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AI / BUSINESS GROWTH / CHECKLIST

Plan Your Sales Chatbot — Strategy Mapping Checklist

A standalone UK small-business checklist for mapping one sales-chatbot journey before build: learn from suitable conversations, define entry context and qualification, set a transparent voice and CTA, and prepare safe human handover and first-launch tests.



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Your route through this resource

What you will finish with.....	3
Before you start	4
1. Learn from a real sales conversation	5
2. Draw the straightforward customer route	6
3. Match the opening to the customer's entry point.....	7
4. Ask qualifying questions fairly and exit gracefully.....	9
5. Set a clear voice and make automation obvious	11
6. Choose one next step and make it easy to take.....	12
7. Design the human handover before launch.....	13
Turn the map into a small, controlled first build	15
First-launch review and next action	16
Notice and references	17

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 planning workbook for UK small businesses

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A useful sales chatbot starts with the conversation your customers actually need, not a collection of software features. Use this checklist before you configure a website chat widget, social inbox automation or CRM workflow. It will help you map one clear route from a customer's first message to an appropriate next step — while keeping people in control when a question, complaint or decision needs a person.

This is written for a UK owner-manager or small team. You do not need to write code to complete it. Work through it on paper, in a shared document or on a whiteboard. Start with one customer journey, one offer and one channel. Add further routes only after the first one is clear and tested.

Use it as a planning tool, not a promise machine. A chatbot can collect context, answer approved routine questions and route an enquiry. It should not invent prices, make binding commitments, give regulated advice, handle an upset customer alone or replace the judgement of your team.

What you will finish with

By the end, you should have:

- a short, evidence-based picture of how your best real enquiries are handled;
- a simple conversation map for one customer route;
- opening messages matched to the page, advert or action that started the chat;
- clear qualification rules, labels and polite alternatives for poor-fit enquiries;
- a voice guide, a single next step and safe handover rules;
- a small test plan your team can use before switching anything on.

Before you start

Choose one narrow use case. Good early choices include handling a request for a tradesperson's availability, routing an enquiry to the right professional-service team, helping a retailer answer a product-stock question, or collecting the basic facts for a B2B demonstration request.

Write your starting point below. If you cannot complete an item yet, leave the bot unbuilt and find the answer first.

Planning decision	Your answer
Customer route to map	
Channel to start with (for example, website chat or a business inbox)	
Offer or service discussed	
One useful outcome for the customer	
One primary next step for the business	
Named business owner for this route	
Human team member or queue that can take over	
Things the chatbot must never promise, decide or send	

Keep the first version within safe boundaries

- Use only information your business is entitled to use. Do not copy customer conversations, contact details or files into an AI tool simply because they are available to a member of staff.
- Ask only for information that is genuinely needed for the next step. Do not make an enquiry form into a survey.
- Keep a manual alternative. A customer should be able to phone, email or ask for a person where that is reasonable for your service.
- Give the chatbot only the permissions it needs. A first version can prepare an internal note or create a review task; it does not need authority to issue a discount, alter an order or make an external commitment.
- Decide who owns the account, checks the inbox, fixes errors and can turn the automation off. Protect the account with the access controls and device security appropriate to your business. The NCSC's small-organisation guide covers protecting accounts, devices, backups and scams [1].

1. Learn from a real sales conversation

Do not design from memory alone. Find a recent conversation that ended in a suitable sale, booking or qualified next step. If you are a sole trader, it may be your own conversation. If you have a team, choose the person whose approach is clear, accurate and appropriate — not simply the person who talks the most.

Step 1: Select three to five useful examples

Choose conversations that represent the route you want to support. A kitchen fitter might use enquiries about a standard survey. An accountancy firm might use calls from established limited companies seeking a bookkeeping discussion. A specialist retailer might use chats about an in-stock product rather than a complicated return dispute.

Before recording, transcribing or reusing a conversation, check your organisation's authority, notices, retention approach and access controls. Remove or replace unnecessary personal information in the planning notes. If a conversation concerns a complaint, health, legal issue, financial decision or another sensitive matter, do not use it as a casual chatbot template. Ask a responsible person whether it belongs in scope.

Example	Where it came from	What the customer wanted	Key facts that changed the outcome	Exact helpful wording or question	Personal data removed or protected?
1					
2					
3					
4					
5					

Step 2: Find the repeatable pattern

Read the examples and mark the moments below. You are looking for a helpful sequence, not a script that mimics one employee word for word.

- What prompted the customer to get in touch?
- What did they already know from the advert, website page, post or referral?
- What did the person answer first?
- Which two to five questions established whether the request was suitable?

- What reassurance or practical information helped the customer decide?
- What was the smallest sensible next step: an estimate request, a call, a fitting appointment, a product link or a human callback?
- What wording should **not** be automated because it needs judgement, a current price, a bespoke scope or an authorised person?

Step 3: Write your core qualifying questions

Make every question earn its place. Start with the information that determines whether you can help. For a local electrician this may be location and urgency. For a B2B software consultancy it may be the business problem and who is involved. For an online retailer it may be product, size or delivery location.

Question	Why you need it	Safe answer choices or format	What happens next

2. Draw the straightforward customer route

Map the **happy path**: the shortest sensible route for a customer whose request is in scope and who can answer the essential questions. It is not a prediction that everyone will follow it. It gives you a simple foundation to test before adding exceptions.

Step 1: Put the route on one page

Draw one box for each interaction and an arrow between the boxes. Use this order as a starting point:

1. **Entry and recognition**: the customer arrives from somewhere specific.
2. **Immediate help**: give the answer, link or choice they expected where possible.
3. **Purpose**: establish what they need.
4. **Qualification**: ask the minimum practical questions.
5. **Relevant value**: show the appropriate approved information or option.
6. **Next step**: ask for one clear action.
7. **Confirmation or handover**: tell the customer what happens next and who owns it.

Do not attempt every special case on your first map. Put unknown, unsuitable, urgent and complaint routes in a clearly marked **human help** box. Those are not failures; they are boundaries.

Step 2: Check each message with Hook → Help → Ask

For every box, write three small parts.

Part	What it does	Example: local heating engineer
Hook	Shows that the message relates to the action just taken.	"Thanks for asking about a boiler service."
Help	Gives a useful fact, option or reassurance that you can stand behind.	"We cover annual servicing in Leeds and nearby postcodes."
Ask	Requests the smallest next piece of information or action.	"Would you like to check whether your postcode is in our service area?"

This structure is not a conversion guarantee. It is a simple editing check: if a message has no purpose, remove it; if the customer needs an answer before a question, give the answer first.

Step 3: Apply the one-breath edit

Read each proposed chat bubble aloud. If it is difficult to say in one breath, split it. Use familiar words. Put important limitations near the relevant offer instead of hiding them after several messages.

Message number	Draft text	Does it answer one thing?	Shorter version or split needed?
1		Yes / No	
2		Yes / No	
3		Yes / No	
4		Yes / No	

3. Match the opening to the customer's entry point

A website visitor who clicks "delivery information" should not receive the same first message as someone who replies to a social post about a free consultation. List every planned way a customer can enter the route. Start with only the ones you can support reliably.

Step 1: Build an entry-point register

Entry point	What the person has just done	What they are likely expecting	First useful response	Route owner
Website service page	Read about a service	A quick fit check or a way to enquire		
Website FAQ page	Looked for an answer	The answer or an escalation route		
Click-to-message advert	Responded to a stated offer	The advertised information or eligibility check		
Social-post reply or direct message	Reacted to a topic	A relevant follow-up, not a generic sales pitch		
Existing customer support route	Asked for help	Service support, not a new-sales detour		

Step 2: Write the first line for each route

A first line should acknowledge the action, deliver any promised information and offer a simple next choice. Avoid pretending the bot has seen more than it has.

The examples in this section are illustrative templates, not customer testimonials, measured results or promises. Replace every claim with information currently approved for your business.

Website service-page example (illustrative)

“Hello — you’re looking at our kitchen design service. I can help you check whether your project is within our usual area, or arrange a call with the team. Which would help?”

Social-post example (illustrative)

“Thanks for messaging about the office-cleaning checklist. Would you like the checklist link, or are you looking for a quote for a regular service?”

FAQ example (illustrative)

“I can help with delivery questions. Is your question about delivery areas, estimated dispatch times, or an order already placed?”

Use only claims, prices, availability, delivery terms and offers that are currently approved. If a promotion has ended, remove its route before the chatbot can mention it.

Step 3: Treat outreach differently from inbound help

This checklist is mainly for a person who has chosen to start or continue a conversation. A proactive sales email, text or social direct message needs a separate legal and channel check.

The ICO says that direct messages via social media can count as electronic mail. Corporate subscribers are treated differently from sole traders and some partnerships under PECR. A company or LLP may be a corporate subscriber, while a sole trader or certain partnership is treated as an individual subscriber. When personal data is involved, UK GDPR obligations, including the right to object to direct marketing, still apply. Do not disguise your identity; provide and honour a valid opt-out route; keep a suppression list; and take the more protective route if status is unclear [2] [3]. ICO guidance is under review following the Data (Use and Access) Act, so recheck it before launching a campaign.

Do not turn a reply, button or comment into a reason to bypass a platform's messaging rules. For Meta Messenger and Instagram Messaging API, the current standard window varies by the action that opened it; it is commonly 24 hours and may be longer for specified click-to-message or click-to-direct advert interactions. Check the current policy, permitted message type and your actual platform configuration before sending [4]. Other platforms have their own rules.

4. Ask qualifying questions fairly and exit gracefully

A qualification route protects the customer's time as well as your team's. It should establish whether the request fits your stated service, location, capacity, product range or process. Do not use it to collect irrelevant sensitive details or to apply an unfair rule.

Step 1: List genuine deal-breakers

Write the rules your team already applies and name the person who has approved each one. Examples may include an out-of-area address for a local service, a request for a product you do not sell, a project below your stated minimum scope, or a request that needs a specialist you do not provide. Do not make an automated system decide a complex eligibility, credit, employment, health, legal or other high-impact matter without appropriate specialist design and review.

Rule or deal-breaker	Business reason	Exact question or data point	Approved answer if not a fit	Owner who can change the rule

Place a clear deal-breaker before you ask for a phone number or additional personal detail. If someone is outside your service area, tell them early rather than collecting a long brief you cannot use.

Step 2: Create a useful, polite exit

A good exit is honest, concise and gives help that you can actually provide. Do not make a referral you have not agreed with the other business. Do not tell someone they are unsuitable when the real problem is that the bot does not understand the question — hand that case to a person.

Template — out-of-area request

“Thanks for the details. We do not currently cover [area], so I do not want to waste your time by taking this further. You may find our [general guide / relevant trade-directory link] useful. If you think the location was entered incorrectly, choose ‘Speak to the team’.”

Template — service not offered

“Thanks for explaining what you need. That is not a service we provide, so a member of the team would not be able to quote accurately. Here is our current list of services: [link]. If another service may fit, choose one below or ask for a person.”

Step 3: Define simple internal labels

Labels help a human see the context at a glance. Use consistent names and only labels that somebody will act on. Do not use a label to make an unsupported assumption about a person.

Trigger or answer	Internal label	Why it is useful	Who can see it	Follow-up action
In-service-area postcode	Area: covered	Routes to the local team	Sales inbox	Continue fit questions
Work requested within a stated time frame	Timing: soon	Helps priority review	Sales inbox	Check capacity; do not promise a slot

Trigger or answer	Internal label	Why it is useful	Who can see it	Follow-up action
Product category chosen	Interest: [category]	Gives context for a human reply	Retail support team	Send approved product options
Bot cannot interpret request	Review: unclear	Prevents repeated guessing	Named duty person	Read the conversation and reply

5. Set a clear voice and make automation obvious

Your chatbot should sound like your business, but it does not need to pretend to be a person. Choose a tone that your customers will understand when they are busy, annoyed or using a phone with one hand.

Step 1: Complete a small voice guide

Voice decision	Your choice
Name used for the assistant, if any	
Formal, friendly or practical tone	
Words we use	
Words or phrases we avoid	
Emoji use, if any	
Approved greeting	
When a person must speak instead	

For example, a B2B engineering supplier may use short, factual language and no emoji. A neighbourhood café may sound warmer but should still be clear about opening hours, allergies and complaints. Match the voice to the audience and the importance of the decision; do not use a jokey persona where a customer is reporting a problem.

Step 2: State what the assistant is

A simple opening sets an honest expectation. Meta's current Messenger and Instagram policy says automated chat experiences must disclose automation where required by applicable law and recommends doing so as a best practice [4]. The wording below is a practical transparency measure, not a statement that it fulfils every legal requirement in every context.

"Hello — I'm the Ascendea Kitchens virtual assistant. I can answer a few routine questions and pass your enquiry to the team. Ask for a person at any point."

Include a meaningful route to a person. If your team is unavailable, say what will happen without inventing a response time. For example: "Our team will review this when the office reopens" is better than a promise you cannot keep.

Step 3: Use media only when it helps

An image, video, product card or downloadable guide should make the next choice clearer. Check that it is current, has an appropriate description or caption where needed, and does not distract from the question. Never treat a glossy image as evidence that a complex service is suitable for the customer.

6. Choose one next step and make it easy to take

Each route needs one primary outcome. It may be a booked discussion, an internal review, a product page, a request for an estimate or a human handover. Do not ask a person to book a call, join a mailing list, download three guides and give feedback in the same route.

Step 1: Write the primary outcome

Flow	Primary outcome	Customer benefit	Business action after completion	What counts as complete?

Step 2: Offer short, meaningful choices

Buttons or quick replies can be useful when the options are few and mutually clear. They do not automatically improve results. Test whether the labels make sense to someone who has not attended your internal meeting.

Instead of: "What are you interested in?"

Try:

- “Request a quote”
- “Check our service area”
- “Ask a product question”
- “Speak to the team”

Keep an “Something else” or “Speak to the team” option where a customer may have a valid question outside the planned route. Do not force a false answer merely to keep the automation moving.

Step 3: Make every ask proportionate

After each helpful message, ask for the smallest sensible action. Examples include “Choose the service you need”, “Would you like the product link?” or “Is this for a home or business premises?” When contact details are necessary, explain why: “Please add a phone number only if you would like a callback about the survey.”

Check the current platform rules before trying to continue a conversation outside an allowed window. Do not design a series of prompts simply to trigger more replies or avoid those restrictions [4].

7. Design the human handover before launch

A handover is part of the service, not an exception to hide. Your chatbot should stop and alert a person when it cannot safely help. Decide the triggers, the receiving team, the information they need and the manual response route before the first customer sees the bot.

Step 1: Agree your red-light triggers

Trigger	What the bot does immediately	Human owner	Information passed	Customer-facing message
Customer asks for a person or uses a complaint phrase	Stop automated sales questions		Conversation summary and last message	
Urgent safety, safeguarding or emergency wording relevant to your service	Display approved urgent-action message and alert a person		Exact words and contact details only if already provided	

Trigger	What the bot does immediately	Human owner	Information passed	Customer-facing message
High-value, bespoke or contract-sensitive request	Do not quote or promise		Need, stated budget if volunteered, and route history	
Bot has failed to understand after your chosen limit	Stop repeating the same question		Unanswered question and attempted options	
Payment, account access, personal-data or security concern	Do not request more details in chat		Minimal necessary context	
Request outside scope or likely regulatory advice	Offer a human review or a clear limitation		Customer's request and relevant approved documents	

Set a realistic limit for misunderstanding. For many small businesses, one clear rephrase and one alternative-choice prompt are enough before a person reviews it. Test the wording with real team members. An upset customer should not have to type “representative” repeatedly to escape a loop.

Step 2: Prepare the internal handover note

Your sales or support colleague should receive enough context to continue the conversation without making the customer start again. Do not include more personal information than is needed for the task.

Internal handover template

Field	Populate from the chat only where needed
Customer name or reference	
Channel and entry point	
Request in the customer's own words	
Answers to qualifying questions	
Relevant labels	

Field	Populate from the chat only where needed
Last automated message sent	
Handover trigger	
Recommended next action	
Named owner and date/time received	

Step 3: Script the changeover

Be honest that the conversation is moving to a person. Do not promise an immediate reply unless your staffing supports one.

“Thanks — I want to make sure you get the right answer. I'm passing your message and the details you have shared to our team. A colleague will review it through our normal support route. If this is urgent, please use [approved urgent contact method].”

If the customer returns after an automated handover, make it clear whether the team has replied. Do not silently send them back through the first question.

Turn the map into a small, controlled first build

Once every table above is complete and approved, use the following beginner-friendly sequence. The exact buttons will differ between tools, so follow the current help centre for the platform you choose rather than copying a generic tutorial.

1. **Name an owner.** Give one person responsibility for the route, including content changes and failures. Name a deputy.
2. **Create a restricted business account.** Use a business-owned email address, remove former staff access and enable the account protections offered by the service. Keep recovery details with the business, not one freelancer's personal account.
3. **Create one route only.** Add the entry condition, transparent greeting, first helpful answer, qualifying questions, labels and primary next step from this workbook.
4. **Use approved answers.** Paste only content that an authorised colleague has checked. Link to one maintained page rather than copying a changing price list into several chat bubbles.
5. **Add the human exit on every branch.** Include it for unexpected questions, complaints, accessibility needs and failures to understand.

6. **Set the handover destination.** Test that the named person or inbox receives the full context. If nobody is available, make the customer-facing message say so plainly.
7. **Use test data.** Ask colleagues to play different customer roles. Do not test with customer data or production payment details unless your business has authorised that method.
8. **Test difficult cases.** Try spelling errors, a question outside scope, an out-of-area request, a complaint, an urgent request, a request for a person and a request that should not receive an automated answer.
9. **Check the manual fallback.** Turn the test route off or simulate an outage. Confirm the team knows the alternative process and can still serve the customer.
10. **Launch narrowly and review.** Start with the chosen entry point. Review conversations, handovers, wrong answers, unanswered questions and any opt-outs regularly. Pause the route if it creates misleading, unsafe or poor customer experiences.

This sequence reduces avoidable mistakes; it is not a security, privacy or legal-compliance certification. Seek specialist advice where your business, data, sector or customer risk calls for it.

First-launch review and next action

Complete this record after your first controlled test. It turns the checklist into a decision rather than an unfinished idea.

Review question	Evidence or decision	Owner	Review date
Does the opening match the entry point?			
Did every approved test receive a clear next step?			
Did the bot avoid unapproved claims, prices and commitments?			
Did human handover arrive with useful context?			
Did a customer have a clear route to a person?			

Review question	Evidence or decision	Owner	Review date
Were no-fit enquiries handled politely and accurately?			
Were direct-marketing and platform rules checked for this channel?			
Were access, account ownership and the manual fallback checked?			
Decision: revise / limited launch / pause			
One improvement to make before the next review			

Notice and references

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