



ASCENDEA

AI / BUSINESS GROWTH / GUIDE & WORKBOOK

Smart Chatbots for UK Small Businesses — Planning, Launch & Improvement Workbook

A beginner-friendly UK small-business workbook for deciding whether a website chatbot is appropriate, mapping a narrow conversation, selecting tools, launching with human handover, and improving from real evidence.



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

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

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Build a useful, supervised website chatbot without turning your customer service into an experiment.

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

Edition v1.0 · October 2026

Format: practical guide and workbook

A chatbot can answer a routine question, collect the right information, route a request or help a visitor book time with your team. It cannot safely replace judgement, solve every problem or make a weak customer process disappear. Start with one useful job, keep a person in the loop where it matters, and improve the service from real conversations.

This workbook is for UK small business owners and managers with limited technical experience. It suits a local trade business, retailer, professional practice or B2B service firm that wants a more helpful website conversation. It does not promise a particular saving, lead volume, response rate or compliance outcome.

Before you begin

What you will have when you finish

Complete the worksheets as you read. You should end with:

- one defined chatbot job and the customer group it serves;
- a go/no-go decision with known gaps recorded;
- a short conversation flow, triage rules and a human handover route;
- a tool-selection brief, not a pile of subscriptions;
- a limited launch and test plan; and
- a review routine for content, safety and customer effort.

Use a narrow first version

A good first chatbot usually handles a repeatable, low-consequence task. Examples include giving opening times, identifying the right service, collecting the details needed for a callback, directing a buyer to approved information, or offering a booking link.

Fictional example. A Bristol heating firm receives many website messages asking whether it covers a postcode, whether it works on a boiler type and when a survey can be arranged. Its first chatbot asks three short questions, gives only approved coverage information and offers a request-a-callback form. It does not diagnose a fault, give a fixed price, advise on gas safety or book an emergency visit without a person checking the request.

Treat every claimed benefit as something to measure in your own business. A faster bot reply may still create more work if staff have to correct it, if people abandon the chat, or if an unclear handover leaves customers repeating themselves.

Publication and use notice

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1. Decide whether a chatbot is the right answer

The eight-question go/no-go check

A chatbot should remove a known point of friction. If the underlying information is stale, the team has no one to answer escalations, or the request needs human judgement from the first message, fix that problem before adding automation.

Readiness question	Yes / no / unsure	Evidence or action needed
Do the same customer questions recur often enough to justify a guided answer?		
Can we name one clear customer task for the first version?		

Readiness question	Yes / no / unsure	Evidence or action needed
Do we have accurate, approved source information for that task?		
Can a named person own the content and the handover queue?		
Can a customer reach a person when the bot is unsure or the issue is sensitive?		
Can we launch with no automatic promises, payments, pricing changes or account changes?		
Can we test on mobile, keyboard and with realistic customer questions?		
Do we understand what personal data, if any, the chat will collect and where it goes?		

Decision:

Proceed with a limited test / pause and fix gaps / use a simpler website change instead:

Owner and review date:

Choose a job, not a technology

Write the first job in one sentence:

We will help **[customer group]** complete **[one task]** by asking **[only necessary questions]**, giving **[approved information]**, and handing off to **[named team or route]** when **[conditions]** occur.

If that sentence includes “answer anything”, “replace the team”, “make decisions”, or “fully automate”, it is too broad for a first release.

Suitable early job	Boundary to set	Human route
Find the right service page	Do not recommend work that needs an inspection	Reception or service adviser

Suitable early job	Boundary to set	Human route
Check whether an area is covered	Use an approved postcode/area list only	Customer team for exceptions
Collect callback details	State when a person will respond; do not promise a slot unless linked to an approved diary	Shared inbox or CRM queue
Answer opening, delivery or returns questions	Use dated, approved policy content	Customer support for exceptions
Qualify a B2B enquiry	Ask only necessary business questions; do not score people on sensitive traits	Sales or operations owner
Direct a visitor to an appointment request	Show availability from the selected booking system; do not make clinical, legal or regulated suitability decisions	Named staff member

Keep the right work with people

Use the triage table before you design replies.

Type of request	First response	Bot role	Human role
Clear, low-risk, repeatable question	Give an approved answer	Answer or guide	Review content periodically
Missing or ambiguous information	Ask one plain clarification question	Collect context	Take over if still unclear
Complaint, distress, urgency or safety concern	Acknowledge and offer the right route	Avoid diagnosing or arguing	Respond promptly using the business process
Price, scope or availability that depends on facts not in the chat	Explain what is needed for a quote or decision	Collect permitted details	Confirm the actual offer or availability
Account, payment or personal-data request	Use a verified, authorised support process	Direct; do not disclose or change information unless specifically designed and tested	Verify identity and act within authority

Type of request	First response	Bot role	Human role
Legal, medical, financial or other regulated advice	State the limit and offer the approved contact route	Do not give advice	Refer to a qualified person or appropriate service

A chatbot may present a helpful menu or draft wording. It should not claim an answer is certain when it lacks information. An “I’m not sure” route is better than a plausible but wrong reply.

2. Choose the simplest conversation design that works

Rule-based flow or AI-assisted answer?

A rule-based chatbot follows choices and conditions that you set. An AI-assisted chatbot may interpret free-text questions or search a controlled knowledge source. Both need clear limits, testing and an escalation route.

Approach	Good first use	Benefits	Watch for
Rule-based flow	Opening hours, service selection, callback collection, booking request	Predictable wording and paths; easier to test	The flow can become long or brittle if it tries to cover every edge case
AI-assisted answer over approved content	A limited FAQ set where customers phrase the same question in different ways	May handle varied wording and reduce menu clicks	It can misunderstand, invent details or follow hostile instructions in user-provided text
Custom conversational system	A justified, complex use case with technical, security and support capacity	Can integrate with controlled systems and channels	Requires engineering, testing, monitoring and governance; it is not a beginner shortcut

Start with rules where the correct response is known and repeatable. Add AI only when it solves a real customer-language problem that menus and good web pages cannot solve. Do not describe a chatbot as “trained on your data” if it is only searching or being given approved information at the time of a chat.

Map the conversation before opening a builder

Use one map for each customer task. A paper sketch is enough at this stage.

Step	Customer says or does	Bot does	Information used	Exit / handover
1. Welcome	Opens chat	States the purpose and offers 2–4 clear choices	Approved welcome text	Customer selects a task or asks for a person
2. Identify need	Chooses a service or types a question	Asks one relevant question at a time	Service list or approved FAQ	Continue, clarify or hand off
3. Give help	Supplies the needed answer	Gives short, checked information with a relevant link	Approved content with owner/date	Ask if it solved the need
4. Collect details	Requests a callback or quote	Explains why each field is needed and asks only for it	Data-collection notice and form fields	Create the agreed internal task
5. Confirm next step	Completes a route	Says what will happen next without inventing a time promise	Operational process	End, booking link or human queue
6. Recover	Gives an unclear or unsupported response	Offers a small set of choices and a person route	Recovery wording	Human handover or safe exit

Your first flow name:

Visitor's starting question or menu choice:

Information the bot may use:

Things the bot must never answer or do:

Handover owner and target route:

Ask fewer, clearer questions

People leave chats when a bot asks for a life story before it has helped them. Use **progressive disclosure**: offer the minimum information or question needed for the next step, then show detail when it is relevant.

For example, a commercial cleaning company could begin with “Are you looking for regular cleaning, a one-off job, or help with an existing service?” It can ask about the site type only after the visitor selects regular cleaning. It does not need employee names, budget or floor area before explaining what happens next.

Use plain English. Write “Which service are you interested in?” rather than “Please select the relevant service vertical.” Keep each message short. On mobile, avoid long paragraphs and options that look similar.

Give the chatbot a useful voice, not a fake personality

Decide how it should sound: calm, direct, warm, formal, practical. Then write a few rules the team can review.

Voice rule	Good example	Avoid
Say what the service can do	“I can help you find the right service or ask the team to call you.”	“I can solve any problem.”
Be honest about limits	“I do not have enough information to confirm that. I can pass this to the team.”	Pretending to have checked a record or spoken to a colleague
Acknowledge the request	“You need an update on your order. I’ll point you to the quickest route.”	Repeating the customer’s wording without helping
Keep an urgent route clear	“If there is an immediate safety risk, contact the emergency service or the appropriate urgent service.”	Diagnosing or minimising a safety concern
Avoid invented familiarity	“Hello. How can we help today?”	“Great to see you again” unless the system reliably knows that is true and has a lawful basis to use it

3. Make the website chat usable and accessible

A chatbot is part of your website, not an optional visual extra. Test the complete route, including the launcher, open and close controls, fields, buttons, error messages and handover link.

The WCAG 2.2 standard says functionality should be operable through a keyboard interface and that a keyboard user must be able to move focus away from a component.^[^1] Use this as a practical test, not a claim that your site conforms to WCAG.

Practical accessibility test

Test	What to do	Pass condition
Keyboard access	Use Tab, Shift+Tab, Enter and Escape without a mouse	You can open, use and close the chat; focus does not get trapped
Visible focus	Tab through the page and the chat	You can see where the cursor is at every step
Screen size	Try a small phone and a narrow browser window	Buttons, message field and handover information remain usable
Plain language	Ask someone outside the project to follow the flow	They understand each question without internal jargon
Error recovery	Enter an unexpected answer or leave a required field blank	The message explains what is needed and offers a way forward
Time pressure	Leave the chat open, pause and return	The conversation does not force a rushed response without warning
Human route	Use the handover path after an unclear question	The customer can find a real contact option and knows what happens next

Check the chosen provider's accessibility documentation and test the actual installed widget. A vendor statement is not a test of your configuration or your website.

4. Pick a tool stack with a reason

The source material named several chatbot, AI and integration products. They are **examples to investigate, not endorsements or a recommended stack**. Product names, capabilities, prices, data locations, integrations and contract terms change. Use a trial or demonstration with non-sensitive test content before committing.

Questions to ask every provider

1. Which website, messaging or voice channels do we actually need in the first six months?
2. Can we export or delete conversation data and close the account cleanly if we leave?
3. What data will be stored, for how long, in which locations, and under which contract terms?

4. Can we limit staff access by role, turn on multi-factor authentication where available, and see relevant activity logs?
5. How does the system pass a conversation to a person, including the information already collected?
6. What happens when an integration fails, the provider is unavailable or the monthly allowance is reached?
7. Which third-party costs are separate, such as messages, AI use, booking, CRM, telephony or implementation support?
8. Can a non-technical owner safely update content and publish a tested change?

Tool directory from the source material

Starting point	Products named in the original source	Sensible evaluation focus
Messaging-first or social conversation builders	Chatfuel; ManyChat	Confirm required channels, message rules, opt-out handling, staff ownership and how a visitor reaches a person
Website chat and customer-conversation platforms	Tidio; Intercom; Drift	Test the website widget, shared inbox, escalation route, data controls, reporting and support process
Conversational forms and visual builders	Collect.chat; Landbot	Check whether a short guided form solves the problem before adding AI; test the flow on mobile and with accessibility tools
Advanced conversational platforms	Rasa Open Source; Dialogflow CX; IBM watsonx Assistant	Treat these as technical implementation options. Confirm engineering, security, monitoring and support capacity before selecting one
Microsoft ecosystem option in the original source	Microsoft Bot Framework	Do not start a new build from the archived Bot Framework SDK. Microsoft says support tickets for it stopped after 31 December 2025 and points new work towards current alternatives. ^[2]

Starting point	Products named in the original source	Sensible evaluation focus
Integration and scheduling examples	Zapier; Make; Calendly	Map each data transfer, permissions, failure alert, duplicate-event handling and manual fallback before connecting systems

The current official pages confirm that Landbot presents a visual no-code builder, Chatfuel positions itself around messaging channels, and Tidio presents a website customer-conversation platform. Those pages also include marketing claims that are not used as evidence in this workbook.^[3] ^[4] ^[5]

For a bespoke or more complex build, current documentation describes Rasa as an agent platform for AI product teams, Google Dialogflow CX as a platform for conversational interfaces across web, mobile, devices, bots and IVR, and IBM watsonx Assistant as a branded live-chat and channel option.^[6] ^[7] ^[8] Those facts describe product positioning, not suitability, price, privacy compliance or a result for your business.

Make integrations safe before making them clever

Connecting a chat to a CRM, shared inbox or booking service can be useful. It can also send incomplete details to the wrong person, duplicate a record or reveal data through an over-broad connection.

Draw the integration as a sentence before you build it:

When **[event]** happens in **[chat]**, create or update **[specific record]** in **[system]** using **[approved fields]**, assign it to **[owner]**, notify **[team]**, and if it fails, **[manual fallback]**.

Avoid giving a first-version chatbot permission to change prices, issue refunds, alter appointments, access a whole customer database or send external messages without approval. Test duplicate submissions, failed connections and a visitor who changes their mind halfway through.

5. Content, handovers and error recovery

Build a small approved knowledge base

Good chatbot answers come from maintained business information, not a large pile of old documents. Start with the questions that genuinely recur. For each answer, record who owns it and when it needs checking.

Customer question	Approved answer or page	Content owner	Last checked	When to hand off

Keep price lists, service areas, eligibility wording, opening hours, policies and booking instructions under version control appropriate to your business. Remove old content rather than asking a system to guess which version is right.

Design the human handover

A handover should not make customers repeat the whole conversation. Decide the trigger, the context sent, the route, the team owner and what the customer sees.

Handover trigger	Context sent internally	Customer-facing wording	Owner	Manual fallback
Bot cannot match a question after one clarification	Conversation transcript or short summary, subject to your data rules	"I can pass this to the team. What is the best way to contact you?"		
Customer asks for a person	Request and any details already supplied	"I'll connect you with the team."		
Complaint, urgency or sensitive issue	Minimum necessary detail and priority marker	"This needs a person's attention. Here is the quickest contact route."		
Booking/integration failure	Intended action and error reference, not hidden technical detail	"I could not complete that request online. Please use this route or contact us."		

Error-recovery wording

Prepare recovery messages before launch. Do not blame the visitor or make them start again without a choice.

Situation	Plain-language response
The request is unclear	"I may have misunderstood. Are you looking for [option A], [option B], or would you like the team to help?"
The bot does not cover the topic	"I do not have an approved answer for that. I can pass your question to the team."
A form field is incomplete	"Please add [specific information] so the team can deal with your request."
The service is unavailable	"This chat service is not available at the moment. You can [phone/email/use contact page]."
The question is urgent or sensitive	"This needs human attention. Please use [approved urgent route]."

6. SOP: launch a limited chatbot safely

SOP record

Field	Definition
Owner	Named business owner or manager, plus a deputy who can disable the bot
Trigger	A decision to test one defined customer task after the readiness check is complete
Inputs	Approved content, conversation map, named handover route, provider account, test cases, data and security decisions
Output	A limited live chatbot with documented boundaries, an active human route and a review date

Numbered launch steps

- 1. Name the accountable owner.** Give one person authority to approve content, pause the bot and assign failures. Record the deputy and the support contact for the chosen provider.
- 2. Write the one-sentence job.** Keep the first release to one customer task. State what the bot will not do.

3. **Collect approved source content.** Use the current service pages, policies and wording that the owner has checked. Do not paste confidential records or old, unowned files into an AI feature.
4. **Map the conversation and handovers.** Include the happy path, unclear input, urgent/sensitive path, provider outage and request for a person.
5. **Set up a controlled environment.** Use a test account or test version where possible. Give only the access needed for the defined task. Keep credentials out of prompts, chat messages and shared notes.
6. **Configure data fields and notices.** Collect the minimum information needed. Show a clear route to your privacy information where personal data is collected. Record where the data goes and who can see it.
7. **Build rules before AI features.** Add fixed routes and approved answers first. If using an AI feature, restrict it to permitted content and ensure it can hand off instead of pretending certainty.
8. **Test representative cases.** Include common questions, spelling mistakes, empty fields, long messages, unsupported requests, malicious-looking instructions inside user text, duplicate submissions and integration failures. Test the mobile and keyboard route.
9. **Run an internal soft launch.** Ask staff who did not build it to use the chat and report confusing wording, false assumptions and blocked handovers. Fix material problems before external release.
10. **Publish to a limited audience or page.** Avoid launching across every channel at once. Keep a simple way to disable the widget or revert to a contact form.
11. **Monitor the first conversations.** Check the actual handover queue, errors, unanswered questions and time taken by people to finish the work. Do not rely only on the builder dashboard.
12. **Hold the release review.** Decide whether to keep the restricted version, improve a defined item, expand one capability or stop. Record the evidence and the next review date.

Exceptions and human fallback

Pause the chatbot or remove a capability when it gives unsafe, materially incorrect or unauthorised information; exposes personal data; sends a request to the wrong place; fails to hand over; or creates a customer-service problem the team cannot control. Use the normal website contact route while the issue is investigated. Document what happened, correct the source or configuration, retest the affected cases and obtain owner approval before restoring the capability.

7. Privacy, security and lawful follow-up

Data protection is a design task

If your chatbot processes personal data, it is part of your organisation's data processing. The ICO's AI guidance covers accountability, transparency, lawfulness, accuracy, fairness, security, data minimisation and individual rights; it is currently under review following the Data (Use and Access) Act.^[9] Do not rely on this workbook or a provider's marketing page as a compliance assessment.

Before launch, record:

- the purpose for collecting each field and why it is necessary;
- the lawful basis and privacy information needed for your actual processing;
- which organisations are involved, their roles and applicable contracts;
- retention/deletion arrangements, access controls and international transfer considerations where relevant;
- how an individual can exercise rights or ask a question; and
- whether the processing is likely to create high risk and whether a DPIA is required. Seek qualified advice if unsure.

Avoid collecting special category data, payment-card details, passwords, account credentials or detailed health, legal or financial information through a general chatbot unless you have a specific, properly designed and authorised process. A friendly widget does not make sensitive data low-risk.

Security checks for a small business owner

The UK National Cyber Security Centre says AI systems have risks alongside normal cyber security threats, including incorrect outputs, bias, prompt injection and data poisoning. It recommends treating security as a lifecycle concern and understanding accountability, assets, supply chains and incident response.^[10]

Use the following proportionate checks. They reduce risk; they do not guarantee security or compliance.

Control	Beginner-friendly action
Account ownership	Use a business-controlled email and record the owner, renewal date and recovery method
Access	Give people their own accounts; remove access when roles change; use multi-factor authentication if the provider offers it

Control	Beginner-friendly action
Least privilege	Connect only the fields, folders or systems necessary for the first job
Content controls	Use approved, dated sources; do not let an AI answer from unreviewed public or customer-submitted content without safeguards
Credentials	Store passwords and API keys in an appropriate secure system, never in a prompt, chat transcript or shared spreadsheet
Change control	Record meaningful changes to prompts, source content, integrations and permissions; retest affected scenarios
Monitoring	Check errors, handoffs, unusual usage and failed integrations; decide who responds and how quickly
Incident route	Know how to disable the chat, revoke access, preserve necessary evidence and contact the provider or relevant adviser

Treat text in an email, uploaded document or website form as untrusted input. It may try to persuade an AI system to ignore its role or reveal information. A customer message must not become permission to access data, override a policy or take an action outside the chatbot's design.

If the chat leads to marketing follow-up

A website visitor asking for a callback is different from building a prospect list and sending marketing messages. If you use chat data for direct marketing, check the current ICO guidance first. Under PECR, companies and LLPs are generally corporate subscribers, while sole traders and certain partnerships are individual subscribers; rules differ for electronic marketing. UK GDPR can still apply where you process identifiable business-contact data. Corporate marketing emails must identify the sender and give a valid opt-out route, and objections should be respected.^[11]

Do not assume a sole trader can receive cold marketing because the business has a public email address. Do not place people into an automated follow-up sequence merely because they used a general website chat. Record the purpose, lawful basis, notices, consent or applicable exception and suppression process for your actual campaign. ICO guidance in this area is under review, so recheck it before acting.

8. Test the whole service, then measure it honestly

Use a test set that includes awkward cases

A polished demonstration proves only that the demonstration worked. Test the kind of messages that make the real service difficult.

Test case	Expected response	Result / notes
Common question in plain English	Correct approved answer or short route	
Same question with spelling errors	Clarify or route safely; no invented answer	
Very long or multiple-part message	Ask which part to handle first or offer a person	
Sensitive/urgent request	Do not advise beyond scope; offer the human route	
Unsupported request	Honest limitation and route	
Prompt-injection style instruction inside a message	Ignore the instruction; stay within the permitted task	
Duplicate form submission	Avoid duplicate records or flag for review	
Booking/CRM connection unavailable	Explain the next route; create no silent failure	
Keyboard-only session	All controls work and focus can leave the widget	
Mobile session	Fields, buttons and handover are readable and usable	

Keep some suitable test questions out of the design process. Use them after a meaningful content, prompt, model or integration change. Record the number and type of cases; do not turn a small internal test into a public accuracy claim.

Choose metrics that match the task

Do not inherit a generic dashboard target. Define success in a way that includes human work and customer experience.

Measure	Define it before launch	Check alongside it
Helpful outcome rate	Completed the intended safe outcome, using your stated definition	Whether the result was later corrected or reopened
Handover rate	Chats passed to a person because a rule or request required it	Handover quality and response time
Unresolved/failed route rate	Chats that ended without the intended outcome or safe handover	Reason codes and conversation samples
Customer effort signal	A short voluntary question such as "Did this help?"	Drop-off points and complaint themes
Human review time	Staff time to check, correct, route and resolve the request	Any time saved by the automated step
Content gap count	Recurring questions without a current approved answer	Owner and due date for each gap
Cost and usage	Provider, integration and staff-review cost for the period	Budget limits, unexpected use and value actually realised

A simple planning estimate can help you decide what to test:

Potential capacity change = verified reduction in staff time for comparable cases – added review, correction and maintenance time.

This is not automatically cash saved or additional revenue. Work must be reduced, avoided or reallocated in a way that creates a real business benefit. Keep provider costs, implementation time and ongoing ownership visible.

Run a failed-conversation learning loop

Once a week during a limited launch, review a small, appropriate sample of chats with the owner. Group failures by cause: missing content, confusing wording, bad routing, unsupported request, integration fault, accessibility problem or human queue delay. Fix one meaningful issue at a time, then retest it.

Prioritise the questions customers actually ask. The familiar “80/20” idea is a prompt to look for concentration, not evidence that your business will have an exact 80/20 pattern. Let your own permitted conversation data and customer feedback determine what to improve next.

Plan for seasonal changes

A chatbot can become wrong quickly when opening hours, lead times, stock, service areas or policies change. Add reminders before known busy periods, holiday closures, seasonal services, price reviews and staff leave.

Change date or period	Content affected	Owner	Test required	Published / checked

9. Prompt pack for planning and review

These prompts help you create drafts and find gaps. Use only content you are permitted to share. Do not paste passwords, payment details, confidential client records, sensitive personal data or full customer transcripts into a general AI tool. Check every output against your approved source content and have the named owner approve anything customer-facing.

Prompt: cluster recurring customer questions

You are helping a UK small business plan a supervised website chatbot. Based only on the questions below, group them into clear customer intents. For each intent, show: (1) the plain-English customer need, (2) a safe first response, (3) information required from an approved business source, (4) when to ask one clarification question, and (5) when to hand over to a person. Do not invent policy, prices, availability or technical facts. Flag anything that needs human judgement.

Business: [type of business]

Questions: [paste approved, anonymised questions]

Prompt: draft a short conversation flow

Create a simple website chatbot flow for this single job: [job]. Audience: [customer]. Allowed information: [approved sources]. Prohibited actions: [list]. Human handover route: [route]. Write a welcome, no more than four initial choices, one question at a time, concise error recovery and an honest escalation message. Mark every statement that needs owner verification with [VERIFY]. Do not make claims about price, eligibility, timing or outcomes unless supplied in the input.

Prompt: audit a knowledge-base answer

Review the draft answer below against the approved source text. Return a table with: exact claim, supported / unsupported / unclear, source wording, risk if published, and a safer revision. Do not add facts. Treat any missing source as unsupported.

Draft answer: [paste draft]

Approved source: [paste or link only material you are allowed to share]

Prompt: turn failed chats into a review list

Review these anonymised failed or handed-over chatbot conversations. Group the underlying causes into: missing content, unclear language, wrong route, integration issue, customer request outside scope, accessibility/usability, or human-response delay. For each group propose one testable change, its owner, and a test case. Do not infer personal characteristics or make a customer judgement. Keep any uncertain finding marked as a hypothesis.

Conversations: [paste permitted, anonymised extracts]

Prompt: prepare a seasonal content check

Using the business calendar below, list chatbot answers that may become out of date. For each, suggest an owner, source to check, review date, test question and safe fallback wording while information is being updated. Do not invent dates, offers, prices or availability.

Calendar and known changes: [paste]

10. Your one-page chatbot brief

Complete this before buying a subscription or asking someone to build a bot.

Business and customer group:

One customer problem or task:

What the first chatbot will do:

What it will not do:

Approved content sources and content owner:

Information/data it will collect, and why:

Human handover triggers and destination:

Website/messaging channel for the first launch:

Systems it may connect to, fields shared and failure fallback:

Security/privacy questions to resolve before build:

Test cases, including urgent/sensitive and integration-failure cases:

Success measure, baseline and review date:

Decision: build a limited test / change scope / do not proceed yet:

Accountable owner and deputy:

11. Standalone pre-launch checklist

Use this checklist on the day before a limited external launch.

- ☐ The chatbot has one written job, named owner and deputy.
- ☐ Its approved answers, links and service information have been checked and dated.
- ☐ It says what it can help with and does not claim to be a person.
- ☐ It has a clear route for a human, urgent/sensitive request and unsupported question.
- ☐ It does not give regulated advice, confirm uncertain prices/availability or take unauthorised actions.
- ☐ Personal data fields are necessary, explained and routed to the intended system only.
- ☐ Provider account ownership, staff access and recovery method are recorded.
- ☐ Credentials are not in prompts, transcripts or shared notes.
- ☐ AI-assisted answers are restricted to permitted sources and can safely say it does not know.
- ☐ Common, awkward and malicious-looking input cases have been tested.
- ☐ Mobile, keyboard, focus and visible human-handover routes have been checked on the actual site.

- ☐ The CRM, inbox or booking connection has a tested failure and duplicate-submission route.
- ☐ The team knows who checks the queue and what happens outside opening hours.
- ☐ A disable/revert method is available and someone has tested it.
- ☐ The first review date, measures and change-approval process are recorded.

12. Next practical step

Choose one recurring customer question this week. Collect the answer your team currently gives, check it against the real policy or service information, and write the safe human-handover route. If you cannot do those three things yet, do not build the chatbot. Improve the information or process first.

A helpful chatbot earns trust by being clear about what it knows, what it cannot do and when a person will take over. That is a better foundation than trying to make it look clever.

References and verification notes

[^1]: [W3C, Web Content Accessibility Guidelines \(WCAG\) 2.2](#), keyboard accessibility and no-keyboard-trap criteria. Checked 9 October 2026. [^2]: [Microsoft Learn, What is the Bot Framework SDK?](#), which states that the SDK and Emulator are archived and that SDK support tickets stopped after 31 December 2025. Checked 9 October 2026. [^3]: [Landbot, No-Code Chatbot Builder: The Complete Guide](#). Checked 9 October 2026. [^4]: [Chatfuel](#). Checked 9 October 2026. [^5]: [Tidio](#). Checked 9 October 2026. [^6]: [Rasa documentation](#). Checked 9 October 2026. [^7]: [Google Cloud, Dialogflow CX documentation](#). Checked 9 October 2026. [^8]: [IBM Cloud Docs, About watsonx Assistant](#). Checked 9 October 2026. [^9]: [Information Commissioner's Office, Guidance on AI and data protection](#). The ICO says this guidance is under review following changes made by the Data (Use and Access) Act. Checked 9 October 2026. [^10]: [National Cyber Security Centre, AI and cyber security: what you need to know](#). Checked 9 October 2026. [^11]: [Information Commissioner's Office, Business-to-business marketing](#). The ICO says this guidance is under review following changes made by the Data (Use and Access) Act. Checked 9 October 2026.

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