



The 30-Minute Chatbot Launch Checklist

Automating Customer Service (Without Losing the Human Touch)

What this is: A practical, step-by-step checklist to get your first chatbot live today - written for busy small business owners who want real results, not tech headaches.

How to use it: Print or keep open on your screen; work straight down the list; check items off; launch; then use the Post-Launch Tuning section over the next 7 days.

1) Before You Start

- **Pick your goal:**
 - ☐ Reduce repetitive inquiries
 - ☐ Capture more leads
 - ☐ Book more appointments
 - ☐ Faster order updates
- **Choose your top channel:**
 - ☐ Website widget
 - ☐ Facebook/Instagram DMs
 - ☐ WhatsApp/SMS
- **Pick one platform to start:**
 - ☐ Tidio
 - ☐ ManyChat
 - ☐ HubSpot Free
 - ☐ Intercom Starter

(Any one is fine - don't overthink it!)

- **Decide your brand voice:** 3 words you want customers to feel:

2) Gather the Essentials

- **Top 5 FAQs you answer every week** (*write your real-life answers in your own words*)

1.

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- **Business basics (for the bot):** hours, location(s), pricing ranges, service area, booking link, refund/return policy, shipping time, contact email/phone.
- **Lead capture fields:** First Name, Email (and optionally Phone for SMS).
- **Escalation contact:** Who (you or team member) + best email/SMS for handoffs.

3) Build the MVP Bot

- Create a **friendly welcome:**
“Hey there! I’m the assistant for [Business]. I can help with hours, pricing, appointments, and order status. What do you need?”
- Add **Quick-Reply Buttons** (3–5 to start):
 - ☐ “Hours & Location”
 - ☐ “Pricing & Services”
 - ☐ “Book an Appointment”
 - ☐ “Order Status”
 - ☐ “Talk to a Human”

- **Answer Cards** (write them like you speak):
 - **Hours & Location:** “We’re open Mon–Fri 9–6, Sat 10–2 at 123 Main St. Want directions or to book a time?”
 - **Pricing & Services:** “Most jobs fall between \$_____ and \$_____ depending on **X/Y**. Want me to send the full pricing sheet to your email?”
 - **Book an Appointment:** “Great! Here’s the link to our calendar: [Calendly/booking link]. Would you prefer I take your info and we’ll confirm by email?”
 - **Order Status:** “Pop in your order number and zip code, and I’ll check it.”
 - **Lead Capture step** before in-depth answers:

“I can send details and a quick checklist to your email. What’s your best email?”
 - **Human Handoff** trigger:

If user types “human/agent/real person,” or taps “Talk to a human,” send:
“You got it. I’m connecting you with [**Your Name**] now - expect a reply within ____ hours. Want to add any details?”
→ Forward transcript to escalation email/SMS.
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4) Launch Readiness

- **Test twice** (you + a non-tech friend).
 - **Turn it on** (website widget toggle or DM automation ON).
 - **Announce:** “New: Instant answers on our site - try the chat bubble!”
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5) Day-1 Script Templates (copy/paste & tweak)

Friendly Greeting (Website)

“Hi, I’m the assistant for [**Your Business**] 🙋 I can help with hours, pricing, appointments, and order status - fast. What do you need?”

Lead Capture

“Happy to help! I can send the details to your email so you don’t have to keep the tab open. What’s your best email?”

Human Handoff

"I'll loop in [**Your Name**] now. You'll hear back within [**time promise**]. Anything else you want us to know?"

Authentic Apology (if bot is unsure)

"Sorry - that one's a bit specific. I don't want to guess and waste your time. I'll hand this to [**Your Name**] for a precise answer."

6) Industry Mini-Flows (pick one to start)

Retail / E-com

- Q: "Do you have ____ in stock?"
A: "Likely yes for sizes S–XL. Want the product link + restock alerts by email?"
- Q: "Where's my order?"
A: "Share your order # + zip, or tap 'Email me status.'"

Real Estate

- Q: "Open houses this week?"
A: "Here's the schedule. Want me to email it + a buyer checklist?"
- Q: "Can I see 123 Oak St?"
A: "Absolutely. Want to pick a time on the calendar or have us call?"

Services (Accounting/Law/Consulting/Auto)

- Q: "What do you charge?"
A: "Most clients start with a \$____ discovery session. Want a 2-page prep guide sent to your email + a link to book?"
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7) Escalation Rules (set these now)

- Escalate if: **refund disputes, legal questions, custom quotes, angry language, anything with "I'm unhappy," "cancel," "complaint."**
 - Response standard: "Human reply within _____ business hours."
 - Channel: Email + SMS alert to owner/manager.
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8) Compliance & Basics

- Privacy note in chat: “We use your info only to serve your request. We never sell your data.”
 - Link to **Privacy Policy** on your site.
 - For SMS: collect explicit opt-in (“Reply YES to get updates”).
 - ADA best practice: ensure keyboard navigation and readable contrast.
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9) Success Metrics (track from Day 1)

- ☐ Conversations started
- ☐ Emails captured (conversion %)
- ☐ Appointments booked
- ☐ Order status requests resolved
- ☐ Human handoffs (and response time)
- ☐ First response time (should be instant)
- ☐ CSAT (simple thumbs-up/thumbs-down after each resolved chat)

Target for Week 1:

- 20–40% of conversations capture an email
 - <25% require human handoff
 - CSAT $\geq$ 85%
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10) 7-Day Post-Launch Tuning Plan

Day 1: Scan transcripts → add 2 new Quick Replies you missed.

Day 2: Tighten lead-capture placement (earlier if drop-offs; later if pushback).

Day 3: Add 1 small “wow” reply (e.g., directions link or prep checklist).

Day 4: Reduce friction—shorten long replies; add buttons.

Day 5: Add 1 escalation rule you wish you had earlier.

Day 6: Add 1 industry-specific flow (from Section 5).

Day 7: Review metrics → set next week's single improvement.

Optional Add-Ons (when you're ready)

- **Appointment integration:** Calendly/Google Calendar.
 - **E-commerce:** Shopify order status integration.
 - **Knowledge base:** paste your FAQ page into the bot's brain.
 - **Support ratings:** thumbs up/down after each resolved chat.
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Final Encouragement

You don't need a perfect bot - you need a **helpful** one. Launch the simple version, then improve it a little each week. That's authentic lean automation!