AI Chatbot Starter Kit for SMBs

Phase 1: Plan Your Chatbot

Step 1: Define Your Chatbot's Purpose

- Ask:
- What problem will it solve? (e.g., 24/7 customer support, lead generation, FAQs).
- Who is the audience? (e.g., customers, employees, website visitors).
- Example Use Cases:
- Answer common questions about pricing/hours.
- Collect contact info for sales leads.
- Route complex issues to human agents.

Step 2: Choose a Platform

- No-Code Tools (Best for SMBs):
- Dialogflow (Google): Free tier, integrates with websites/WhatsApp.
- Tars: Drag-and-drop builder for lead gen.
- ManyChat: For Facebook Messenger/Instagram.
- Landbot: Interactive, form-like chatbots.
- Budget: Start with free tiers; upgrade only if needed.

Step 3: Map Key Conversations

- Action: Outline common user queries and ideal responses.
- Template:
- User: "What's your return policy?"
- Bot: "Our return policy allows returns within 30 days. [Link to policy] Need help with a specific order?"
- Tools: Use a spreadsheet or flowchart tool like Excel, Power BI and Lucidchart

Phase 2: Build Your Chatbot

Step 4: Design the Conversation Flow

- Best Practices:
- Keep messages short and conversational.
- Add buttons for quick replies (e.g., "Yes/No," "Talk to an agent").
- Include fallback responses for unrecognized queries:
- "Sorry, I didn't understand. Let me connect you to a human!"
- Example Flow:
- *Greeting → Ask how to help → Provide options → Route to solution or human.*

Step 5: Train the AI

- Action 1: Upload FAQs, product info, and support documents to the chatbot's knowledge base.
- Action 2: Add "intents" (user goals) and "entities" (key details like dates, product names).
- *Example Intent: "Book appointment" → Extract entities: [Service Type], [Date].*

Step 6: Integrate with Your Systems

- Essential Connections:
- CRM: Zapier to HubSpot/Salesforce for lead capture.
- Live Chat: Add a handoff to tools like Zendesk or Slack.
- Website: Embed via HTML snippet (most platforms provide this).

Phase 3: Deploy & Test

Step 7: Run a Pilot Test

- Action:
- Test internally with employees for 1 week.
- Fix bugs (e.g., broken links, misunderstood phrases).
- Checklist:
- Does the bot handle typos/slang?
- Are fallbacks working?
- Is data being saved correctly (e.g., leads in CRM)?

Step 8: Soft Launch

- Action:
- Deploy the chatbot to a small audience (e.g., 10% of website visitors).
- Monitor metrics: Engagement rate, resolution rate, drop-off points.
- Tools: Use built-in analytics from your chatbot platform or Google Analytics.

Phase 4: Optimize & Scale

Step 9: Analyze Feedback

- Key Metrics to Track:
- User Satisfaction: Add a post-chat rating (e.g., "Was this helpful? Yes/No").
- Top Unresolved Queries: Update your knowledge base or intents.
- Conversion Rate: For lead gen bots, track how many users become leads.

Step 10: Iterate

- Monthly Tasks:
- Add new FAQs based on customer feedback.
- Expand to new channels (e.g., WhatsApp, SMS).
- A/B test different greetings or CTAs.

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Step 11: Advanced Upgrades (Optional)

- Add AI Power-Ups:
- Sentiment Analysis: Detect frustrated users and escalate faster.
- Multilingual Support: Use tools like DeepL or Google Translate API.
- Voice Bot: Convert text chatbots to voice with Amazon Lex.

Free Resources & Tools

- Chatbot Builders: Dialogflow, ManyChat (free tiers).
- Analytics: Google Analytics, Bot Analytics.
- Knowledge Base: Notion, Google Docs.
- Integration: Zapier (free plan for basic workflows).

Quick-Start Checklist

1. Define your chatbot's purpose and audience.
2. Pick a no-code platform (e.g., Dialogflow).
3. Map 5–10 key conversation flows.
4. Train the bot with FAQs and test internally.
5. Deploy, monitor metrics, and refine monthly.

Troubleshooting Tips

- Issue: Bot fails to understand users.
- Fix: Add more training phrases to intents.
- Issue: High drop-off rate.
- Fix: Simplify messages or add a "human takeover" option.

This playbook focuses on simplicity and rapid results. For complex needs (e.g., custom AI models), consult a developer or AI specialist or contact us at info@techelp.app.