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AI / BUSINESS GROWTH / EBOOK & PLANNING WORKSHEETS

Sales Chatbot Playbook for UK Small Businesses

A UK-focused practical guide and implementation workbook for small-business owners and managers who want to build one helpful, human-supervised sales chatbot. It covers conversation mapping, channel choice, beginner-friendly rules-based flow setup, transparent copy, respectful qualification, PECR/UK GDPR considerations, security, handovers, measurement, CRM/AI boundaries, SOPs, a standalone launch checklist and usable worksheets.



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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 implementation workbook for helpful, human-supervised sales conversations

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A sales chatbot is not a replacement for good service or good judgement. Used well, it can greet someone promptly, answer a small set of approved questions, collect only the information you need and pass the conversation to the right person. Used badly, it can frustrate people, collect more data than it needs and make promises your business cannot keep.

This guide helps a UK small business build a first, rules-based chatbot that is useful to customers and manageable for a small team. It is written for owners and managers rather than developers. Start with one customer journey, one channel and one clear human fallback.

What this guide covers

- mapping the conversation your best team member already has;
- choosing one sensible channel and matching the opening message to the customer's context;
- writing short, useful chat messages and using buttons where they help;
- qualifying and routing enquiries without treating people dismissively;
- handling unanswered chats, handovers and exceptions;
- measuring the journey without mistaking activity for a result;
- protecting accounts, customer data and human oversight; and
- deciding when a CRM connection or AI-assisted answer is appropriate.

How to use it: read Sections 1–4 before opening any software. Complete the worksheets as you go. Then follow the three SOPs and the standalone launch checklist. The fictional examples show a way to think; they are not Ascendea client stories, results or promises.

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1. Start with a useful, limited job

A chatbot should have a job that is small enough to explain in one sentence. “Automate sales” is too broad. “Help a visitor choose the right repair category and request a callback” is specific enough to design, test and supervise.

A good first job usually has these features:

- the question occurs often enough to justify a prepared answer;
- the answer comes from approved business information;
- the customer can choose a simple next step;
- a person can take over when the case is unclear; and
- the business can continue manually if the tool is unavailable.

For a trades business, the job might be to collect a postcode, service type and preferred callback period, then tell the customer that availability will be confirmed by the office. For an accountancy practice, it might be to route a prospective client to the right service enquiry form without giving tax advice. For a retailer, it might be to answer approved delivery or returns questions and direct the customer to the correct product page.

Do **not** start with a chatbot that gives medical, legal, regulated financial or safety-critical advice, changes bookings without controls, negotiates bespoke prices, accepts sensitive documents, or sends a binding commitment. These situations require more specialised design and accountable human review.

Define the boundary before the welcome message

Write four lines before you create a flow:

Decision	Your answer
Customer problem we will help with	
Information the bot may use	

Decision	Your answer
Actions the bot may take	
Actions reserved for a person	

Fictional example — local heating firm. The chat assistant may answer approved opening-hours, service-area and appointment-request questions. It may collect a contact preference. It must not diagnose a gas appliance, promise attendance times, quote an emergency call-out, or tell a customer it is safe to wait. Those enquiries are handed to a trained person or emergency instruction immediately.

Worksheet 1 — your first chatbot decision

Business and owner:

One customer journey to improve:

What a successful customer can do by the end:

Approved sources of information:

Data we genuinely need:

Actions the bot must never take:

Named human fallback and how they are alerted:

Decision: build / narrow / do not automate yet Next action, owner and date:

2. Learn from your existing conversation

Software does not repair a muddled sales process. Before you automate, listen to or review a small set of real, permitted conversations. Look for the questions your team repeats, the point at which a person needs more context, and the information a colleague needs to take over without asking the customer to start again.

Ask the person who handles enquiries:

1. What does a customer usually ask first?
2. Which one or two questions make it possible to help them usefully?
3. What approved information can you give immediately?
4. What makes an enquiry unsuitable, outside scope or urgent?
5. What must be handed to a person, and to whom?
6. What information does that person need at handover?

Keep the language the customer uses. If people ask “Can you come out to look at it?” do not replace it with a company phrase such as “initiate a site-assessment workflow”. The goal is a helpful conversation, not an impressive-sounding form.

Map the simple path first

A simple first path is:

1. **Contextual greeting** — acknowledge what the customer has just done.
2. **Useful help** — answer the obvious question or deliver the promised resource.
3. **One easy choice** — ask a short question with clear options.
4. **Relevant question** — collect only the next fact needed to route the enquiry.
5. **Next step** — provide an approved link, record a request or hand the chat to a person.
6. **Fallback** — make it clear what happens if the bot cannot help.

This is sometimes described as **Hook** → **Value** → **Ask**. It is a useful drafting check, not a promise that every person will complete a conversation.

Stage	What the customer needs	What the business needs	Example for a decorating firm
Hook	Confirmation they reached the right place	Entry-point context	“Thanks for asking about a decorating quote.”
Value	A clear, immediate answer or path	Trust and expectation-setting	“We work on homes and small commercial spaces in the local area.”
Ask	One easy next step	A routing fact	“Is the work for a home or a business?”

Stage	What the customer needs	What the business needs	Example for a decorating firm
Route	A realistic outcome	A complete request	"A team member will review your request and confirm whether we can help."

Entry points must match the first line

A conversation feels disjointed if a customer taps "Get the kitchen measuring checklist" and receives "Hello, how can we help?". List every place that can start a chat: a website button, an Instagram story, a Facebook advert, a QR code on a van, a product page or a WhatsApp link.

For each entry point, record the promise the customer saw and make the first chat message fulfil it. If an advert promised a guide, deliver the guide before asking about their project. If a product page started the chat, identify the product page in the handover context where the platform permits it.

Worksheet 2 — conversation map

Entry point:

What the customer just saw or did:

First line that acknowledges that context:

Approved value we can give immediately:

Question 1 and answer options:

Question 2 and answer options:

Qualified next step:

Unclear, urgent or out-of-scope fallback:

Decision: simplify / test / revise source information Next action, owner and date:

3. Choose one channel, then check the rules

Choose your first channel from evidence, not fashion. Review your most recent enquiries and ask where the useful conversations actually begin. A website chat may suit visitors comparing services. A direct-message channel may suit a visual retailer with an established audience. WhatsApp may suit customers who already expect to message the business, provided its opt-in, platform and data-handling requirements are met.

Start with one channel. A single working conversation is more useful than several unfinished flows that give different answers.

Channel or entry point	A reasonable first use	Check before launch
Website chat	Route service or quote enquiries; answer a small FAQ set	Privacy notice, accessibility, office-hours expectation and fallback contact route
Instagram or Facebook direct messages	Continue a conversation started by a relevant post or advert	Current platform features, permissions, marketing rules and whether a person can take over
WhatsApp Business Platform	Requested updates, service conversations or a customer-initiated enquiry	Current opt-in, template, pricing, account ownership and quality requirements
Email or a form	Collect a non-urgent enquiry where a chat would be excessive	Clear response expectation, minimised fields and an acknowledgement route

WhatsApp: use the current rules, not an old screenshot

Meta's current documentation says that a WhatsApp customer service window opens for 24 hours when a user messages or calls the business, and resets if the user messages or calls again before it expires. Within that window, service messages can be free-form; outside it, Meta says pre-approved template messages are required. Meta also says messages may only be sent to users who have opted in. [1](#)

This is a platform rule, not permission to send unnecessary marketing. Before setting any follow-up, confirm the current rule in the product documentation, the purpose of the message, the customer's opt-in and the relevant UK marketing/privacy duties. Do not copy an old "23-hour last chance" tactic or assume a template will be approved, delivered or appropriate.

UK outreach and privacy: take the more protective route when unsure

Under the ICO's current guidance, direct messages via social media can count as electronic mail. PECR's electronic-mail rule does not apply to corporate subscribers in the same way, but a business must not conceal its identity and must give a valid opt-out address. Sole traders and some partnerships are treated as individual subscribers: direct electronic marketing needs specific consent unless the limited soft opt-in conditions are met. Where identifiable business-contact data is processed, UK GDPR obligations still apply, including the right to object. The ICO flags parts of its PECR guidance as under review, so recheck it before campaign use. [3](#)

For a small business, that means:

1. Separate **service replies** from **marketing messages** in your design.
2. Identify whether you are contacting a corporate body, sole trader or partnership; do not guess.
3. If status is unclear, treat the contact as an individual subscriber or obtain advice.
4. Keep your identity, contact route and opt-out method clear.
5. Keep a suppression list and apply it before any new campaign.
6. Provide privacy information when you collect or use personal data, and document the lawful basis that applies to your activity.
7. Do not turn a connection request, enquiry or publicly visible email address into a blanket permission for automated marketing.

This is general education, not a legal opinion. Telephone marketing, cookies/tracking, automated calls and sector rules have separate requirements.

4. Write messages that help on a small screen

Chat is easier to read when each message does one job. A customer should not need to scroll through a miniature brochure to choose the next step.

Use these writing rules:

- Put the useful answer before the request for information.
- Use ordinary UK English and name the next action plainly.
- Ask one question at a time.
- Use buttons or numbered options when the choice is genuinely limited.
- Avoid fake urgency, invented stock levels, unsupported discounts or claims about results.
- State when a person will reply rather than implying instant human availability.
- Do not pretend that an automated assistant is a named employee.

A practical message pattern

Context: “Thanks for asking about a commercial cleaning quote.”

Value: “We can help businesses within our stated service area. A short request helps us send the right person.”

Ask: “Is this for an office, shop or another type of premises?”

The next message should use the answer rather than restart the script. For example, after “shop”: “Thank you. Is the cleaning needed before opening, after closing, or at another time?”

Make the automation clear

A transparent opening protects trust. For example:

“You’re chatting with the automated enquiry assistant for [Business]. It can answer a few common questions and pass your request to our team. If you need a person, choose ‘Speak to the team’.”

The tone should suit the business. A solicitor’s office, independent retailer and gardening service can each sound friendly without copying the same personality. Consistency matters more than sounding clever.

Example: three approved response types

Customer need	Suitable first response	Human boundary
Opening-hours question	“Our published opening hours are [hours]. Would you like to ask about a service or request a callback?”	If an appointment or exception is requested, confirm with a person before promising it.
Service-area question	“We normally work in [area]. Please share the first half of your postcode and service type so we can check.”	Do not use a postcode to infer extra personal information or make unsupported coverage promises.
Complex or unhappy customer	“I’m sorry this has been frustrating. I’m passing this to the team rather than guessing.”	Pause automation and tell the person what response route is available.

AI prompt pack — draft, then verify

AI can help you turn approved notes into a first draft. It does not know your current availability, prices, policies or legal obligations. Do not paste customer messages containing personal, confidential or sensitive information into an AI tool unless your organisation has assessed and authorised that use.

Safe input checklist before any prompt

- Use approved, current business information only.
- Remove customer names, contact details, account references and sensitive facts.
- State the audience, channel and hard boundaries.
- Ask for options, not automatic publication.
- Check every factual statement, price, time, link and policy against the source owner before use.

Prompt 1 — map the helpful path

You are helping a UK small business design a rules-based chat flow. Use only the approved information below. Create a short conversation map with: entry context, one useful answer, no more than three simple routing questions, a human-handover condition, an out-of-scope response and a manual fallback. Do not make claims about availability, price, outcomes, legal compliance or qualifications unless the approved information explicitly states them. Use plain UK English.

Approved information: [paste non-personal, approved facts]

Customer entry point: [where they came from]

The bot may: [allowed actions]

The bot must not: [prohibited actions]

Human review: compare the draft with the real service, delete any invented wording, and test every option with the person who receives the handover.

Prompt 2 — make a message easier to answer

Rewrite the approved message below for a small-screen chat. Keep every factual statement unchanged. Give three alternatives, each with one clear question or button choice. Do not add urgency, discounts, promises, personalisation, marketing consent language or claims not present in the source.

Approved message: [paste]

Human review: choose only a version that is accurate, inclusive and suitable for the stated channel.

Prompt 3 — look for failure cases

Review this rules-based chatbot flow as a cautious operations reviewer. List: ambiguous customer answers, missing handovers, places where the bot could over-promise, data fields that may be unnecessary, and points where a person should be involved. Do not assume facts beyond the flow. Return a prioritised test list.

Flow: [paste non-personal flow]

Human review: use the list to create tests; do not treat it as a security, legal or compliance assessment.

5. Ask only what you need, then route with care

Qualification is not about excluding people for its own sake. It is about directing someone to the right service, setting a realistic expectation and protecting the team from work that cannot lead to a useful next step.

Start with the minimum facts needed for the next action. A service business might need service type, broad location and preferred contact method. A B2B supplier might need organisation type, the problem being explored and the responsible contact route. Do not collect date of birth, payment details, health information, identity documents or other sensitive information merely because a form can contain them.

Use respectful routing questions

A good routing question has a business reason the customer can understand.

Purpose	Better question	Avoid
Service area	"Which outward postcode is the property in?"	"Give us your full address before we tell you whether we cover you."
Service type	"Which service are you asking about?"	A broad free-text question when a few clear options will do.
Project timing	"When would you ideally like to discuss this?"	Pressuring someone to state a budget before they understand the offer.
Fit boundary	"We currently provide this service to [defined customer group]. Would you like the relevant information?"	A dismissive refusal with no explanation or alternative route.

Tags are internal notes, not labels for people

Many tools call internal categories “tags”. Treat them as a concise, auditable record of the customer’s stated need, such as service: boiler repair, area: LS, requested: callback or handover: complaint. Avoid judgemental labels and assumptions such as “poor fit”, “difficult” or “high value” based on an individual’s identity or speculative score.

Record only information that helps the next colleague serve the customer. Set a retention period for chat records and decide who can see them. If you connect tags to a CRM, make sure the fields and permissions match the purpose you explained to the customer.

Simple flow logic for beginners

You do not need code to understand a basic flow builder. Most tools offer the same three ideas:

Logic type	What it does	Example
Sequential step	Shows the next approved message	Confirm a request, then show the available service options.
Choice branch	Sends a selected option to the matching path	“Home” goes to residential questions; “Business” goes to commercial questions.
Fallback or stop	Catches an unclear answer and routes safely	After an unrecognised reply, offer “Choose an option” or “Speak to the team”.

Never create a loop that repeatedly demands information. After one clear retry, offer a human route or a different non-chat route. A confused customer is a reason to simplify the flow, not a reason to make the bot more persistent.

6. SOP 1 — plan and approve your first rules-based flow

Owner: Business owner or service lead, with the person who will receive handovers.

Trigger/input: A decision to improve one recurring customer journey; approved business information; access to a test account.

Output: A one-page conversation map, approved messages, data list, handover plan and test cases.

Human fallback: Stop the build if the service boundary, source information, data use or receiving team is unclear.

1. Choose one defined customer journey from Worksheet 1. Write the expected customer outcome in one sentence.

2. List the approved facts the bot may use. Include the owner and review date for every price, policy, opening hour, service area or link.
3. List the minimum data fields needed to complete the next step. Remove fields that are only “nice to have”.
4. Draw the happy path: entry point, greeting, value, up to three routing questions, outcome and handover.
5. Add the expected off-path cases: unclear answer, complaint, urgent/safety issue, unsupported request, request for a person, no reply and platform outage.
6. Decide the exact handover destination: named inbox, task queue, phone line or nominated person. Agree who monitors it and when.
7. Write the bot disclosure, privacy wording/link and customer-facing expectation for a human response.
8. Check the messages against the current channel rules and the UK compliance questions in Section 3.
9. Ask the service owner to approve the facts and the receiving team to approve the handover summary.
10. Create a dated version record. Do not publish a flow that has no accountable owner.

Exception: If the only way to make the flow useful is to collect special-category, financial, identity or high-risk information, pause. Seek an appropriate specialist review or redesign the journey to collect less.

7. SOP 2 — build the first flow in a platform

Owner: Nominated administrator; business owner retains ownership of the account.

Trigger/input: Approved conversation map, messages, test cases and a chosen channel/platform.

Output: A tested draft flow in a non-live or limited-release setting, with documented permissions and rollback steps.

Human fallback: Disable the automated route and direct customers to the existing monitored contact route if testing fails or an issue is found.

1. Create or confirm the business-owned platform account. Record the legal account owner, billing owner, administrator and recovery contact. Do not leave the only administrator role with a former employee, contractor or agency.
2. Enable multi-factor authentication for each administrator and use a unique password or passkey stored in an approved password manager. Give each person their own account; do not share logins.
3. Confirm the channel's current onboarding requirements, permitted message types, opt-in/consent configuration, pricing and template process in the provider's official documentation. For WhatsApp, confirm the current customer service window and template rules before configuring follow-ups. [1](#)

4. Create a draft workspace, test mode or limited audience if the platform offers one. Do not begin with every traffic source.
5. Add the opening message and disclosure. Link to the relevant privacy information where appropriate.
6. Add one message block at a time. Use a button or clear reply option for each limited choice. Name blocks plainly, for example 01 greeting, 02 service type, 03 callback request.
7. Add an internal action only where needed: assign the conversation, record a necessary routing field or create a task. Check that it does not expose another customer's data.
8. Add an explicit `Speak to the team` route, an unrecognised-answer route and any safety/complaint route. Each must pause or end automation where a person needs to decide.
9. Configure a concise handover summary: entry point, customer's selected options, last question, stated need and requested contact method. Do not add speculation or unrelated history.
10. Configure an acknowledgement for a request rather than an unverified promise. Example: "Thanks — the team will review your request. If you have an urgent safety concern, use [approved emergency route]."
11. Test from a customer account using the cases in Section 10. Test a person request, wrong button, unexpected typed reply, missing information, handover, repeat message and outage/fallback.
12. Obtain sign-off from the business/service owner. Publish only the approved version and retain a copy of the version map and test result.

Exception: If a provider change, rejected template, unavailable integration or platform error breaks the customer journey, turn off the affected automation. Do not silently leave a path that appears live but does not reach a person.

8. Protect the people, accounts and information

A chatbot holds a front-door position in the business. It may receive customer messages, create tasks and connect to calendars or CRM records. Treat it as an operational system, not merely a marketing asset.

The NCSC's small-organisation guidance covers protecting accounts, devices and backups. Its secure-AI guidance recommends appropriate access controls, protection of data and APIs, incident procedures, clear user limitations, logging/monitoring that respects privacy, and retesting meaningful changes. These are sensible design principles, not a guarantee of compliance or security. ⁴

Proportionate security checklist

Control	Beginner-friendly action	Owner
Account access	Give each admin a separate login; enable MFA; remove leavers promptly.	Account owner
Credentials	Keep API keys, recovery codes and passwords out of chat messages, shared notes and prompts. Store them in an approved secure location.	Administrator
Least privilege	Connect only the inbox, calendar or CRM fields the flow needs. Avoid broad administrator access for a simple routing bot.	Administrator with business owner
Data minimisation	Collect the fewest fields that complete the stated task; set a review/retention decision.	Data/process owner
Testing	Use non-personal test data where possible. Test that one customer cannot see another customer's context.	Tester and service owner
Monitoring	Check failed handovers, error messages, access changes, unusual messages and customer complaints.	Operations owner
Recovery	Keep the manual contact route visible; know how to turn off the flow; test backup/recovery arrangements proportionately.	Business owner
Change control	Record what changed, why, who approved it and what tests were rerun.	Flow owner

For AI-assisted flows, treat instructions inside an email, attachment or customer message as **content to handle**, not authority to change the bot's rules. Keep high-impact actions behind human approval. Give the bot a narrow approved source set and a clear response for "I do not have enough information".

9. SOP 3 — operate handovers and stalled conversations

Owner: Named sales, customer-service or operations lead; a named deputy covers absence.

Trigger/input: A customer requests a person, the bot detects an exception, a qualified request is completed, or a conversation stops at a material step.

Output: A timely, documented human response or a respectful close, with the flow issue recorded where relevant.

Human fallback: If the alerting system fails, the team checks the shared inbox/task queue manually and the automated flow is paused if customer requests are being missed.

1. Define three routes in your team's own terms: **routine**, **review** and **immediate human attention**. Do not rely solely on a tool's sentiment score or a guessed commercial value.
2. For routine requests, let the bot give approved information or collect the agreed request details. Check the queue on the published schedule.
3. For review requests, assign a named person to read the conversation and decide whether to respond, call, request more information or close the case. Examples include a bespoke quote request, repeated uncertainty or a request outside the standard service.
4. For immediate human attention, pause automation. Examples include "speak to a person", a complaint, a possible safety issue, an urgent issue defined by the business, a vulnerable-customer concern, an account issue or two failed clarification attempts.
5. Give the human the handover summary and conversation context. The person should acknowledge what the customer has already said rather than restart with "How can I help?".
6. Do not promise a specific human response time unless the business can meet it. If out of hours, state the approved next route and do not imply that someone is watching live.
7. For an incomplete conversation, consider whether any follow-up is permitted, appropriate and useful. On WhatsApp, confirm opt-in and the current window/template rules; on any channel, apply your marketing/privacy rules and suppression list. [1](#) [3](#)
8. Use a low-pressure follow-up only where there is a genuine customer benefit, such as completing a requested appointment or resolving a technical problem. Do not invent scarcity, claim to know why someone stopped, or keep sending messages after an objection or opt-out.
9. Record the outcome: answered, handed over, declined, withdrawn, not a fit, technical failure or compliance concern. Use this record to improve the process, not to build an unnecessary profile.
10. Escalate a pattern of complaints, failed handovers, wrong answers or unauthorised data access to the business owner and pause the affected path while it is investigated.

Handover template

Handover field	What to include
Customer request	Their own words where possible, or a neutral summary
Route reason	Person requested / bespoke quote / complaint / unclear answer / safety route
Information already supplied	Only the relevant selected options or facts
Last step	The last question or action in the flow
Needed action	Reply, call, investigate, book manually or explain boundary
Owner and deadline	Named human and internal target, not an unverified customer promise

10. Measure the journey, not vanity numbers

A message being delivered or opened is not evidence that the customer was helped. Track the steps that matter to your actual business and use a clear denominator.

Measure	Calculation	What it can reveal
Started conversations	Count of distinct conversations started in the period	Demand at an entry point; not sales value by itself
Completion to next step	Completed agreed action ÷ started conversations	Whether the flow makes the next action clear
Drop-off by step	People reaching a step but not progressing ÷ people reaching that step	A confusing question, unwanted data request or broken link
Human-handover rate	Conversations handed to people ÷ started conversations	Whether boundaries and bot capability are realistic
Handover response performance	Handovers responded to within the internal standard ÷ handovers	Capacity and monitoring gaps

Measure	Calculation	What it can reveal
Customer correction/error rate	Documented wrong, unsafe or corrected responses ÷ reviewed responses	Source-information or design risk
Attributed enquiry outcome	Agreed completed outcome linked to a conversation, with method stated	Whether the chat is contributing, without claiming it caused all revenue

Do not claim that a conversation caused a sale just because a chat occurred somewhere on the journey. If you use revenue attribution, state the method and its limitations. Include human review time, corrections, support work and third-party platform costs. A faster automated message does not prove that the whole customer process is better.

Weekly improvement routine

1. Review a small, permitted sample of completed, abandoned and handed-over conversations.
2. Find one specific point of friction: a confusing label, broken button, unnecessary question, slow human handover or wrong answer.
3. Check the approved source information before changing wording.
4. Change one meaningful variable at a time and record the version.
5. Test the revised path before release.
6. Compare the same measure and time period; do not declare a result from a handful of anecdotes.
7. Keep a route to roll back if the new version causes a problem.

Worksheet 3 — measurement and improvement plan

Primary customer outcome:

Measure and denominator:

Current baseline/observation period:

One flow step to observe:

What could explain a drop-off or error:

One controlled change to test:

How we will protect customer service while testing: ____

Decision after review:

Next action, owner and date:

11. Connect a CRM or AI only when the foundation works

A CRM connection can help a team avoid retyping a request and make ownership visible. It can also create a larger data and access problem if fields are mapped carelessly. Begin with a small, purpose-bound connection: create an enquiry record with the customer's approved contact route, request type, source and handover status. Confirm who owns the record, who may see it and how duplicates are handled.

Before connecting a CRM:

1. Map each chat field to a named CRM field and explain why it is needed.
2. Decide whether the action creates a new record, updates an existing record or requires human review first.
3. Test duplicate events, a failed sync, an unavailable CRM and an incorrect match.
4. Make sure the customer can still be helped if the CRM is unavailable.
5. Do not let an automated flow expose historical customer information without a clear permission and access design.
6. Record the account owner, support route and removal/rollback steps.

AI may be useful after the rules-based version is stable. It can help interpret a natural-language question, search an approved knowledge base or prepare an internal draft. It is not a reason to remove the boundaries above. Start with an internal suggestion or a supervised draft, test representative and difficult cases, and give people a clear way to correct or escalate an answer. Keep a human approval step for consequential actions such as bookings, discounts, cancellations, regulated guidance or changes to customer records.

12. Standalone chatbot launch checklist

Use this page before you activate a first or changed flow. A “no” is a reason to pause, not a reason to publish anyway.

Check	Yes / no	Evidence or owner
One customer journey and customer outcome are defined.		
The flow has a named business owner and a handover owner.		
Every price, service claim, link, opening hour and policy was checked against an approved current source.		
The entry-point promise matches the first chat message.		
The bot clearly identifies itself as automated and offers a route to a person.		
The flow asks only for data needed for the stated next step.		
Privacy information, retention and access decisions are recorded.		
Marketing/service distinction, opt-in and UK PECR/UK GDPR questions were checked for the chosen use.		
Corporate, sole-trader and partnership status is handled cautiously for any proactive electronic marketing.		
Provider rules, templates, opt-in and costs were checked in current official documentation.		

Check	Yes / no	Evidence or owner
Each administrator has an individual account and MFA; recovery and leaver access are controlled.		
Credentials are not in chat content, prompts or shared documents.		
Routine, review and immediate-human routes are defined.		
A person request, complaint, unclear answer, outage and repeated-error case were tested.		
The handover summary includes the context a colleague needs and no unnecessary data.		
The existing manual contact route works if the automation is disabled.		
Measures, denominators, review date and rollback route are recorded.		
The service owner approved the version actually being released.		

13. Workbook — launch decision and 30-day operating plan

Your release decision

Flow name and version:

Channel and entry point:

Customer outcome:

Approved information owner and review date:

Data collected and reason for each field:

Handover owner and manual fallback:

Privacy/marketing/platform checks completed by:

Security/account checks completed by:

Test cases completed and evidence location:

Known limitations or excluded requests:

Release decision: release limited flow / revise / do not release Decision owner and date:

First 30 days — learning plan

Review point	What to check	Decision or action	Owner	Date
Before launch	Launch checklist and manual fallback			
First monitoring review	Handover queue, failures, customer complaints and source accuracy			
First improvement review	One drop-off or friction point, with versioned test			

Review point	What to check	Decision or action	Owner	Date
Access review	Administrators, leavers, MFA and connected-system permissions			
Month-end review	Customer outcome, operational workload, cost and whether to retain/narrow/stop			

A well-run first chatbot is allowed to be small. Build a conversation that gives a customer a clear answer, makes a modest request and knows when to hand over. That is a sound foundation for better service and responsible automation.

References and current checks

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3. [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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5. [National Cyber Security Centre — Small organisations guide to cyber security](https://www.ncsc.gov.uk/collection/small-organisations-guide-to-cyber-security)
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Editorial check date: 10 October 2026. Platform features, prices, policies and UK guidance can change. Recheck the official resources before implementation.