thanksTom

CHATBOT PROFILING QUESTIONNAIRE

**Use this workbook to define purpose, tone, guardrails, and handover before you choose a tool.**

Use it for a free pilot or a paid platform. It also helps when you compare options and ask which chatbot is best for your site. Use this workbook to define purpose, tone, guardrails, and handover before you choose a tool.

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How to use
Pick your answers, add short notes, and leave anything that does not apply. Aim to complete this in thirty to forty minutes.
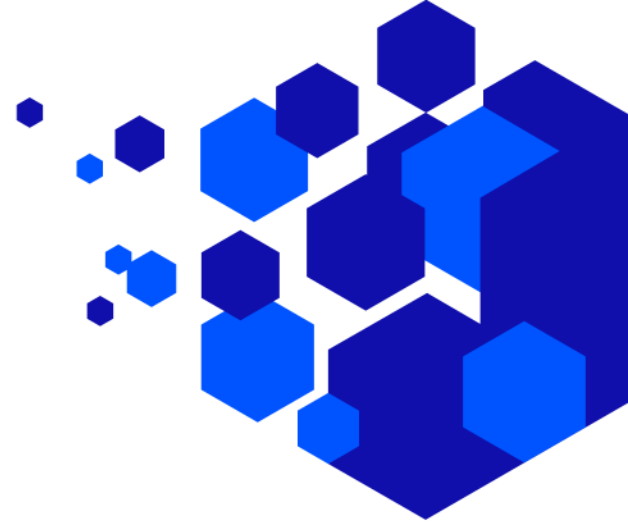
A. Project Overview and Goals

A1. PRIMARY GOALS

Select up to three.
[ ] Reduce repeat emails
[ ] Improve response time
[ ] Capture qualified leads
[ ] Increase bookings or sales
[ ] Extend after-hours support
[ ] Reduce cost per contact
[ ] Improve customer satisfaction
[ ] Other _____

A2. SUCCESS MEASURES

Target response time: _____ minutes
Lead capture per month: _____
Booking or enquiry uplift: _____ %
Customer satisfaction target: _____ / 5
Time saved per month: _____ hours

A3. CONSTRAINTS

Budget range: £ _____
Target launch date: _____
Internal time available per week: _____

B. Audience and Top Questions

B1. MAIN AUDIENCE SEGMENTS

[ ] New visitors
[ ] Returning customers
[ ] Trade or partners
[ ] Press or media
[ ] Other _____

B2. CHANNELS TO SUPPORT

[ ] Website desktop
[ ] Website mobile
[ ] WhatsApp or SMS
[ ] Email handover
[ ] Other _____

B3. TOP QUESTIONS TO ANSWER

List up to ten with rough volume

1. _____ (per week ___)
2. _____ (per week ___)
3. _____ (per week ___)
4. _____ (per week ___)
5. _____ (per week ___)

C. Scope, boundaries and handover

C1. TOPICS THE ASSISTANT MAY ANSWER

Allowed:

_____

_____

_____

_____

_____

_____

C2. TOPICS THE ASSISTANT MUST AVOID

Not Allowed:

_____

_____

_____

_____

_____

_____

C3. ESCALATION TRIGGERS

[ ] Medical or safety questions
[ ] Complaints or refunds
[ ] Complex booking changes
[ ] Payment or pricing disputes
[ ] Anything outside the knowledge base
[ ] Other _____

C4. HANDOVER REQUIREMENTS

Information to collect before handover
[ ] Name
[ ] Email
[ ] Phone
[ ] Booking reference
[ ] Preferred time to contact
[ ] Free text summary from the bot

C5. SERVICE STANDARD FOR HUMAN REPLIES

We will respond within _____ hours during business hours.

D. Persona and Tone of Voice

D1. VOICE TRAITS

Choose up to three.
[ ] Friendly
[ ] Calm
[ ] Expert
[ ] Practical
[ ] Reassuring
[ ] Playful
[ ] Other _____

D2. WRITING STYLE RULES

Do
· Short sentences
· Plain English
· Link to the most relevant page
Avoid
· Jargon
· Hype
· Guessing

D3. READING LEVEL AND LANGUAGE

Preferred reading level:

[ ] Simple

[ ] Standard

[ ] Detailed

 Languages to support: _____

E. Knowledge Sources for Training

Tick what you will include and list locations or owners.

[ ] Operations manual and policies Location or owner: _____

[ ] Standard email replies Location or owner: _____

[ ] Website pages and URLs Location or owner: _____

[ ] Price lists and schedules Location or owner: _____

[ ] Newsletters and blog posts Location or owner: _____

[ ] PDFs or handouts Location or owner: _____

[ ] Other materials Location or owner: _____

E1. VERSION CONTROL AND UPDATES

Owner of the source of truth: _____

Update cadence:

[ ] Weekly

[ ] Monthly

[ ] Quarterly

F. Privacy and GDPR

F1. LAWFUL BASIS AND CONSENT

Lawful basis for processing: _____

Consent method for marketing contacts: _____

F2. DATA COLLECTED BY THE ASSISTANT

[ ] Name

[ ] Email

[ ] Phone

[ ] Booking reference

[ ] Notes from the conversation

Retention period: _____ months

F3. DATA LOCATION AND ACCESS

Data residency requirement: _____

Who can access transcripts: _____

G. Integration and User Experience

G1. ACCESSIBILITY

Keyboard navigation checked: [ ] Yes

Alt text and labels checked: [ ] Yes

Colour contrast meets WCAG AA: [ ] Yes

G2. PLACEMENT

Where the assistant appears
[ ] All pages
[ ] Key service pages
[ ] Blog only
[ ] Contact page
 Open behaviour
[ ] Icon only
[ ] Auto open on exit intent
[ ] Auto open on repeat visit

G3. ACCESSIBILITY

Keyboard navigation checked:
[ ] Yes
Alt text and labels checked:
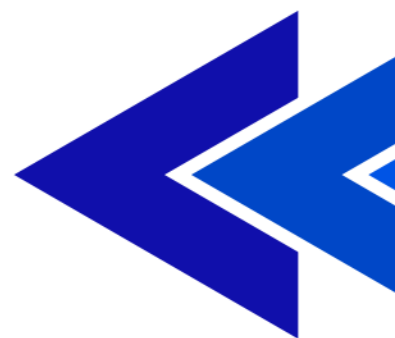[ ] Yes
Colour contrast meets WCAG AA:
[ ] Yes

G4. ANALYTICS AND EVENTS

Track the following
 [ ] Chat started
 [ ] Article link clicked
 [ ] Lead submitted
 [ ] Handover triggered
 [ ] Booking link clicked
 Analytics platform:

_____

H. Testing, Accuracy & Safety

H1. TEST SCENARIOS

List five questions to verify before launch
 1. _____
 2. _____
 3. _____
 4. _____
 5. _____

H2. QUALITY BAR

Minimum accuracy target before launch: _____ %
Tone check owner: _____

H3. WHEN THE BOT DOES NOT KNOW

Preferred behaviour
[ ] Offer to email the team
[ ] Ask a clarifying question
[ ] Link to a related page
[ ] End the chat politely

I. Operations and Reporting

I1. DAY TO DAY OWNER

Name and role:

_____

I3. CORE METRICS TO REPORT

[ ] Conversations
[ ] Deflection rate
[ ] Leads captured
[ ] Bookings influenced
[ ] Average response time
[ ] Customer satisfaction
[ ] Time saved estimate

I2. WEEKLY OR MONTHLY REVIEW

Frequency:
[ ] Weekly
[ ] Monthly

Who attends:

_____

I4. INCIDENT HANDLING

Who fixes incorrect answers:
_____

Time to fix target: _____ hours

J. Pilot and Rollout Plan

SIGN OFF

Approved by: _____

Date: _____

Pilot start date: _____

Duration: _____

Pages in scope:

_____

Go or no go criteria:

_____

Comms plan for customers:

_____

QUICK CHECKLIST

[ ] Goals set and success measures defined

[ ] Top questions listed and prioritised

[ ] Allowed and not allowed topics agreed

[ ] Persona and tone confirmed

[ ] Knowledge sources collected and owned

[ ] Privacy, consent, and retention documented

[ ] Placement, analytic,s and accessibility planned

[ ] Test scenarios written and quality bar set

[ ] Owner and review cadence agreed

[ ] Pilot plan and sign off complete

thanksTom

Contact Us

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