MUDCRAFTS

Is your business ready for an AI chatbot? A readiness checklist

Pick the one job, keep the right things human, protect your customers' information and test it before it goes live.

START WITH ONE JOB

- [ ] I can write the job in one sentence, for example: "This chatbot answers our five most common questions and takes messages after hours."
- [ ] The job is one of: common questions, after-hours enquiries, bookings and appointments, order questions (needs a connection to your store), or pointing people to the right page.

KEEP THESE HUMAN

- [ ] The bot does not quote prices or promise things I have not given it exact, current information about.
- [ ] Complaints and sensitive situations go to a person.
- [ ] It gives no advice that needs expertise (medical, legal, financial).
- [ ] Refunds, exceptions and special deals are decided by us, not the bot.
- [ ] It hands over smoothly: "I'll pass this to the team. Can I take your number?"

THE INGREDIENTS

- [ ] Good information: current services, hours, policies and FAQs, written down first.
- [ ] A clear personality that sounds like our business.
- [ ] An honest introduction: it says it is an automated assistant.
- [ ] A way out: a phone number, email or "talk to someone" button.
- [ ] Boundaries: it knows what to say when it does not know.

BEFORE A BOT: WHAT WHATSAPP BUSINESS ALREADY GIVES YOU

- [ ] Business profile (logo, description, hours, website).
- [ ] Greeting message for new conversations and an away message for outside our hours.
- [ ] Quick replies for the questions we answer often, and labels to organise chats.
- [ ] A catalog for products and services.

TEST IT LIKE A CUSTOMER (AN HOUR BEFORE LAUNCH)

- [ ] Ask the questions we really get, then the odd ones.

- [ ] Ask something it should not answer. Misspell things. Ask the same thing a different way.
- [ ] Show it to a friend or staff member and watch where they get stuck.
- [ ] Write down every wrong or weak answer and fix it.

PRIVACY

- [ ] We tell people what we collect and why, in plain words, near where they type it.
- [ ] We only collect what we need.
- [ ] We know where the information goes, who can see it and how long it is kept.
- [ ] We have asked the provider where data is stored and what they do with it.
- [ ] We do not let customers share sensitive details in chat unless we have planned for it.

AFTER ONE MONTH

- [ ] Are the questions it answers the ones we hoped it would?
- [ ] Are customers getting to a person when they need one?
- [ ] Are we getting useful messages in the morning that we would have missed?
- [ ] Which questions does it keep getting wrong? Update the information.
- [ ] Are customers happier, or just less able to reach us? Be honest.

In Canada, PIPEDA applies to private-sector organisations that collect, use or disclose personal information in the course of commercial activity. Other countries have their own rules, so check the ones that apply where your customers live. We are not lawyers: if your business handles sensitive information, get proper advice.

WHERE THE FACTS COME FROM

WhatsApp Business app features: whatsappbusiness.com/products/business-app-features/
Office of the Privacy Commissioner of Canada, PIPEDA in brief: priv.gc.ca (10 fair information principles, including consent, limiting collection and safeguards)

Want a second pair of eyes?

Tell us about your business at mudcrafts.com/contact/ or ask Muddy in the chat on the site.
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