep / avoid	Example approved wording
Greeting style		
Level of formality		
Typical helpful phrases		
Words to avoid		
Accessibility or language needs to support		

Build question sequences with a purpose

Start broad and move to the minimum useful detail. Every question should help the visitor receive something useful, route the request correctly or complete a stated transaction. Remove questions asked only because they might be useful later.

Example: B2B IT support enquiry flow

1. “Are you looking for ongoing IT support, help with a specific project, or support for an existing contract?”
2. “Which best describes your organisation: professional services, retail, charity, or another type of business?”
3. “What is the main issue or outcome you would like help with?”
4. “Would you prefer a call or an email reply?”
5. “To arrange that, what contact detail should we use?”

The final question should link to a visible purpose. For example: “We will use this to arrange the response you selected; see how we handle personal information in our privacy notice.” Adapt the wording to your actual process, privacy information and lawful basis.

4. Design exception handling and human handoff

The chatbot should not keep guessing when it is unsure. A respectful handoff is often more helpful than another automated message.

Prepare recovery messages

Create a message for each common misunderstanding. Give the visitor a way to rephrase, return to the menu or contact a person.

Situation	Suggested response pattern	What happens next
The answer does not match a recognised option	"I may not have understood that. Are you looking for [choice A], [choice B] or something else?"	Present short choices and human route.
The visitor wants more detail	"I can give a short overview, or I can point you to [approved page] / arrange a reply from our team."	Share source or route request.
The request is out of scope	"I cannot help with that in this chat. [Explain the appropriate contact route.]"	Transfer or display contact details.
The visitor asks for a person	"Of course. [State hours and expected route accurately.]"	Handoff, email/phone details or form.
A connected system is unavailable	"I cannot check that right now. I can take a request for the team, or you can contact us at [route]."	Never invent an answer.

Use a small number of natural variations where your platform permits it, but do not use variety to hide a repeated failure. If visitors are repeatedly reaching a fallback, review the underlying flow, question wording or knowledge source.

Define handoff triggers

Agree these triggers with the team that will receive the request. A handoff cannot be a button that leads nowhere.

Trigger	Action	Information passed	Human fallback owner
Visitor explicitly asks for a person	Offer relevant contact route or create a request	Conversation summary, if authorised and necessary	
Two failed attempts to understand the visitor	Stop repeated guessing and offer help	Last question and visitor's words, if retained	

Trigger	Action	Information passed	Human fallback owner
Complaint, distress, urgency or safety concern	Give the appropriate urgent/human route; do not attempt reassurance beyond approved wording	Minimal context needed for safe follow-up	
Bespoke, regulated or high-value request	Route to a named appropriate team	Stated need and contact preference	
Potentially sensitive personal information	Tell the visitor not to share it in chat and direct them to the approved secure route	Do not unnecessarily retain the message	

A chatbot is not an emergency service. If your business has an emergency process, state it clearly and make sure the chatbot does not claim that a chat message will receive an immediate response.

5. Collect information fairly and proportionately

Data collection should help the visitor complete the journey, not merely build a larger contact list. Ask for the minimum personal data needed for the stated purpose, and only after the visitor understands what they will receive or what will happen next. The ICO describes the UK GDPR data-minimisation principle as collecting information that is adequate, relevant and limited to what is necessary for the purpose.[1]

Design the data request

Use this sequence when a flow needs a contact detail:

1. **Give value or explain the next step.** Say what the visitor will receive, or why a colleague needs to contact them.
2. **Ask for one essential item at a time.** For example, a preferred email address may be enough to send a requested guide; do not automatically ask for telephone number, budget and job title too.
3. **Use clear, plain privacy information.** Link or point to the privacy notice at the time personal data is collected, and ensure it reflects the real data, purpose, retention, recipients and rights. The ICO says privacy information should be provided at collection and be concise, transparent, intelligible and easy to access.[2]
4. **Confirm the immediate next step truthfully.** Only say an email has been sent, a booking has been made or a colleague will call at a particular time when your system and operating process support that statement.

5. **Provide a non-data route where reasonable.** A telephone number, email address or simple contact page can help people who do not want to use the chat.

Proposed field	Why it is needed now	Essential?	Where is it stored / who sees it?	Retention and deletion rule confirmed?
First name				
Email address				
Telephone number				
Service or product interest				
Preferred contact method				
Other field				

Do not ask a visitor to put passwords, card details, health information, identity documents or other sensitive details into a general chatbot unless a suitably designed, authorised and secure process specifically requires it. In most small-business first flows, a general contact request should not need those details.

Use progressive collection only when it remains justified

It may be less intrusive to collect a name and contact route for an initial request, then ask further relevant questions later if the person chooses to continue. This does not remove your obligations to explain the processing or to keep only what is needed. Do not keep prior chat information simply to avoid asking again unless your privacy information, retention approach, access controls and platform settings support that use.

Treat follow-up marketing as a separate decision

A request for a reply, brochure or appointment is not automatically permission for unrelated ongoing marketing. If you intend to send marketing after the immediate requested service, assess the planned channel, recipient type and personal-data processing before building the automation.

For UK B2B outreach, the ICO says companies and LLPs are generally corporate subscribers, whereas sole traders and some partnerships are individual subscribers. The PECR rules for electronic mail differ, and UK GDPR can apply when identifiable business-contact data is processed. Corporate email

marketing still requires an honest identity and a valid opt-out route; sole-trader and partnership cases need greater care. ICO B2B guidance is currently under review following legislative changes, so recheck it before a campaign.[3]

This guide is not legal advice and does not guarantee UK GDPR or PECR compliance. Obtain appropriate advice for your business, data, audience and marketing plan.

6. Implement, test and improve safely

Build one complete route from greeting to outcome before adding another. Keep the original map, message list and a record of meaningful changes. That makes it easier to see what was changed when a problem appears.

Beginner launch SOP: one chatbot conversation flow

SOP field	Detail
Owner	The named business owner or manager is accountable; assign a day-to-day flow editor and a human-handoff recipient.
Trigger / input	A website visitor opens the chatbot and selects a menu option or types a request.
Output	A clear approved answer, a correctly routed request, a verified transaction status, or a human/contact fallback.
Prerequisites	Approved content, privacy information, ownership, handoff hours, access roles, test cases and manual fallback are recorded.
Exception / human fallback	Unclear, urgent, sensitive, out-of-scope or failed-system cases stop the automated path and use the defined person/contact route.

Follow these numbered steps:

- 1. Create a controlled draft.** Build the flow in a draft, test or other non-public environment if your platform supports it. If it does not, use a restricted link or a carefully managed temporary launch. Do not rely on a setting called “silent mode” without checking what visitors can actually see.
- 2. Add only approved source material.** Check opening hours, service area, prices, policies, availability and product information against the current owner-approved source. Note the source and its review date.

3. **Set access deliberately.** Give access only to people who need it. Use named accounts rather than shared logins where possible, remove access when roles change, and enable the strongest available multi-factor authentication for administrative accounts. The NCSC says that password-only access is not strong enough for sensitive data in online services and advises MFA for additional protection.[4]
4. **Check provider and integration settings.** Before accepting personal data, understand the relevant account, retention, deletion/export, access, integration and logging settings. Check the provider's current documentation and contract terms; a tool's name or marketing statement is not a compliance assessment.
5. **Keep secrets out of chat content.** Do not put admin passwords, API keys, private customer data or internal instructions into public-facing messages or prompts. If an integration needs credentials, use the platform's approved secure method and limit the permission to what the flow needs.
6. **Test the main path and failures.** Use permitted test data. Have someone act as a visitor, including someone who did not write the flow. Test mobile as well as desktop where your customers use both.
7. **Approve the release.** The owner checks the test record, privacy wording, handoff route and fallback. A release decision can be "launch with restricted scope", "fix and retest" or "do not launch yet".
8. **Tell the receiving team.** Make sure staff know what requests will arrive, what the chatbot has and has not promised, and how to use the manual process if it fails.
9. **Review real interactions.** Inspect a small, proportionate sample and aggregate patterns. Do not retain chat transcripts or sensitive information longer than you need merely because it might be useful later.

The NCSC small-organisations guidance covers protecting accounts and devices, backups and recognising scams; use it as a practical starting point for your wider business security controls. Security work is ongoing and this checklist is not a guarantee against incidents.[5]

Use a test scorecard

Test ordinary cases, awkward cases and failures. Keep some cases separate from edits so you can see whether a change genuinely works beyond the example used to create it.

Test case	Expected outcome	Actual outcome	Clear? (1–5)	Logical flow? (1–5)	Helpful? (1–5)	Correct routing / safe outcome ?	Issue, owner and due date
Visitor asks a common FAQ							

Test case	Expected outcome	Actual outcome	Clear? (1–5)	Logical flow? (1–5)	Helpful? (1–5)	Correct routing / safe outcome ?	Issue, owner and due date
Visitor chooses each menu option							
Visitor gives an unexpected answer							
Visitor asks to speak to a person							
Visitor submits an out-of-scope request							
Booking/ stock/ inbox integration is unavailable							
Visitor tries to share sensitive information							
Mobile test							

A test with a handful of messages can show that a route works for those messages. It does not establish a universal accuracy, conversion or revenue result. Record sample size, selection and remaining limitations before widening the scope.

Fix common patterns, not just individual messages

Observation	Likely improvement to test
The flow feels scripted	Make acknowledgements specific and shorten unnecessary boilerplate; retain clear choices.
Visitors do not know what happens next	Add one explicit next step, outcome or contact route.
People leave when asked for data	Give value first, remove unnecessary fields and clarify why each essential field is needed.
Visitors ask what the chatbot can do	Make the greeting and first menu more specific.
The fallback appears often	Add a route for a recurring approved question or improve the question wording; use human handoff for the rest.
Staff receive incomplete requests	Add one necessary qualifying question or adjust the handoff summary, then retest.
The bot promises something the team cannot deliver	Remove or qualify the claim, correct the source content and provide a manual route.

Adopt an operating rhythm you can sustain

The following is an **illustrative** review rhythm, not a required timetable or a performance guarantee.

Stage	Suggested focus	Decision
Before launch	Complete the test scorecard; check privacy wording, contacts and manual fallback	Launch, restrict scope, or fix and retest
First week	Look for broken routes, urgent handoffs and misunderstandings	Correct material issues promptly
Early review period	Review highest-volume paths, exits, handoff quality and staff workload	Make one prioritised change at a time

Stage	Suggested focus	Decision
Ongoing	Check source information, access, integrations, metrics and recurring failures	Maintain, improve, narrow or retire the flow

When a message, prompt, knowledge source, integration or policy changes materially, retest the relevant route. Keep a rollback or manual route so staff can continue to help customers while an issue is fixed.

7. Adaptable conversation templates

These are writing frameworks, not scripts to paste unchanged. Replace every bracketed item with information your business has approved. Remove any claim, timing or price you cannot substantiate. Confirm your privacy wording, handoff route and system actions before publishing.

FAQ template: opening hours, location or service area

Visitor: “What time are you open?”

Chatbot: “Our current opening hours are [approved hours]. Are you planning to [visit / call / collect] on a particular day?”

Visitor chooses a day.

Chatbot: “For [day], we are [approved answer]. I can also help with [one or two relevant options], or you can contact our team at [route].”

If the answer is not in the approved source: “I cannot confirm that detail in this chat. Would you like the contact details for our team?”

Lead or enquiry-capture template

Chatbot: “Hello — I’m the automated website assistant for [Business]. I can help with [specific options] or pass a request to our team. What brings you here today?”

Visitor selects a topic.

Chatbot: “Thanks. To point you in the right direction, what is the main outcome you are looking for?”

Visitor replies.

Chatbot: “[Give a short, approved response or link]. Would you like [a relevant next step: a call request / a service overview / a visit request]?”

Visitor says yes.

Chatbot: “To arrange that, may I take your [essential contact field]? We will use it for [stated purpose]. [Privacy-notice link or short just-in-time wording.]”

Chatbot after the field is supplied: “Thank you. Your request has been [submitted / saved for our team] if the system has confirmed it. [State the actual response process, without inventing a deadline.] Is there anything else from the options above that I can help with?”

Human fallback: “If you would rather speak to someone now, contact [route and hours].”

Appointment-request template

Chatbot: “Would you like to request an appointment with our team?”

Visitor says yes.

Chatbot: “Which service is your appointment about?”

Visitor selects a service.

Chatbot: “I can help you [choose a time from verified live availability / send a request to our team]. Which do you prefer?”

If live availability is genuinely connected and current: show only the times returned by the service, then ask for the essential details required to make the booking. Confirm only when the booking system reports success.

If availability is not connected: “Please tell us your preferred day or time window. We will check availability and contact you using [field]. This is a request, not a confirmed booking.”

Exception route: “To change an existing appointment / discuss a complex request, please contact [team and route].”

Product-recommendation template

Chatbot: “Welcome to [Store]. I can help you narrow down an option from our [approved range]. What type of [product] are you looking for?”

Visitor selects a category.

Chatbot: “What matters most: [approved priorities such as size, material, compatibility, price range or delivery option]?”

Visitor selects a priority.

Chatbot: “Based on that choice, [approved product/range] may be worth considering because [factual, approved reason]. Would you like to see the product page, compare other options, or ask the team?”

Only show current price, stock or delivery status when a verified source supports it at that moment. If not, link to the current product page or route the visitor to the team. Do not represent a recommendation as personalised advice or a guarantee that a product is suitable.

Launch decision worksheet

Complete this before public release. A “not yet” decision protects visitors and staff when important controls are incomplete.

Check	Yes / no / not applicable	Evidence or action needed	Owner	Date
One primary use case and boundary are documented				
Every customer-facing fact has an approved, current source				
Greeting says the visitor is using a chatbot and explains its scope				
Main routes, exits and fallback messages have been mapped				
A human handoff is staffed and has accurate hours/contact details				
Data fields are necessary and privacy information is available at collection				
Marketing follow-up, if any, has been assessed separately				

Check	Yes / no / not applicable	Evidence or action needed	Owner	Date
Admin access, MFA and integration permissions are checked				
Normal, unusual and failure cases were tested on relevant devices				
Manual fallback and rollback are understood by staff				
Review date, metrics and owner are scheduled				

Release decision: launch with this scope / fix and retest / do not launch yet

Decision owner and date:

Your next practical step

Choose one repeat customer question that has a stable answer and a clear human fallback. Map the flow on one sheet of paper. Write a greeting, one complete route and one handoff message. Test it with a colleague who did not build it. Correct what confuses them before choosing more features.

A chatbot is useful when it helps a customer take the right next step and helps your team handle the work responsibly. Start small, keep promises accurate and use real interactions to decide what to improve.

Publication and use notice

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it does not guarantee a compliant, secure or commercially successful chatbot. Technology, supplier terms and UK guidance can change; check current official guidance and obtain appropriate professional advice for your circumstances.

References and verification notes

[1] Information Commissioner's Office, [Principle \(c\): Data minimisation](#). Checked 10 October 2026. ICO guidance notes that it is under review following changes made by the Data (Use and Access) Act.

[2] Information Commissioner's Office, [Right to be informed](#). Checked 10 October 2026. ICO guidance notes that it is under review following changes made by the Data (Use and Access) Act.

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[4] National Cyber Security Centre, [Why MFA matters](#). Checked 10 October 2026.

[5] National Cyber Security Centre, [Small organisations guide to cyber security](#). Checked 10 October 2026.