

# Checklist: Creating a Chatbot for Customer Service

A chatbot project, like any other, should be well thought-through and planned in advance. This includes defining the exact target audience the bot will speak with, its look and branding and even its personality. This will help your developers, editors and graphic artists and speed up your rollout.



**This is me**

Do you have an avatar or icon?

**What color am I?**

- Black
- White
- Gray
- Blue
- Green
- Yellow
- Red
- \_\_\_\_\_



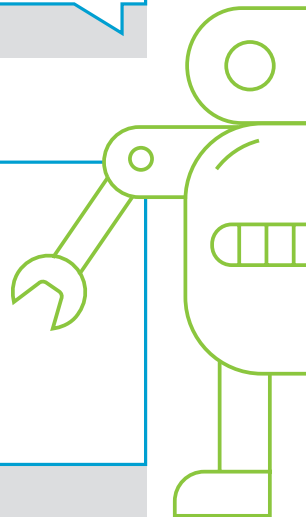

**My main conversation partners will be:**

Who is the target group? Consider age, language, B2B, B2C, etc.

**My personality:**

- Helpful
- Eccentric
- Funny
- Problem solver
- Extroverted
- \_\_\_\_\_

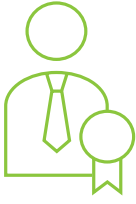
What kind of personality should your bot have?

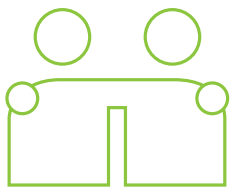



**My name is:**

Give your bot a name that fits the personality, tone and image you want to project. It could be a person's name, related to your company name or something you make up!

**I serve as a:**

Expert 

Helpful friend 





**How I greet users:**

” \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ “

Be sure to always introduce the chatbot as a bot to avoid misunderstandings.

**My speaking style is:**

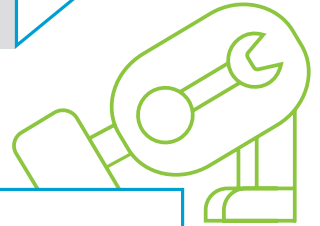
Informal  Quirky

Formal  Cheeky

Regional Accent/Dialect

**I'll escalate to a live agent for the following topics:**

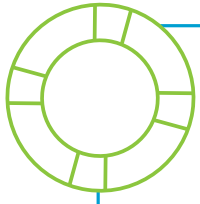
Define the escalation points for your bot when it should transfer users to a live agent.



**I will not respond to:**

- 
- 
- 

Choose what the bot should ignore such as curse words, insults and other inappropriate topics.



**I can help with the following:**

- 
- 
- 
- 

Define clear issues and topics the bot is able to support to set user expectations.

**I make small talk like:**

Many users want to test chatbots or see how human-like they are. Define at least some common small talk phrases for it.