



ASCENDEA

AI / BUSINESS GROWTH / GUIDE & WORKBOOK

Plan Your Sales Chatbot Conversations

A UK-focused practical guide and workbook for small-business owners who want to plan a helpful sales chatbot before choosing software. It covers conversation mapping, concise scripts, entry points, proportionate qualification, tagging, UK messaging considerations, safe handoffs, beginner build steps, testing and weekly improvement.



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Your route through this resource

Start here	3
1. Design a helpful conversation, not a demanding form	4
2. Keep messages easy to read and make room for a reply	5
3. Map the conversation before choosing software	6
4. Write each turn using Hook–Value–Ask	8
5. Give the assistant an honest identity and consistent voice	10
6. Match the first line to the entry point.....	10
7. Choose one home base and check the rules before build	11
8. Qualify respectfully and store only useful information	13
9. Plan follow-up carefully and give people a way out.....	14
10. Use a traffic-light handoff so people know who acts.....	15
11. Build safely: a beginner implementation SOP.....	16
12. Test, learn and maintain a manual fallback.....	18
13. Your launch decision and 10 next steps	19
Publication and use notice.....	20
References and verification notes	21

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 planning workbook for UK small businesses

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Start here

A sales chatbot can answer a simple question, route an enquiry or help a customer take the next step when your team is unavailable. It cannot make an unclear offer useful or make an unsuitable prospect into a good customer. The best starting point is therefore not a software subscription. It is a clear paper plan for a helpful conversation.

This guide helps you map that conversation before you build it. It is written for a UK owner-manager or small team with little technical experience. The examples are fictional teaching examples, not customer results or promised outcomes. A chatbot may save time in one part of a process while adding review work elsewhere. Measure the whole process before making a performance claim.

What you will make

By the end, you will have:

- one chosen customer journey and entry point;
- a short, plain-English opening script;
- three to five useful qualification questions;
- a simple route for people who are not a fit;
- a tagging and human-handover plan;
- a lawful-messaging and security check to complete before launch; and
- a first-test and weekly-review plan.

Keep the first version small

Choose **one** place where customers already contact you, **one** frequent enquiry type and **one** next step. For a local electrician, that might be a website chat that collects the nature and urgency of a job before a person calls back. For a bookkeeping practice, it might help a visitor select “switching accountant” or “ongoing bookkeeping” and request a suitable introductory conversation. For a retailer, it might answer a product-fit question and point to an approved product page.

Do not let the first version quote bespoke prices, make appointments it cannot verify, give regulated advice, make employment or credit decisions, or send messages without a permitted route. It should always have a human fallback.

How to use this workbook

Complete the sections in order. Write brief, honest answers. Where something is unknown, write “**to test**” rather than making it up. You can work on a printed copy or in a separate document.

Important: This is general business education, not legal, data-protection, security or financial advice. Messaging rules and platform policies change. Check the linked official guidance and take appropriate professional advice for your business before launch.

1. Design a helpful conversation, not a demanding form

A form can be the right tool when you need a detailed request. A chat flow is different: it should help someone understand what happens next. Begin with the customer’s need, then ask only for information needed to help or route them.

Think of the bot as a **front-door assistant**. It should welcome, identify the topic, give a useful response and offer a sensible next action. It is not a pretend salesperson, nor a way to collect every possible detail at the first click.

Learn from a good human conversation

Choose a member of your team who handles new enquiries well. Listen to a few suitable calls or read approved messages, without copying confidential information into a tool. Notice the order:

1. They establish why the person has contacted the business.
2. They ask one diagnostic question.
3. They offer a relevant answer, option or route.
4. They ask for contact details only when there is a clear reason to do so.

5. They explain what will happen next.

A good chat flow can follow the same order. It should not claim to be a person if it is automated.

Worksheet: your helpful-service standard

The enquiry type I will start with:

The customer's likely first question or need:

What we can genuinely give before asking for details:

The next step we can reliably offer:

When a person must take over:

2. Keep messages easy to read and make room for a reply

A message is easier to act on when it has one clear idea. Read each proposed message aloud. If it feels long, split it, remove a sentence or use a button where the platform supports it. Do not deliberately imitate a human by adding artificial delays. Deliver messages in an order that makes sense, and let the customer reply before sending a string of new prompts.

This is the **one-thought rule**: one short message, one useful point, then a clear choice or question where a reply is needed.

Give the customer a turn

A useful conversation has turns. After an answer or a choice, pause for the person's reply. Avoid several promotional messages in a row. A customer who does not reply may be busy, unconvinced or unable to continue; silence is not permission to keep sending messages.

Where a platform provides quick replies or buttons, offer a small number of truthful options. For example:

"Which is closest to what you need?"
[Emergency repair] [Planned work] [Not sure]

This is easier to answer than a vague request for a long explanation. It must still include an option such as **“Not sure”** or **“Speak to a person”** when that is appropriate.

A quick script check

Check	Pass condition
One idea	Each message has a single purpose.
Plain language	A customer can understand it without internal jargon.
Truthful choice	Buttons describe options you can really provide.
Customer turn	The flow waits for a reply or selection before continuing.
Escape route	The person can ask for help or stop marketing messages.

3. Map the conversation before choosing software

Do this on paper first. A **happy path** is the simplest sensible route from the first message to a useful outcome. It does not assume every customer is ready to buy. For many small businesses, a good outcome is a qualified callback request, a verified booking request or a visit to the right product page.

Step 1: list your skeleton questions

Write three to five questions your team already uses to decide what should happen next. These should be relevant to service, scope or timing. Avoid collecting sensitive or irrelevant information.

Business type	Useful early questions	Avoid asking for
Plumbing or electrical services	“Is this urgent?” “Is the property in our service area?” “What type of job is it?”	A full story before you know whether you can help.
Accountancy or bookkeeping	“Are you a sole trader, partnership or limited company?” “Is this ongoing work or a one-off query?”	Tax records or identification documents in an open chat.

Business type	Useful early questions	Avoid asking for
B2B IT support	“How many people need support?” “Do you need help with an existing system or a new project?”	Passwords, API keys or confidential network details.
Retail	“Which product are you considering?” “Is it for you or a gift?”	Information unrelated to the order or support request.

A question is useful only if the answer changes the route, the person who responds or the next action. If it does not, remove it.

Step 2: draw the happy path

Use the following template. Start with a real action, not a generic “hello”. Then show the smallest number of steps needed to reach a useful outcome.

Entry point → Contextual welcome → First useful answer → Qualification → Next step → Human/approved destination

Fictional example — a small heating firm:

Website “Get help with a boiler issue” button
 → “I can help direct your request. Is there no heating/hot water, a leak, or something else?”
 → [No heating/hot water]
 → “Is anyone vulnerable at the property, or is there an immediate safety concern?”
 → “Please call the emergency number now if you smell gas or believe there is immediate danger. Otherwise, I can pass your request to the duty team.”
 → Collect only the contact and job details needed for that handoff.

This fictional example does not diagnose a fault or promise a response time. It routes a request safely.

Step 3: find friction

Read the path from top to bottom. Circle anything that asks before it helps, repeats a question, forces a long free-text answer or claims an outcome a team member cannot deliver. Move or remove that step.

Worksheet: first conversation map

Entry point (where did the person click?):

What were they looking at immediately before that click?:

First useful answer or resource:

Question 1 and route it changes:

Question 2 and route it changes:

Question 3 and route it changes:

Successful next step:

Manual fallback if the system is unavailable or uncertain:

4. Write each turn using Hook–Value–Ask

The purpose of an early chat message is usually to earn the next step, not to force a sale. Use this simple sequence:

1. **Hook — context.** Say why this message is relevant now.
2. **Value — help.** Give the answer, link, availability information or route you actually have.
3. **Ask — a small next step.** Invite a reply, selection or appropriate human handoff.

A safe script pattern

Part	What it does	Fictional trades example
Hook	Connects to the page, advert or button that started the conversation.	"Thanks for asking about our boiler-service visits."
Value	Gives a truthful, useful response.	"We cover annual servicing in Leeds and nearby postcodes. I can check whether your area is included."

Part	What it does	Fictional trades example
Ask	Gives a simple, relevant choice.	"Would you like to check a postcode or ask for a callback?"

Do not claim a cancellation, discount, timeslot or stock level unless the system is connected to accurate, authorised information and someone owns that information. If it is not connected, say what will happen instead: "A member of the team will confirm availability."

Make the ask proportionate

A low-friction ask might be a button such as "Check service area", "See the guide" or "Request a callback". It should not disguise marketing consent or make a person feel trapped.

When you need a contact detail, say why. For example:

"If you would like a callback, please leave a number and a suitable time. We will use it to respond to this request. See our privacy information: [link]."

Check your privacy notice and process with an appropriate adviser. If the chat is used for marketing rather than a service request, the rules may be different.

Worksheet: draft the first three turns

Entry context:

Hook:

Value:

Ask / buttons:

What happens for each button choice:

Information requested, why it is needed and privacy link: ____

5. Give the assistant an honest identity and consistent voice

Customers should not have to guess whether they are speaking with a person. A simple disclosure is clearer:

“You’re chatting with the automated assistant for [Business]. I can help with [three tasks]. A member of the team can take over if needed.”

Choose a name only if it helps people understand the role. “Northfield Plumbing Assistant” is usually clearer than an invented personal identity. Match the wording to your business: calm and precise for professional services, friendly and plain for a local retailer, helpful and direct for a trade business. Do not change voice halfway through a flow.

Set boundaries in writing

Complete these sentences before build:

- The assistant may: _____
- The assistant must not: _____
- A person takes over when: _____
- The approved source for answers is: _____
- When the source does not answer, the assistant says: _____

For any AI-generated draft response, require human review where an error could affect a customer, price, safety, contract, regulated matter or reputation. An AI system can produce a plausible but wrong answer. It should never invent policy, availability, product facts or a reason for a decision.

6. Match the first line to the entry point

A person who clicks from a product post, a local-services page and a general contact button has different context. Make a short entry-point list. The first line should acknowledge the action they just took, without pretending to know more than you do.

Entry point	Likely need	Suitable first line	Next route
Product page	Product detail or suitability	“I can help with questions about the [product name] page.”	[Product details] [Delivery] [Speak to us]

Entry point	Likely need	Suitable first line	Next route
Service page	Whether you cover the work	"Are you looking for urgent help or planned work?"	Urgent / Planned / Not sure
Download request	The requested resource	"Here is the guide you requested: [approved link]. Would you like the short checklist as well?"	Checklist / Ask a question
General contact button	Unsure or multiple needs	"What would you like help with today?"	Three agreed categories plus human help

Keep the wording specific but do not use information the person has not knowingly supplied. If you run adverts or tracking, get appropriate advice about cookies, privacy information and audience targeting.

7. Choose one home base and check the rules before build

Start where customers already contact you and where your team can genuinely respond. A website chat, email-linked form, Instagram direct message, Facebook Messenger or WhatsApp can each be appropriate depending on your customers and operational capacity. Do not deploy the same flow everywhere until one version works safely.

Platform and policy check

Each platform has its own policies, account requirements, costs, technical limits and rules about outbound messages. Read current official documentation before implementation. For example, WhatsApp Business Platform rules say that a business can reply without a template within the 24-hour customer-service window opened or reset by a user message; outside that window, approved message templates are required. It also requires an escalation path for automated responses and says businesses are responsible for necessary notices, permissions and consents.¹

That is a platform policy, not permission to send marketing in the UK. Your use must also meet applicable law. Build only after you have checked the policy that applies to your actual account, country, message category and use case.

UK direct-marketing check

PECR and the UK GDPR can apply to business-to-business marketing. The ICO says that companies and LLPs are generally **corporate subscribers**, while sole traders and some partnerships are **individual subscribers**. The electronic-mail rule differs between those categories, but the UK GDPR can still apply where you process identifiable business-contact data. Direct messages via social media fall within the ICO's broad treatment of electronic mail.³

Before any proactive follow-up or campaign:

1. Identify the channel and whether the message is direct marketing.
2. Check the recipient's status. Do not assume a sole trader can be treated like a limited company.
3. For individuals, including sole traders and certain partnerships, confirm that consent or a genuinely applicable exception exists before email, text or direct-message marketing.
4. For corporate-subscriber electronic marketing, identify your business honestly, provide a valid opt-out route, maintain a suppression list and honour objections. Consider the UK GDPR where personal data is involved.
5. Give appropriate privacy information and record the basis you rely on for processing personal data.
6. Stop automated messages promptly when someone opts out, objects or asks not to be contacted.

The ICO marks its B2B and electronic-marketing guidance as under review following the Data (Use and Access) Act. Recheck current guidance before launch. This workbook does not certify compliance.³

Technical passport for a beginner

Before connecting a tool, write down the answer to each item:

Check	What to confirm
Business account owner	A named person owns the business account and can recover it.
Platform permissions	The business has the required account, page, number or messaging approval.
Sender identity	The profile name, contact details and privacy link are accurate.
Cost owner	A named person understands subscription, template, usage and integration costs.
Human coverage	A named person can handle red-light escalations during stated hours.

Check	What to confirm
Data route	You know which tool receives each field and why.
Disable switch	Someone can pause the bot and use the manual process.

8. Qualify respectfully and store only useful information

Qualification should help the customer get to the right route. It should not be a barrier designed to make people disclose more than you need.

Pick a fair “not a fit” question

Choose a business-relevant factor that changes what you can provide. Examples include service area, job type, product compatibility, minimum project scope or whether an appointment is required. Do not build routes around protected characteristics or irrelevant assumptions.

Fictional example — a small B2B IT provider:

“We support organisations using Microsoft 365. Are you looking for help with an existing Microsoft 365 setup, a new setup, or something else?”

If the answer is “something else”, the business can offer a general enquiry route or a useful public resource. It should not insult or simply abandon the person.

Write a polite pivot

Use a short explanation and, where genuinely useful, another route:

“Thanks for explaining. We do not provide that service, so I do not want to waste your time. You can use our general enquiry form for a referral request, or return to the main services page.”

Do not claim that a third-party service is suitable unless you have a basis for that statement. Do not send an unqualified person into a marketing sequence merely because they are not ready to buy.

Use tags as working notes, not labels

A tag should say something operationally useful, such as **Service: planned maintenance**, **Area: Leeds**, **Route: callback requested** or **Urgency: same-day review needed**. It should be accurate, understandable to a colleague and deleted according to an agreed retention period.

Avoid tags based on health, ethnicity, political views, religion, inferred vulnerability or other sensitive information unless there is a clear lawful basis, real necessity and suitable expert advice. Do not use tags to make solely automated decisions with significant effects on people.

The ICO's AI and data-protection guidance covers accountability, transparency, lawfulness, accuracy, fairness, security, data minimisation and individual rights. Its guidance is also under review; use it as a starting point, not as a compliance guarantee.⁵

Worksheet: qualification and tagging plan

Question or choice	Why this is needed	Route or tag created	Who can see it	Review/delete point

Our polite “not a fit” wording:

Information we will not ask for in chat:

9. Plan follow-up carefully and give people a way out

A follow-up can be helpful where someone has actively asked for a service response, a booking or a permitted marketing message. It must be relevant, accurate and allowed by both the platform and applicable law. Do not build a sequence around a fixed “nudge” deadline simply because an old template says so.

For a customer-service request, the next message might say:

“You asked us to check availability. We have passed your request to the team. If you no longer need help, reply STOP or use [the agreed route].”

For marketing, use a route that has been assessed for PECR, UK GDPR and platform policy. The message must not disguise the sender, must make opting out usable and must be stopped if the person objects. Keep a suppression list and test it before launch.³

Follow-up decision table

Situation	Can the bot follow up?	What to do first
Customer asks for a callback	Usually a service follow-up may be appropriate, subject to your notice and process.	Confirm the request, send it to the named owner and log the handoff.
Person abandons a marketing flow	Not automatically.	Check the channel, consent or applicable exception, platform policy and opt-out status.
Person says “stop”, “unsubscribe” or objects	No marketing follow-up.	Suppress promptly and tell the team.
The bot has no answer	Do not guess.	Offer a human route and record the unanswered question.

10. Use a traffic-light handoff so people know who acts

Automation should make the human handoff better, not hide it. Decide the trigger, the named owner and the information a person needs before you launch.

Status	Bot action	Human action	Typical triggers
Green	Answers approved FAQs or routes a routine request.	Review periodically, not necessarily live.	Clear FAQ; normal product or service route.
Amber	Collects the minimum approved context and alerts the right queue.	Respond within your stated working process.	Complex request; high-value enquiry under your own definition; requested callback.

Status	Bot action	Human action	Typical triggers
Red	Stops automated advice, confirms a person will take over and gives the safe fallback.	Take ownership promptly according to your process.	“Human” or complaint; safety issue; personal-data concern; bot does not understand after an agreed limit; urgent service need.

Do not use an arbitrary purchase total as the only red-light trigger. Risk, dissatisfaction, urgency and uncertainty can matter more.

Send a useful handoff note

Give the colleague context, not speculation:

```
Customer name or reference: [only if collected]
Reason for contact: [their selected topic]
Answers already given: [approved summary]
Relevant choice/tag: [e.g., “planned work”, “callback requested”]
Stuck point or concern: [e.g., “asked for a human”]
Last message and time: [accurate record]
Owner and next action: [named person / queue]
```

Do not copy unnecessary sensitive details into alerts. A handoff is not permission for a person to ignore a stated preference, promise something the business cannot deliver or restart marketing after an opt-out.

11. Build safely: a beginner implementation SOP

Use this sequence after the paper map is agreed. Keep the first launch small and supervised.

SOP card

SOP field	Detail
Owner	The business owner or a named operations lead; a named colleague for customer handoffs.
Trigger	The paper conversation map, legal/policy checks and approved FAQ content are complete.

SOP field	Detail
Inputs	Approved scripts, entry-point list, qualification rules, privacy link, data map, escalation contacts and test cases.
Output	A tested, limited chatbot flow with a manual fallback and a documented release decision.
Exception / human fallback	Pause the bot, use the normal manual enquiry route, notify the named owner and investigate before restarting.

Numbered build steps

1. **Choose the smallest use case.** Write it in one sentence. Example: “Route website visitors asking about annual boiler servicing to the correct team without booking automatically.”
2. **Name the owner.** Decide who can edit the flow, who reads escalations and who can switch it off. Never share a single personal login among staff.
3. **Prepare approved information.** Use current product pages, service areas, terms and FAQs. Remove old prices, obsolete offers and unverified claims.
4. **Create the routes.** Enter your entry-point welcome, questions, help text, not-a-fit pivot, human handoff and stop/opt-out handling.
5. **Set boundaries.** Configure the bot so it does not take prohibited actions, invent answers or access unnecessary systems. If it uses AI, give it only approved knowledge and an instruction to say it does not know rather than guess.
6. **Set up security basics.** Use business-owned accounts, give people only the access they need, turn on multi-factor authentication where available, remove access when a person leaves, keep devices and software updated, and keep recoverable backups for important configuration and records. The NCSC’s small-organisations guidance covers protecting accounts and devices, backups and scams; use the current guidance to tailor your controls.⁶
7. **Test with permitted test data.** Do not paste real customer records, passwords, payment details or sensitive personal information into an unassessed tool. Test ordinary, unclear, off-topic, unhappy and opt-out messages.
8. **Test the failure route.** Switch off an integration or use a nonsense question. Check that the bot routes safely to a person instead of looping or inventing an answer.
9. **Check the whole customer view.** Test the actual entry link, mobile display, links, privacy notice, stated service hours, handoff alert and opt-out route.

10. **Release to a small, appropriate group only after sign-off.** Record what was tested, who approved the content and the date. A successful demonstration is not proof that the system is ready for every customer or channel.

When a DPIA or specialist review may be needed

If personal-data processing is likely to result in high risk to people, assess whether a Data Protection Impact Assessment (DPIA) is required **before** processing begins. The ICO's DPIA guidance explains the process and gives examples of high-risk processing.⁷ A DPIA is not a badge of compliance; the purpose, lawful basis, data minimisation, security and safeguards still need to be appropriate. Seek suitably qualified advice where risk, a contract or sector rules require it.

12. Test, learn and maintain a manual fallback

Treat launch as the beginning of learning, not the end of work. Review a small, permitted sample of conversations at a planned interval. Look for the point at which people get stuck, choose “not sure”, ask for a person, receive an incorrect answer or abandon the route.

Do not treat a small test as a conversion promise. Record the number and kind of sessions, the time period, the changes made and what you did not measure. Include human correction and follow-up time when judging whether the workflow helps.

Weekly review

Review question	Evidence to examine	Possible responsible action
Where did people leave?	Conversation step and route, not a vague overall percentage.	Clarify, remove or reorder one question.
Which questions were not understood?	Unanswered or repeated requests.	Improve approved wording or add a human route.
Did the bot make a material error?	Logged example, impact and correction.	Pause the route if needed; correct the source and retest.
Was human review manageable?	Time, queue and unresolved contacts.	Change coverage or narrow the scope.
Did anyone opt out or complain?	Opt-out log, complaint and suppression record.	Stop relevant messages; fix the process before continuing.
Did policy, pricing or source content change?	Named owner's update check.	Update content, test and record the change.

Change control

Keep a simple record for any meaningful change:

Date	What changed	Why	Tests rerun	Owner	Decision

A refreshed prompt, connected data source, new platform route or changed offer can change how the system behaves. Retest the relevant path and keep the manual route available.

13. Your launch decision and 10 next steps

Do not launch because the screen looks finished. Launch when the route is understandable, the owner is named, tests are documented and a human can take over.

Launch decision

Use case and channel:

What the bot is allowed to do:

What it is not allowed to do:

Named owner / handoff cover:

Privacy, PECR and platform checks completed by:

Security and access checks completed by:

Test cases passed / unresolved issues:

Manual fallback:

Decision: ☐ Start limited test ☐ Revise ☐ Seek specialist advice ☐ Do not launch

Decision owner and date:

10 practical next steps

1. **Audit:** Measure when and how you currently respond to this one enquiry type. Do not call a delay a lost sale unless you have evidence.
2. **Paper prototype:** Draw the entry point, happy path, alternative routes and manual fallback.
3. **Human script:** Write the three to five questions your best team member actually uses.
4. **Formula check:** Rewrite the opening turn using Hook–Value–Ask and the one-thought rule.
5. **Choose one home base:** Use the channel where suitable customers already contact you and your team can respond.
6. **Define qualification:** Choose a fair, business-relevant early question and write the polite not-a-fit route.
7. **Complete the technical passport:** Check account ownership, platform requirements, privacy information, policy rules, costs and handoff coverage.
8. **Build only the agreed path:** Use approved information and keep prohibited actions out of the first version.
9. **Test the difficult cases:** Include unclear requests, complaints, opt-outs, a request for a person and an unavailable system.
10. **Launch narrowly and review:** Record the evidence, improve one meaningful issue at a time and pause a route that is unsafe, misleading or non-compliant.

Publication and use notice

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

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This finished edition is available as a free Ascendea resource. It does not represent legal, data-protection, security, financial or professional advice, and it provides no compliance guarantee.

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Official sources below were checked on **9 October 2026** for the specific platform, UK privacy/messaging and security points in this edition. Platform features, prices and guidance can change; recheck them before implementation.