



ASCENDEA

AI / BUSINESS GROWTH / PROMPT PACK

Website Chatbot Implementation Prompt Pack

A beginner-friendly, UK-focused workbook of 45 structured AI prompts, a controlled implementation SOP, checklists and working pages to help small-business owners assess, plan, launch and improve a narrow website chatbot safely.



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ASCENDEA EDITION · OCTOBER 2026 · v1.0
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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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A practical workbook for UK small businesses

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Edition v1.0 · October 2026

A website chatbot can make it easier for visitors to find routine information or reach the right person. It is not a promise of instant support, more sales, lower costs or a hands-free business. This workbook helps you decide whether a chatbot is useful, define a small safe first job, write and test its content, and review what happens afterwards.

This is for owners and managers of UK small businesses with limited technical experience: a trades business, a local retailer, a professional practice, or a small B2B service firm. You do not need to write code to use the prompts. You do need to know your customer process and be willing to check the output before it goes live.

How to use this workbook

Start with prompts 1–5. If the case is weak, stop or choose a simpler website improvement. If it is promising, work through the next sections in order. Copy one prompt at a time into an AI assistant, replace the square brackets with your own **non-sensitive** context, and save the answer in your decision log.

Do not assume an AI answer is correct because it sounds confident. Check it against your real FAQs, policies, prices, delivery areas, booking rules and supplier documentation. Ask a colleague who deals with customers to review it. Test the final chatbot with realistic questions before customers see it.

Useful boundary: begin with information or an internal draft. Do not let a first chatbot send commitments, alter orders, quote bespoke prices, give legal/medical/financial advice, make hiring or credit decisions, or take another consequential action without an explicitly designed and tested human approval step.

Prepare a safe briefing

Complete this briefing once, then reuse only the relevant parts in each prompt. Use fictional or redacted examples whenever possible. Do not paste passwords, API keys, card data, account logins, full customer records, health information, complaint files, or confidential contracts into a general AI tool.

Item	Your notes
Business and customer type	_____
The one customer task you may improve	_____
Typical questions and current answer source	_____
Hours when a person is available	_____
Current website and connected systems	_____
Information the chatbot must never collect or disclose	_____
A named owner for content and a named person for escalations	_____
The manual fallback if chat is unavailable	_____

A simple decision rule

A chatbot is a better candidate when visitors repeatedly ask the same low-risk question, the business already has a correct answer, and a person can take over when needed. It is a poor starting point when every enquiry requires judgement, the source information is unreliable, or an incorrect answer could harm someone or create a binding commitment.

Situation	Sensible first approach	Human boundary
Opening hours, service areas, standard delivery or appointment-preparation questions	A short menu or rule-based flow using approved answers	Escalate anything not on the approved list
Visitors ask the same questions in different words and you have a maintained FAQ	Consider a constrained AI answer over approved content, with clear fallback	Review answers before expanding coverage
A request needs a bespoke quote, diagnosis, complaint resolution, refund exception or professional judgement	Use chat to collect a simple request or offer contact options	A person decides and replies
The visitor shares sensitive, urgent or safety-critical information	Give a clear safety message and an appropriate human or emergency route	Do not attempt automated advice or triage

UK privacy, marketing and security before you build

A chatbot may process personal information even when it only collects a name, email address, chat transcript, device data or tracking information. Before using personal information, identify and document the purpose and lawful basis, and include both in your privacy information. Use only the information that is needed for the stated task. The ICO's AI guidance is currently under review following changes to the Data (Use and Access) Act, so check the current official guidance before launch. [1](#)

If your proposed processing is likely to result in a high risk to people, assess whether a Data Protection Impact Assessment (DPIA) is required before you proceed. A DPIA is a risk-assessment process, not a compliance badge. Obtain appropriate data-protection advice for an uncertain or higher-risk use case. [3](#)

If the chatbot will send follow-up marketing by email, text or social direct message, treat that as a separate decision. The ICO says corporate subscribers can receive B2B electronic marketing without PECR consent, provided the sender does not conceal their identity and gives a valid opt-out route. Sole traders and some partnerships are individual subscribers; electronic marketing to them needs specific consent or the soft opt-in. If you cannot tell which applies, take the more protective approach. UK GDPR can still apply when business contact data identifies a person. Keep a suppression list and honour objections. [4](#)

Protect the accounts that administer the website, chatbot, CRM and email. Turn on the strongest suitable multi-factor authentication available, give each person only the access they need, remove access promptly when their role ends, and keep credentials out of prompts and shared documents. A cloud supplier handles some security, but you remain responsible for choosing and configuring the service securely and deciding what data to put into it. Keep a copy of your approved FAQ, configuration notes and manual fallback outside the chatbot platform. This is practical risk reduction, not a guarantee of security or compliance. [5](#) [7](#)

Prompt pack

1. Assess the customer need

1. Customer-service pattern assessment

Context to provide: your 10–20 most common questions; when they arrive; current reply times; opening hours; which are routine; and examples of complaints or praise about availability. Do not include identifiable customer transcripts.

Prompt:

Review the customer-service pattern below. Separate questions into: (a) safe for a website chatbot using an approved answer, (b) suitable only for a chatbot that gathers details and hands over to a person, and (c) human-only. Explain your reasoning in plain English. For each category, show the source information that must be accurate before launch, an escalation trigger, and one manual fallback. Do not estimate savings or claim that a chatbot will improve satisfaction. Ask me for any missing operational detail. [Paste my anonymised pattern.]

Human check: compare every proposed automated answer with the current policy owner.

2. Capacity and cost assumptions

Context to provide: approximate weekly time on repetitive questions; who does the work; current cost or internal time value; peak periods; and existing software costs.

Prompt:

Help me make a cautious planning model for a small website chatbot. Use the figures below as assumptions, not facts. Show the current repetitive-work time, possible time that might be affected, human review time, one-off setup work, recurring supplier costs, and uncertainty. Give a low, middle and high scenario without calling any result a saving, profit, ROI or payback until measured. Tell me what data I should collect during a pilot to replace the assumptions. [Paste my figures.]

Human check: keep capacity released separate from cash saved; a quicker answer may create capacity without reducing payroll.

3. Customer fit and acceptance

Context to provide: customer groups; common devices or accessibility needs you know about; purchase complexity; relationship expectations; and reasons people currently contact you.

Prompt:

Assess whether a short website chat option is likely to be helpful for these customer groups. Do not make claims about age, preferences or behaviour without evidence. Identify where a visible human-contact choice matters, what language may confuse visitors, and a small test that would reveal whether the chat option is welcome. Recommend a limited first audience and an alternative if the chatbot is not suitable. [Paste my context.]

Human check: do not make customers prove they can use chat; keep phone, email, form or in-person routes appropriate to your business.

4. Business readiness review

Context to provide: website platform; who can edit content; available owner time; budget limit; current FAQs; support coverage; systems you may connect; and gaps.

Prompt:

Create a readiness review for this proposed chatbot. Mark each area as ready, needs work, or unknown: approved content, accountable owner, human handover, website access, supplier selection, privacy information, security access, testing, monitoring and manual fallback. Give the next smallest action for every gap. Recommend whether to proceed with a limited pilot, pause, or choose a non-chatbot improvement. [Paste my context.]

Human check: a missing FAQ owner or no handover route is a reason to pause, not a problem to hide with better wording.

5. Customer-journey placement

Context to provide: how visitors find you; key pages; enquiry, booking or checkout steps; moments of confusion; and where a person currently helps.

Prompt:

Map the visitor journey described below. Identify only the stages where a chatbot could remove a specific friction point without blocking access to a person. For each candidate point, state the visitor question, approved answer or action, risk, escalation route, and how I could observe whether it helped. Include one option that improves the page itself rather than adding chat. [Paste my journey.]

Human check: do not place a chat pop-up over essential forms, accessibility controls or checkout information.

2. Select the simplest suitable approach

6. Rule-based versus AI-assisted chat

Context to provide: business type; routine questions; answer sources; budget range; ability to maintain content; and what must remain human-led.

Prompt:

Compare a menu/rule-based chatbot with a constrained AI-assisted chatbot for this use case. Use a table covering answer control, content maintenance, error risk, handover, integration need, supplier questions, and suitability for my first release. Recommend the simplest option that meets the stated task. Do not name a supplier or claim one approach is always better. [Paste my context.]

Human check: a rule-based flow is often easier to inspect when questions and answers are stable.

7. Feature priority

Context to provide: up to three business objectives; current pain points; team capacity; required human routes; and a list of “nice to have” ideas.

Prompt:

Turn this wish list into a first-release feature list. Put each item in now, later, or do not do. For every “now” item, give the visitor need, business owner, data needed, failure mode, human fallback and simple measure. Keep the first release limited to one customer task. Explain what I should deliberately exclude. [Paste my context.]

Human check: do not add lead scoring, personalisation, language expansion and complex integrations merely because the platform offers them.

8. Supplier comparison brief

Context to provide: two or three suppliers you are considering; website platform; budget; required features; data concerns; and internal support ability.

Prompt:

Make a supplier-comparison worksheet for the options below. Do not assume their features, prices, data terms or integrations are current. For each requirement, write the exact question I must verify in the supplier’s current documentation or contract: website installation, user roles, MFA, data location and retention, model/provider use of data, export/delete options, integration permissions, analytics, accessibility, support, usage limits, pricing and exit plan. Leave evidence and decision columns blank for me. [Paste suppliers and requirements.]

Human check: check current documentation yourself; sales pages and AI summaries are not enough.

9. Integration assessment

Context to provide: current CRM, booking tool, stock system, email platform, payment tool and website; what data would flow; and who owns each system.

Prompt:

Draw a plain-English integration map for the systems below. For each proposed data flow, identify the sender, receiver, minimum data fields, purpose, owner, access permission, failure outcome, log or evidence needed, and manual route. Recommend a first version with the fewest connections. Treat passwords, tokens and customer data as out of scope for this prompt. [Paste my systems.]

Human check: start by linking to a form or inbox if a live CRM or payment integration is unnecessary for the first task.

10. Evidence-led business case

Context to provide: baseline enquiry numbers; repeat-question volume; costs; current website conversion or booking data if available; supplier estimates; and important unknowns.

Prompt:

Create a one-page decision brief from these figures. Separate observed data from assumptions. Define the customer problem, proposed narrow task, expected operating cost, possible benefits to test, risks, manual fallback, pilot decision date, and stop/continue criteria. Do not use an ROI, conversion or break-even claim unless the required figures are clearly labelled as illustrative assumptions. [Paste my figures.]

Human check: “we do not yet know” is a valid result.

3. Plan a controlled implementation

11. Conversation-flow design

Context to provide: one frequent question; approved answer source; likely follow-up questions; exceptions; handover channel; and business hours.

Prompt:

Design a short conversation flow for the one enquiry below. Use a numbered sequence with the visitor's likely wording, chatbot response, decision point, approved information source, and escalation wording. Include an "I am not sure" path, an urgent/safety path where relevant, and a route to a person. Do not invent business policy or answer a question not supported by the approved source. [Paste my enquiry and source.]

Human check: test the flow with a colleague using awkward, incomplete and misspelled questions.

12. FAQ knowledge-base preparation

Context to provide: 10 or more real questions and your current answers; relevant pages or policy owners; and uncertain/outdated answers.

Prompt:

Convert these FAQs into a chatbot knowledge-base draft. Group duplicates, write each answer in clear UK English, identify the source and content owner, include "last checked" as an empty field, and flag any answer that needs policy confirmation. For each topic, state when the chatbot must hand over rather than continue. Do not add facts or make up missing answers. [Paste my FAQs.]

Human check: only publish questions that have an accountable owner and current source.

13. Service-script adaptation

Context to provide: two or three existing service replies; brand tone; prohibited wording; current contact routes; and what a person needs to know at handover.

Prompt:

Rewrite these customer-service replies for a website chatbot. Keep the facts, reduce unnecessary language, avoid promises about timing or outcomes, and make the next step clear. For each reply, provide: a concise chat version, a clarification question if information is missing, a handover phrase, and a note of any claim that a human must verify. Preserve my factual limits and brand tone. [Paste my scripts.]

Human check: do not turn a courteous script into an automated commitment.

14. Staged implementation plan

Context to provide: owner availability; decision-makers; busy periods; website access; supplier lead times; content gaps; and scope.

Prompt:

Build a beginner-friendly staged plan for this one-task chatbot. Use five stages: prepare, configure, test internally, limited release, and review. For each stage give owner, input, output, decision point, dependency and exception/fallback. Give timing only as an illustrative planning range and show what could lengthen it. Do not assume a fixed launch date. [Paste my context.]

Human check: do not schedule customer testing until content, handover and privacy decisions are ready.

15. Phased launch design

Context to provide: visitor volumes; customer segments; seasonality; first task; monitoring ability; and how to disable the widget.

Prompt:

Propose a phased launch for this chatbot. Start with a limited audience or low-risk page, then set criteria for expanding, pausing or switching it off. Include what to monitor daily in the first period, who receives escalations, how visitors can choose a person, and how to preserve the existing manual route. Do not set performance targets without a baseline. [Paste my context.]

Human check: a limited release is not a hidden experiment; be clear about what the chat can and cannot do.

16. Failure-mode review

Context to provide: task; connected systems; customer consequences; common bad inputs; and current manual process.

Prompt:

Create a failure-mode register for this chatbot. Include wrong or stale answer, misunderstood question, unavailable platform, duplicate submission, failed integration, unauthorised data exposure, prompt injection in user-supplied text, unexpected cost, missing handover and staff absence. For each, state prevention, detection, immediate action, owner, customer message and manual fallback. Add any risk that is specific to my business. [Paste my context.]

Human check: if the impact of a wrong answer is serious, do not automate that decision.

17. Team training plan

Context to provide: roles; who updates content; who takes over chats; support hours; technical comfort; and escalation types.

Prompt:

Create a short training plan for the roles below. Include what each role needs to know, a practice scenario, where to record an issue, who can change content, when to escalate, and how to use the manual fallback. Use plain English and avoid technical jargon. Include a sign-off question that confirms understanding without treating it as a compliance certification. [Paste my team context.]

Human check: train the people who actually answer customer questions, not only the person who installed the widget.

4. Write useful, controlled chat content

18. Brand voice translation

Context to provide: values; three samples of existing copy; customer language; words to use/avoid; and any regulated or sensitive boundaries.

Prompt:

Create a small chatbot style guide from this material. Include greeting tone, sentence length, words to avoid, how to say “I do not know”, how to hand over, and five approved examples. Keep language clear and respectful. Do not imitate a named person or claim a human is replying when it is automated. [Paste my brand material.]

Human check: plain clarity matters more than a clever personality.

19. Welcome-message options

Context to provide: page purpose; visitor intent; one useful chat task; human alternative; and mobile constraints.

Prompt:

Draft three brief welcome messages for this webpage. Each must explain one thing the chat can help with, offer a clear human-contact alternative, and avoid pressure, unsupported urgency or claims about instant availability. Give a hypothesis for each option and a simple, privacy-aware way to compare them. [Paste my page context.]

Human check: keep a welcome message optional and easy to dismiss.

20. Response-template set

Context to provide: five typical scenarios such as availability, service area, booking preparation, returns, troubleshooting or product information; approved answer source; exclusions.

Prompt:

Draft a response template for each scenario below. Each template must include a concise answer from the approved source, one clarification question only if necessary, a link or next step, and a handover trigger. Flag facts that need checking and leave placeholders rather than inventing them. Do not push a sale when the visitor is seeking support. [Paste my scenarios and sources.]

Human check: check links, prices, dates and availability immediately before publication.

21. Escalation and handover protocol

Context to provide: human channels; business hours; response expectations you can truly meet; urgent issues; case types; and information a staff member needs.

Prompt:

Write a chatbot handover protocol. Specify the trigger, information the chatbot may collect, consent or privacy wording that may be needed, where the conversation goes, owner, customer acknowledgement, out-of-hours wording, urgent/safety route and manual fallback. Keep it realistic: do not promise an immediate response unless I can deliver it. [Paste my context.]

Human check: check that the receiving inbox or team can actually see and act on the handover.

22. Conversation starters

Context to provide: page purpose; visitor's likely question; real value proposition; and allowed tasks.

Prompt:

Create five optional conversation starters for this page. Each should help a visitor self-select a useful, low-risk task rather than use a vague sales hook. State the intended visitor question and the next approved step. Exclude manipulative wording, false scarcity and claims that cannot be evidenced. [Paste my context.]

Human check: choose one or two starters for the first release, not all five.

23. Privacy-conscious personalisation

Context to provide: data already lawfully available; why it is needed; visitor expectations; segments; and information to exclude.

Prompt:

Design the minimum personalisation approach for this chatbot. For each proposed data point, state purpose, necessity, source, retention question, visitor explanation, risk and a no-personalisation alternative. Prefer a visitor-selected option, such as “Are you an existing customer?”, over hidden profiling. Do not recommend using sensitive information or inferred characteristics. [Paste my context.]

Human check: personalise only when it gives a clear visitor benefit and your privacy position supports it.

24. Cross-channel consistency

Context to provide: website, email, phone, social, in-person, booking and other channels; current key messages; and channel-specific constraints.

Prompt:

Create a message-consistency checklist for my chatbot and other customer channels. Show the shared facts that must match, the places where conversational wording may differ, content owners, review dates and a procedure for correcting a conflict. Include a check that marketing follow-up is assessed separately from service messaging. [Paste my channels.]

Human check: use one approved source for material facts wherever practical.

5. Improve from real evidence

25. Practical metrics framework

Context to provide: first task; current baseline; platform reports available; support standards; and owner time.

Prompt:

Design a small weekly chatbot review dashboard for this task. Include visitor question category, unanswered or handover rate, correction rate, human-review time, technical failures, customer feedback, cost and any business outcome that can be measured fairly. For every metric, define numerator, denominator, source, review owner and limitation. Do not supply generic industry benchmarks. [Paste my context.]

Human check: a high number of conversations is not necessarily a useful outcome.

26. Conversation-review method

Context to provide: anonymised sample of chats; categories; known issues; customer feedback; and who can review responsibly.

Prompt:

Create a repeatable conversation-review process for this chatbot. Define a safe anonymised sample, review questions, categories for outcome, error, missing content, unclear language, escalation and technical issue. Include a prioritisation rule based on risk, frequency and customer impact. Do not use chat transcripts for new purposes without considering the privacy position. [Paste my context.]

Human check: record the sample and selection method; do not cherry-pick only good chats.

27. Controlled change test

Context to provide: one possible change; baseline period; traffic volume; key outcome; and operational constraints.

Prompt:

Plan a simple, controlled comparison of one chatbot change. State the hypothesis, exact change, primary measure, guardrail measures, baseline, observation window, audience, stop condition and decision rule. If volume is too low for a meaningful comparison, recommend qualitative review instead. Do not claim statistical certainty from a small sample. [Paste my context.]

Human check: change one meaningful thing at a time and retain a rollback copy.

28. Continuous-improvement routine

Context to provide: team size; time available; change authority; release method; and reporting cadence.

Prompt:

Design a lightweight continuous-improvement routine for this chatbot. Include weekly issue capture, monthly content review, change approval, version log, retesting, stakeholder update, rollback and retired-content review. Assign an owner and a backup for each stage. Keep it achievable for a small business. [Paste my context.]

Human check: no change goes live merely because an AI suggested it.

29. Lead qualification with care

Context to provide: ideal enquiry; minimum information genuinely needed; disqualifiers; sales handover; and privacy wording.

Prompt:

Draft a short lead-qualification path that asks only the minimum helpful questions. For each question, explain why it is needed, whether it is optional, how the answer is used, where it goes and the human next step. Avoid questions about sensitive characteristics and do not make eligibility, credit, employment or other high-impact decisions automatically. [Paste my context.]

Human check: treat a lead form and marketing follow-up as separate privacy and marketing decisions.

30. Capability-expansion roadmap

Context to provide: current live task; evidence so far; new requests; team capacity; system dependencies; risks.

Prompt:

Create a staged roadmap for possible chatbot expansion. Put each idea in maintain, validate, pilot, defer or reject. For every pilot candidate, state required evidence, data, owner, integration, human control, cost question, risk and rollback. Use actual findings from the current chatbot; do not assume business growth or customer demand. [Paste my context.]

Human check: maintain the first task well before taking on a second.

6. Consider advanced options only when justified

31. Language-support plan

Context to provide: visitor languages; evidence of need; current translated content; support staff language coverage; and critical information.

Prompt:

Plan language support for this chatbot. Prioritise using actual visitor need and ability to maintain accurate content. For each language, identify approved source content, translation/review owner, handover support, test cases, legal or safety content needing specialist review, and a clear fallback when help is unavailable. Do not assume automated translation is sufficient for important information. [Paste my context.]

Human check: do not launch a language route that cannot be supported by accurate content or a suitable human fallback.

32. Integration enhancement review

Context to provide: current chatbot scope; systems; proposed new connection; task; data fields; and expected benefit.

Prompt:

Assess whether this new integration is justified. Map the existing manual route and the proposed automated route. List minimum permissions, data fields, API or supplier documentation to verify, error handling, duplicate prevention, customer impact, audit evidence, manual fallback and test plan. Recommend “do now”, “prototype safely”, “defer” or “do not integrate” with reasons. [Paste my context.]

Human check: never paste tokens or secrets into this prompt.

33. Customer-profile enhancement

Context to provide: currently held data; permitted purpose; retention approach; segment idea; and customer benefit.

Prompt:

Evaluate this proposal to build a richer customer profile from chat. Start with whether the visitor benefit is clear and whether less data could achieve it. Identify purpose, data-minimisation questions, lawful-basis and transparency questions to take to an appropriate adviser, access limits, retention/deletion questions, bias risks, and a simple non-profiled alternative. Do not treat this as legal advice or a compliance approval. [Paste my context.]

Human check: greater detail about a person is not automatically better service.

34. Automation-expansion screen

Context to provide: repetitive processes; process owner; inputs; outputs; error consequences; and current manual fallback.

Prompt:

Screen these additional processes for chatbot-assisted automation. Score each as low, medium or high operational risk and explain the reason. Consider data sensitivity, error consequence, reversibility, authority required, volume, integration complexity, human review and manual fallback. Recommend one small, reversible candidate or explain why none should proceed. [Paste my processes.]

Human check: keep actions internal and reviewable before allowing external changes.

35. Seasonal-content plan

Context to provide: peak periods; seasonal services or stock; closing dates; frequently changing information; and content owners.

Prompt:

Create a seasonal chatbot content calendar. Include each update, exact source, owner, approval date, publication date, expiry/review date, test question and rollback action. Flag information that should never be guessed, such as availability, delivery times, prices or emergency arrangements. [Paste my calendar context.]

Human check: remove or update seasonal answers promptly after the event.

7. Handle common problems openly

36. Customer-resistance plan

Context to provide: relationship model; likely objections; preferred human channels; first task; and feedback options.

Prompt:

Create an introduction plan for a new website chatbot that respects customers who prefer a person. Write plain-language disclosure wording, choice of contact route, feedback question, escalation wording and an observation plan. Do not present the chatbot as a replacement for people or claim it will make customers happier. [Paste my context.]

Human check: listen to real objections and adjust the design rather than forcing adoption.

37. Beginner troubleshooting guide

Context to provide: platform support route; website platform; common past web issues; integrations; and internal owner.

Prompt:

Create a first-line troubleshooting guide for my chatbot. Cover widget not appearing, incorrect answer, broken link, failed handover, duplicate enquiry, unavailable integration, suspicious input, account-access problem and customer complaint. For each issue include a simple check, safe action, evidence to save, when to disable chat, and when to contact supplier support. Do not give instructions that expose credentials or weaken security. [Paste my context.]

Human check: record outages and wrong answers so the same problem is not repeatedly rediscovered.

38. Human-plus-chat workaround design

Context to provide: scenarios where chat struggles; real human process; support capacity; and customer needs.

Prompt:

Design a human-plus-chat workaround for these difficult scenarios. State what the chatbot may do, what it must not do, the information it may collect, the handover trigger, receiving owner, expected next communication and manual fallback. Prefer an honest “a person needs to review this” message to a plausible invented answer. [Paste my scenarios.]

Human check: a good handover is a feature, not a failure.

39. Privacy and data-handling checklist

Context to provide: location; visitor locations; data categories; suppliers; proposed use; retention idea; and contact route.

Prompt:

Create a practical privacy and data-handling question list for this chatbot project. Cover purpose, data minimisation, lawful-basis and privacy-information questions, special-category or children’s data, controller/processor roles, supplier terms, data location/transfers, retention/deletion, access, security, cookies/analytics, individual rights, DPIA screening and incident route. Mark which points require official guidance or qualified advice. Do not state that the project is compliant. [Paste my context.]

Human check: compare the completed list with current ICO guidance before launch. [1](#) [3](#)

40. Differentiation without hype

Context to provide: competitors’ visible support options; your actual strengths; customer priorities; and current evidence.

Prompt:

Identify ways this chatbot could be distinctly useful without making unsupported superiority claims. Focus on clarity, accurate self-service, respectful handover, accessible language, reliable follow-up and well-maintained information. For every idea, say what evidence would be needed before making it a marketing claim. [Paste my context.]

Human check: “helpful and accurate” is often a better differentiator than a more elaborate bot.

8. Measure, report and learn

41. Stakeholder report template

Context to provide: owner/stakeholder questions; review frequency; available data; costs; risks; and decisions needed.

Prompt:

Draft a one-page chatbot review report. Include purpose and scope, observation period, baseline or limitation, key measures, customer feedback, corrections and escalations, cost/usage, security or privacy issues, changes made, unresolved risks, and a decision to maintain, improve, pause or stop. Use neutral language; do not describe a result as success unless the evidence supports the stated goal. [Paste my context.]

Human check: include bad news and unresolved issues, not only attractive charts.

42. Customer-feedback plan

Context to provide: current feedback routes; customer effort tolerance; support process; and improvement priorities.

Prompt:

Design a low-friction feedback plan for this chatbot. Suggest one optional in-chat question, one route for detailed feedback, a safe way to review comments, categories for analysis, owner, retention question and how to tell staff about urgent issues. Avoid dark patterns and do not repeatedly ask a visitor to rate the chat. [Paste my context.]

Human check: feedback must reach someone who can act on it.

43. Evidence-based case-note template

Context to provide: a real interaction; consent/permission status; observation period; and relevant measures.

Prompt:

Create an internal case-note template for a chatbot interaction. Include initial visitor need, permitted anonymised evidence, chatbot action, human involvement, outcome, correction or limitation, evidence source and lesson. If the story is later considered for marketing, add a separate permission and claim-verification checklist. Do not turn an anecdote into a testimonial or general performance claim. [Paste my interaction summary.]

Human check: remove personal information unless there is a clear authorised reason to retain it.

44. Unsuccessful-interaction review

Context to provide: anonymised failed or poor conversations; current categories; known system changes; and owner.

Prompt:

Analyse these unsuccessful interactions using a consistent review format. For each, identify what the visitor needed, what happened, root cause hypothesis, evidence, impact, immediate safeguard, permanent improvement candidate, owner and retest case. Separate a content problem from a technical failure, unclear input, inappropriate scope or a missing human route. Do not blame a customer for using ordinary language. [Paste my anonymised cases.]

Human check: fix higher-risk failures first, even if they are rare.

45. Long-term value review

Context to provide: original purpose; baseline; costs; customer feedback; support workload; wider changes; and observation period.

Prompt:

Review the long-term value of this chatbot using the evidence below. Compare the original purpose with observed service quality, customer effort, staff workload, cost, risks, limitations and opportunity cost. Distinguish correlation from a result caused by the chatbot. Recommend maintain, redesign, narrow, expand cautiously or retire, with evidence and unanswered questions for each choice. Do not claim growth, retention or competitive advantage without a credible comparison. [Paste my evidence.]

Human check: retirement is a valid outcome when the chatbot does not meet a real need.

A beginner implementation SOP

Use this as a standalone sequence after you complete the relevant prompts. The suggested durations are **illustrative planning ranges**, not promises. A complex integration, data-protection review, seasonal deadline or lack of approved content can lengthen the work.

Step	Owner	Trigger / input	Numbered action	Output	Exception / human fallback
1. Choose one task	Business owner	Repeated visitor question and current answer source	1. Name the task. 2. Name what it will not do. 3. Name the person who owns the answer.	Scope note	If no approved answer exists, improve the webpage or FAQ first.
2. Prepare content	Content owner	FAQs, policies and customer-service knowledge	1. Write answers. 2. Link each to its source. 3. Flag uncertain material. 4. Write handover wording.	Approved first-release content	Escalate uncertainty to the policy/ process owner.
3. Decide data and security	Owner with appropriate adviser/support	Supplier shortlist and proposed data flow	1. Complete privacy/security questions. 2. Configure account access and MFA. 3. Decide retention and manual fallback.	Recorded decisions and access plan	Pause if the supplier terms, data role or risk cannot be understood.

Step	Owner	Trigger / input	Numbered action	Output	Exception / human fallback
4. Configure the smallest version	Platform administrator	Approved scope and content	1. Install on one page or limited audience. 2. Add approved content only. 3. Set human route. 4. Document how to disable it.	Test version	Do not connect a system unless it is required for the first task.
5. Test before visitors	Owner and service colleague	Realistic, non-sensitive scenarios	1. Test normal questions. 2. Test unclear questions. 3. Test no-answer and handover. 4. Test failure/disable route. 5. Record defects.	Test log and go/no-go decision	Keep chat off until serious defects are fixed or scope is reduced.
6. Release narrowly	Named release owner	Signed-off test log	1. Enable for the agreed scope. 2. Monitor daily at first. 3. Check escalations reach a person.	Limited live release	Disable or narrow chat if it gives material wrong answers, exposes data or loses handovers.
7. Review and decide	Owner and content owner	Evidence from defined observation period	1. Review measures and samples. 2. Fix high-risk issues. 3. Update content/version log. 4. Decide maintain, change, expand, pause or retire.	Review note and next action	Return to the manual process if the task is not delivering safe, useful value.

Working pages

First-release decision

- The one visitor problem we will address: _____
- The approved source for the answer: _____
- What the chatbot will never do in this release: _____
- Named content owner: _____
- Named escalation owner and route: _____
- Manual fallback: _____
- First page/audience for release: _____
- Evidence we will review before expanding: _____
- Stop or pause condition: _____
- Decision, date and decision-maker: _____

Pre-launch checklist

- ☐ The chatbot has one defined task and documented exclusions.
- ☐ Every live answer has an approved, current source and named owner.
- ☐ Visitors can reach a person or suitable alternative.
- ☐ Handover works during and outside stated hours.
- ☐ No credentials, unnecessary personal data or sensitive material have been put into prompts or knowledge sources.
- ☐ Privacy information, data use, retention and supplier questions have been reviewed for the actual set-up.
- ☐ Account access is limited, multi-factor authentication is enabled where available, and an access owner is named.
- ☐ Internal testers tried normal, ambiguous, no-answer and failure scenarios.
- ☐ There is a documented way to switch chat off and use the manual route.
- ☐ Measures, review date and change owner are agreed.

Final notes and references

1. ICO: A guide to lawful basis

<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/lawful-basis/a-guide-to-lawful-basis/>

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3. [ICO: Data Protection Impact Assessments](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/accountability-and-governance/data-protection-impact-assessments-dpias/)

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4. [ICO: Business-to-business marketing](https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/)

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5. [NCSC: Small organisations guide to cyber security](https://www.ncsc.gov.uk/collection/small-organisations-guide-to-cyber-security)

<https://www.ncsc.gov.uk/collection/small-organisations-guide-to-cyber-security>

6. [NCSC: Multi-factor authentication for corporate online services](https://www.ncsc.gov.uk/collection/mfa-for-your-corporate-online-services)

<https://www.ncsc.gov.uk/collection/mfa-for-your-corporate-online-services>

7. [NCSC: Cloud security shared responsibility model](https://www.ncsc.gov.uk/collection/cloud/understanding-cloud-services/cloud-security-shared-responsibility-model)

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