

# The Ultimate Chatbot Playbook

Three Easy Steps to Creating  
Game-Changing Conversations  
With Your Customers





# Table of contents

**Welcome Message 3**

**Step 1 Building Up Your Chatbot Knowledge** *(And why they are awesome.)*

- Why Chatbots Are Game-Changing Conversationalists 4
- Chatbot Benefits 5
- The Anatomy of a Chatbot 6
- Questionnaire #1: Would Your Company Benefit From a Chatbot Program? 7

**Step 2 Building Your Chatbot** *(And how to crush experience mapping.)*

- You Got Bot: How Bots Help Across the Customer Lifecycle 8
- Experience Mapping and Logic Creation 10
- Bots Rule! (And Some Bot Rules) 11
- Creating a Conversation Workflow 15
- Questionnaire #2: What's the Scope? 17

**Step 3 Building Your Bot Team** *(And when to hire outside help.)*

- Putting the Right Experts in the Right Seats 18
- Building the Ideal Bot Team 19
- Team Structure 20
- When to Hire Outside Expertise and Resources 21
- Questionnaire #3: Build Your Bot Team 22

**Contact Quiq 23**

**Glossary of Terms 24**



# Welcome to Quiq's Ultimate Chatbot Playbook

Get Ready to Learn How to Build a Chatbot For Your Business

Welcome to Quiq's Ultimate Chatbot Playbook. We're glad you found us, and can't wait to help you understand how chatbot technology works and how it can help move your company ahead of the competition.

This playbook is intended to be a Quiq (Get it? Quick!) overview of chatbots, what they do, their benefits, and how they work. We've broken down the basics into three steps that will also help you figure out if a bot is right for your business and what kind of team you need to make it happen.

## Step 1: Building Up Your Chatbot Knowledge

In this section, you'll learn the basics of chatbots, how they work, and how they benefit businesses of all shapes and sizes.

## Step 2: Building Your Chatbot

Throughout step two, we walk you through essential steps to building a bot, such as experience mapping and logic execution.

## Step 3: Building Your Bot Team

We finish the playbook with a section on how to build the right team to manage your bot program.

## Quiq Questionnaires

We've also included a few questionnaires that can help you determine if a chatbot is right for your company, as well as what it will take to get one integrated into your systems.

[Take a look through the playbook.](#) We'd love to have a conversation about how Quiq can help you start creating more game-changing conversations with your customers.

**Learn more** about [Quiq](#), the leading Conversational AI and Business Messaging Platform.

## Questions?

We're here for you. Contact us at [marketing@quiq.com](mailto:marketing@quiq.com).



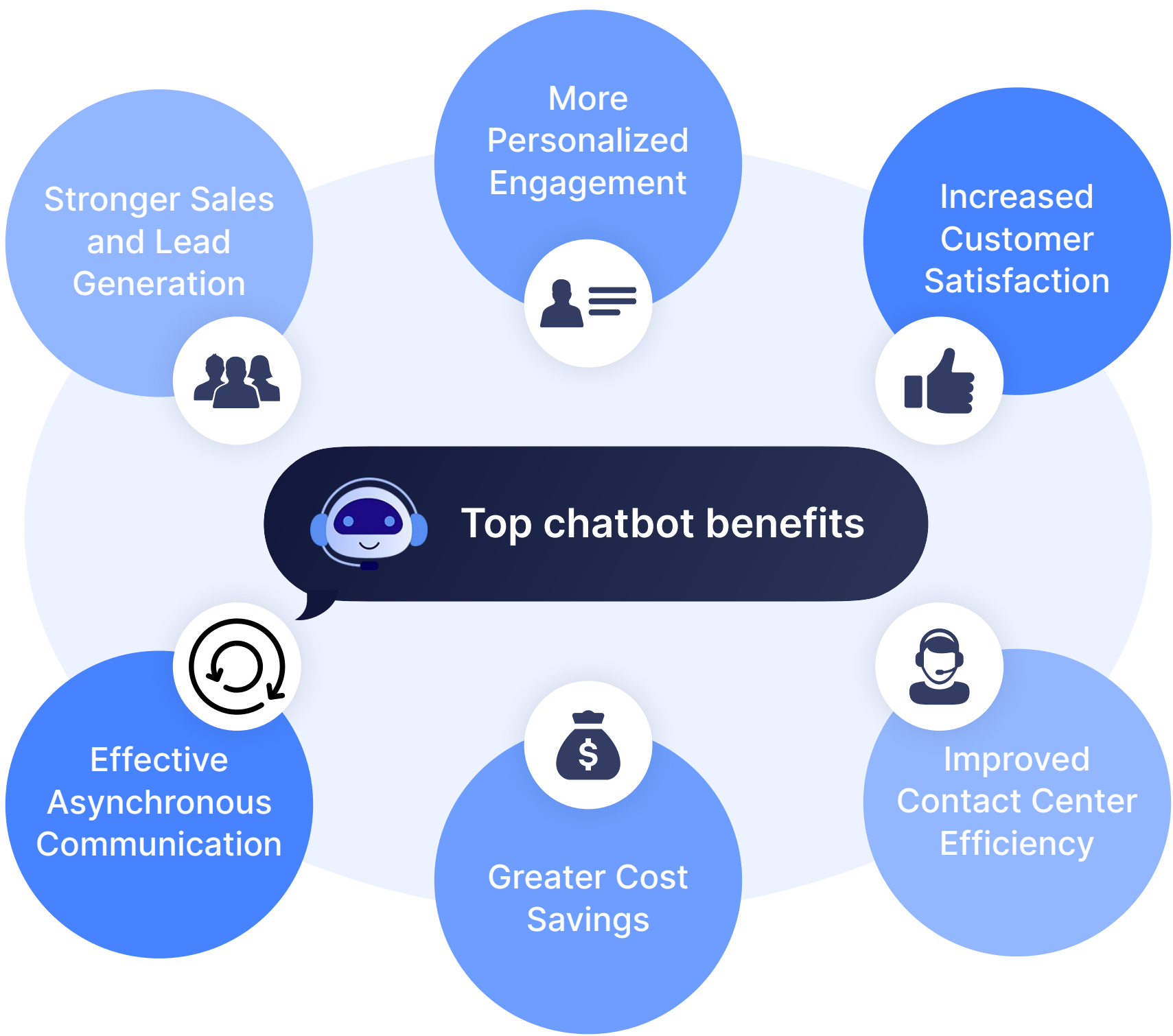
# Step 1

# Building Up Your Chatbot Knowledge

## Why Chatbots Are Game-Changing Conversationalists.

Let’s face it: Your customers control everything from online reviews to organic referrals, and their preferences often help determine which products and services you plan to sell.

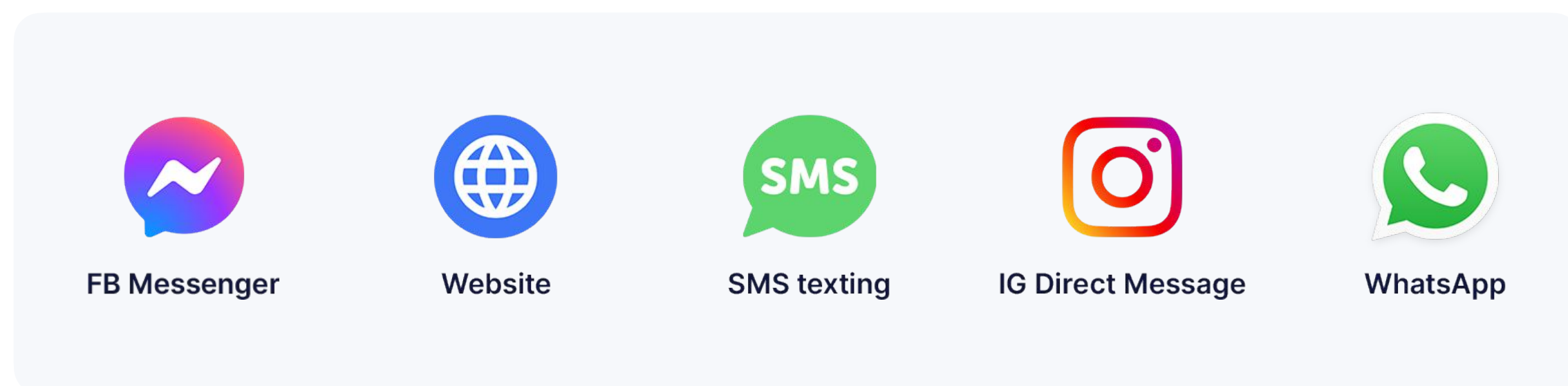
While it has certainly changed how e-commerce businesses market, sell and serve customers, technology — like chatbots — can make growing your company easier than you think!



## Chatbot Benefits

Chatbots give you some of the power back by helping you reach your customers and shoppers on their preferred platforms—**instantly**. With chatbot technology like Quiq's, you can implement AI-driven conversations with your customers on most (if not all) of your digital channels. This allows your customers to engage with you on their channel of choice—24/7 on chats that don't need agent support. And increasing customers' self-service with a bot simultaneously reduces volume and makes conversations requiring agents more efficient.

**Artificial intelligence helps you serve your customers without the need for human support.** Using AI, we're able to navigate common questions and concerns that come in, and also route more complicated topics to customer service representatives, or what we call human agents.



**A bot can also answer queries.** Bots integrate into companies' internal call-back systems and deliver desired information back to the customer—such as Order Status, Account Balances, or Appointment Confirmations.

**Chatbots also take the pressure off your customer service and sales teams.** Bots are excellent at presenting an FAQ or collecting a name and email address in a digital channel prior to routing your customer to the next available agent. A bot performs many routine functions that free up time for human agents to assist with more complicated queries—even upselling or cross-selling to customers.

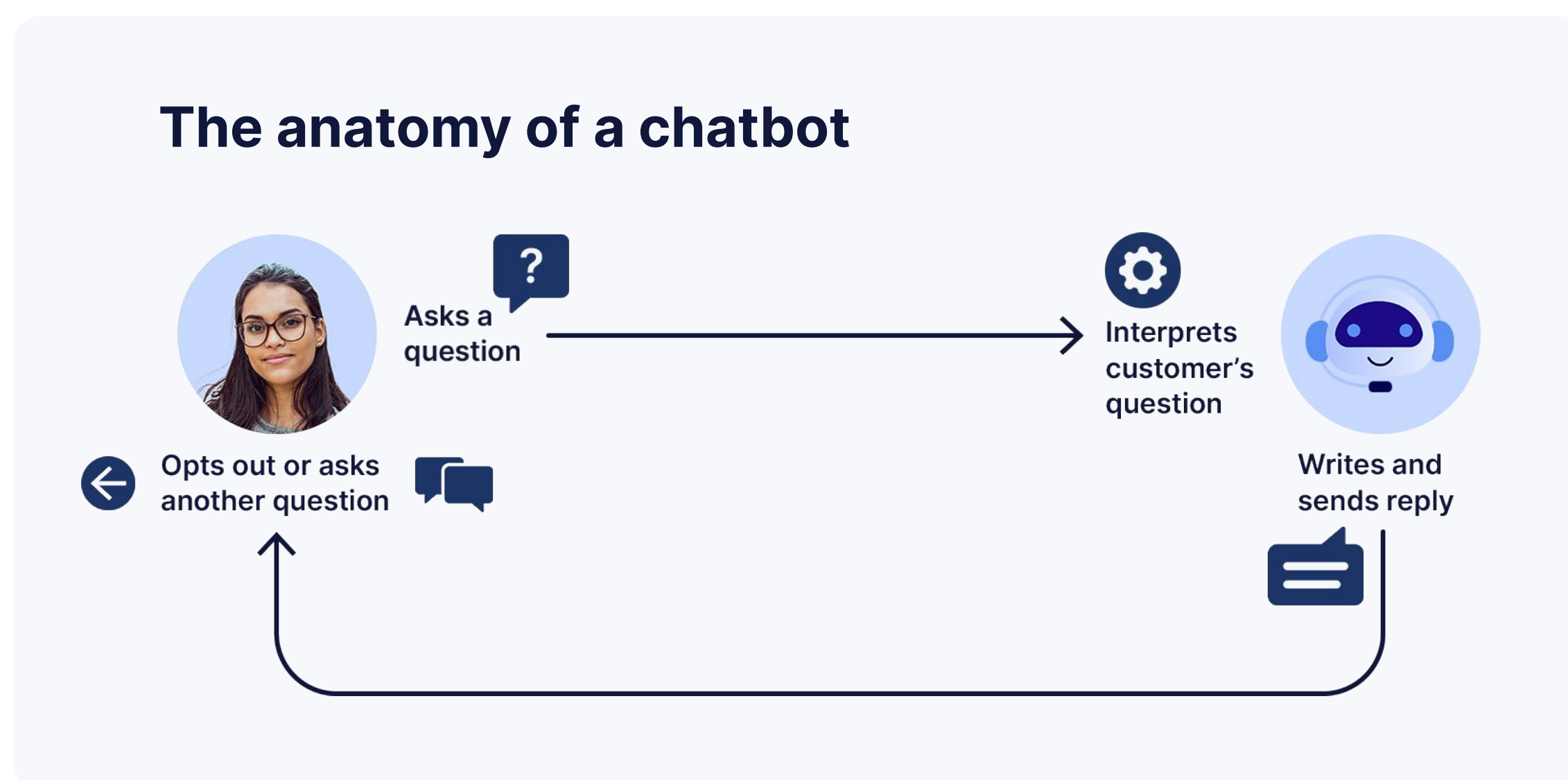


## The Anatomy of a Chatbot

Chatbots translate, answer, and predict queries and requests from customers using predetermined logic that you define based on the most common questions, concerns and requests that come from your customers.

Chatbots can be built to engage in one-time interactions with customers, or they can manage regular, timely conversations to help you drive consistent engagement and sales.

The bot analyzes a query coming from a user, then it determines through Natural Language Processing (NLP) how to answer the question. If the chatbot can't translate because the query is too complicated, it can send the message to a human agent, who will then follow up with the customer.



**Chatbots** are the automated conversation systems behind our favorite devices that help us enjoy personalized experiences online. Smart speakers and automatic direct messaging are two examples of chatbots.

**AI chatbots** like the ones built for Quiq clients are chatbots powered by artificial intelligence that reacts to customer questions, comments, and requests. AI chatbots, sometimes called virtual agents, help companies personalize the customer experience.

**Questionnaire #1****Would Your Company Benefit From a Chatbot Program?**

If you check “Yes” to all or most of the questions, it’s time for your company to implement a chatbot.

- Are you an e-commerce company?  
☐ Yes    ☐ No
- Does your customer service department get overwhelmed by online queries?  
☐ Yes    ☐ No
- Is exceptional customer experience a goal for your company?  
☐ Yes    ☐ No
- Do you take customer conversations from multiple platforms, like SMS/text messaging, web chat, Instagram Direct Message, Facebook Messenger, and WhatsApp?  
☐ Yes    ☐ No
- Are you looking to grow sales online?  
☐ Yes    ☐ No
- Do you have common or repetitive customer requests?  
☐ Yes    ☐ No
- Are you experiencing spikes in contact requests, either unplanned or seasonal?  
☐ Yes    ☐ No
- Would more efficient filtering, routing, and information gathering result in better experiences, customer support, and/or increased sales?  
☐ Yes    ☐ No



## Step 2

# Building Your Chatbot

### You Got Bot: How Bots Help Across the Customer Lifecycle

Before we get into the nitty-gritty details of experience mapping and logic sequences, it's helpful to understand a few ways bots help across the customer lifecycle.

1. Pre-sales

2. Post-sales

3. Ongoing customer care

### From Browser to Buyer: Examples of Ways Bots Support Customer Lifecycles

Here are examples of three roles a bot is well suited for, although there are a whole range of “use cases,” (aka, conversation scenarios) bots are adept at managing with little or no human intervention.

If you have a use case you'd like to create or design, please reach out to [marketing@quiq.com](mailto:marketing@quiq.com) to discuss. Our conversation designers would love to help!

#### 1. Pre-sales

**Product quizzes** are great examples of ways bots can help manage the pre-sale process.

Another popular pre-sales opportunity is **appointment booking**. Often prospects are on your site and would be willing to book an appointment with a sales specialist. A chatbot can do all of this for you.

Find your favorite flavor.  
Take our chocolate quiz.





## 2. Post-sales

In this post-sales scenario, the bot can answer questions about order status, which supports post-sales customer engagement.

Predetermined logic sets will then prompt the bot to gather more information from Sara, such as an invoice number.

But wait, there's more! Post-sales bots are also amazing to manage order status updates, facilitating returns and answering warranty questions.

Hello, Sara! Thanks for reaching out to us. How can we help you today?

I need to make a return on these chocolate-covered ants.

OK, I can help you with that. Just a sec...

I've found your info, Sara. Here it is!

## 3. Ongoing customer care

In an ongoing customer care situation, a bot can trigger product recommendations or upgrades that keep the customer in the buying cycle.

Using Natural Language Processing (NLP), the bot will be able to route the conversation based on emotionally-driven words. In this case, "ick" would trigger the bot to infer Sara is not quite satisfied after all.

Hello, Sara! I see you recently ordered a box of dark chocolate-covered ants. How are they tasting?

They were ick, TBH

Okay, I get that. They're not for everyone. Maybe you'd like to try the milk chocolate for 10% off? Here's a link to the ingredients

### Feeling Query Confused?

Understanding how bots interpret user intent is a highly technical and complex process. The good news is that our internal systems — the ones our clients use — include easy-to-use drag and drop solutions that help you create conversation scenarios as easily and seamlessly as possible. Even better? Set up a consultation with us. Our Quiq Conversational Designers, for example, will help you make sense of chatbot behaviors and how we can manipulate them to create meaningful conversations with your customers.

**Quiq Tip****Tools to Help You Create Your Bot Flow(s)**

In the next step, we'll be walking you through the process of creating user flows (sometimes called wireframing). Here are some helpful tools that can help you map out the conversation:

- Excel. No need to get too fancy.
- Whiteboard. Perfect for smaller teams just getting started with a bot project.
- Mind-mapping software like [Coggle](#) and [Lucidchart](#). Great for larger teams and more intricate planning.

**Experience Mapping and Logic Creation**

Experience mapping is a way to outline the step-by-step process to get to the answer the customer needs.

You need to build strong wireframes because chatbots rely heavily on data inputs from humans. The better you map out possible scenarios and interactions prompted by a customer, the more useful your bot will be.

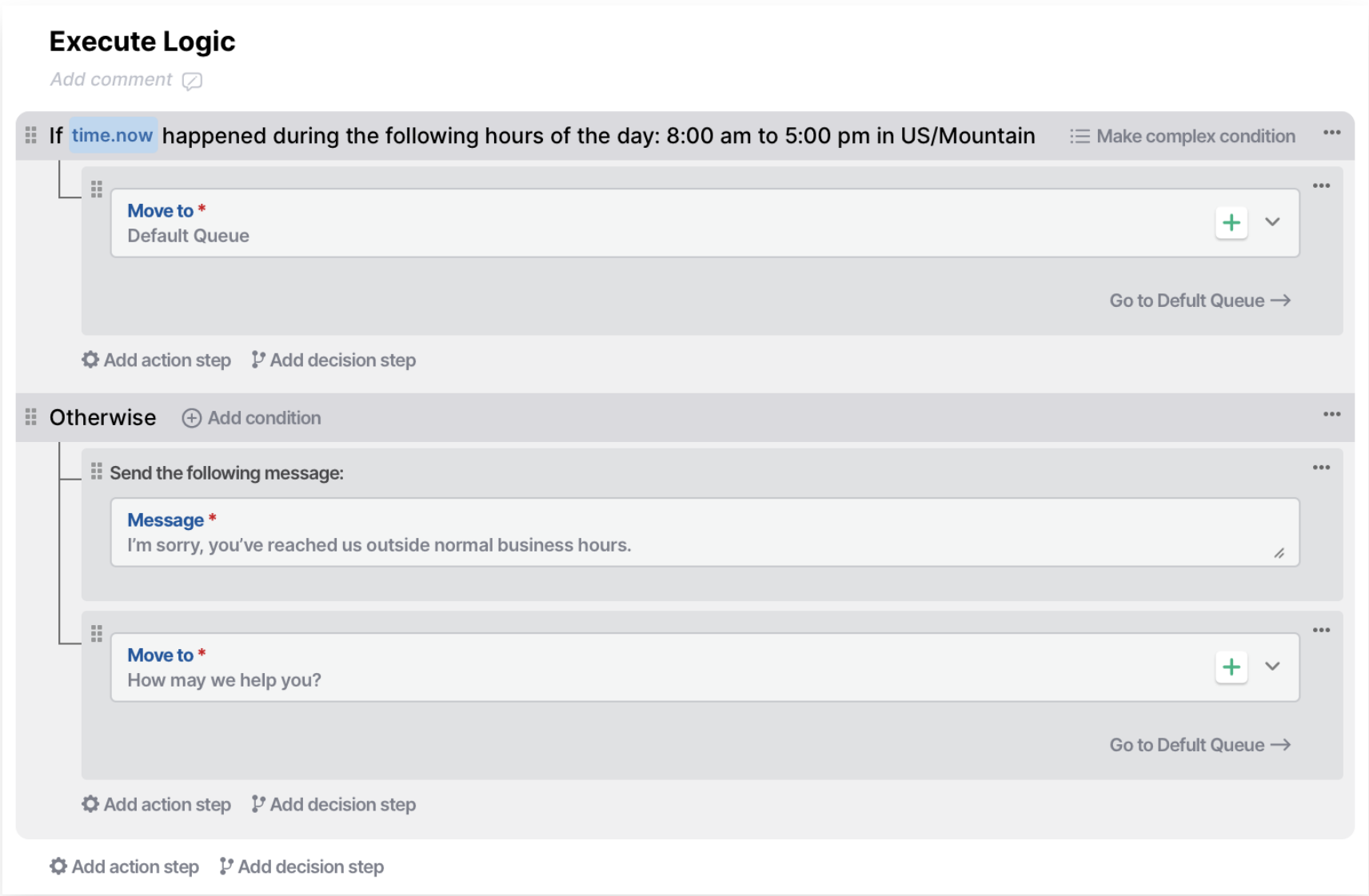
**We understand experience mapping might not be in your wheelhouse and that's a-okay!**

At Quiq, we have Conversational Designers who help our clients create, manage and improve experience maps for their chatbots. They are well-versed in creating these experience maps and logic execution for the simplest to highly complex bots.

After you've gotten through experience mapping, the next step is to translate that information into useful logic. In other words, the humans behind the bot (that would be you and your chatbot project team) will develop rules-based logic that can determine where to go next in the bot's flow.



Here’s what a logic execution looks like in Quiq’s system:

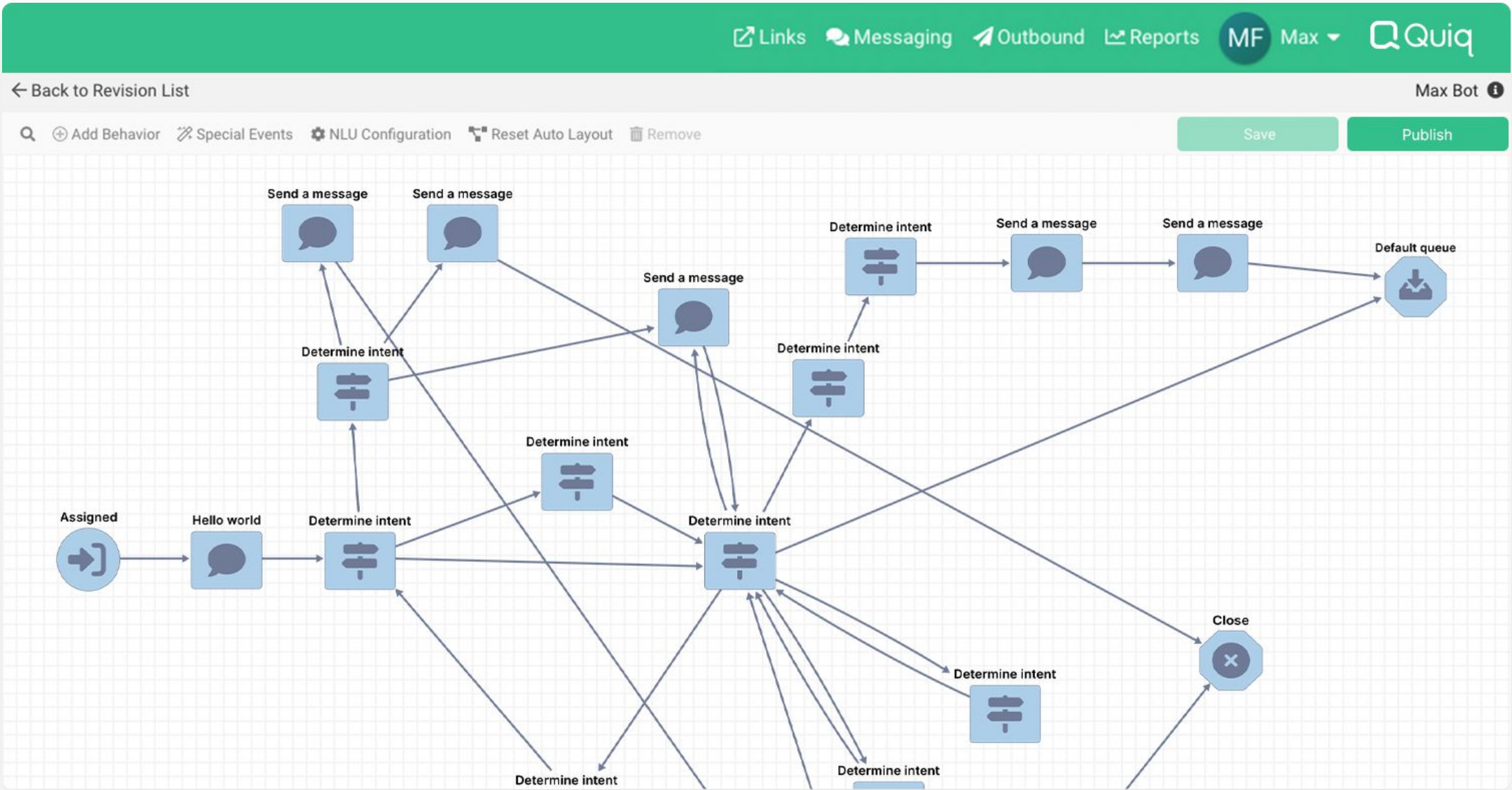


Bots Rule! (And Some Bot Rules)

Experience mapping, laying out wireframes of flow diagrams, and logic execution are important—but so is implementing specific rules for the bot to follow.

Think of your experience map as an actual map. Your logic execution functions as the directions, and your bot behavior and special event rules will tell you how to navigate if, say, there’s road construction, bad weather, or another obstacle that requires you to change directions.

Here is an example of what experience mapping looks like with Quiq. Each box in the diagram represents a specific customer behavior (ex., “Route to Human Agent,” “Customer Upset,” “Customer Unresponsive”).





You might decide to go to different special events based on information, such as data gathered from a chat welcome form, staffing information, queue depths, or the current time of day.

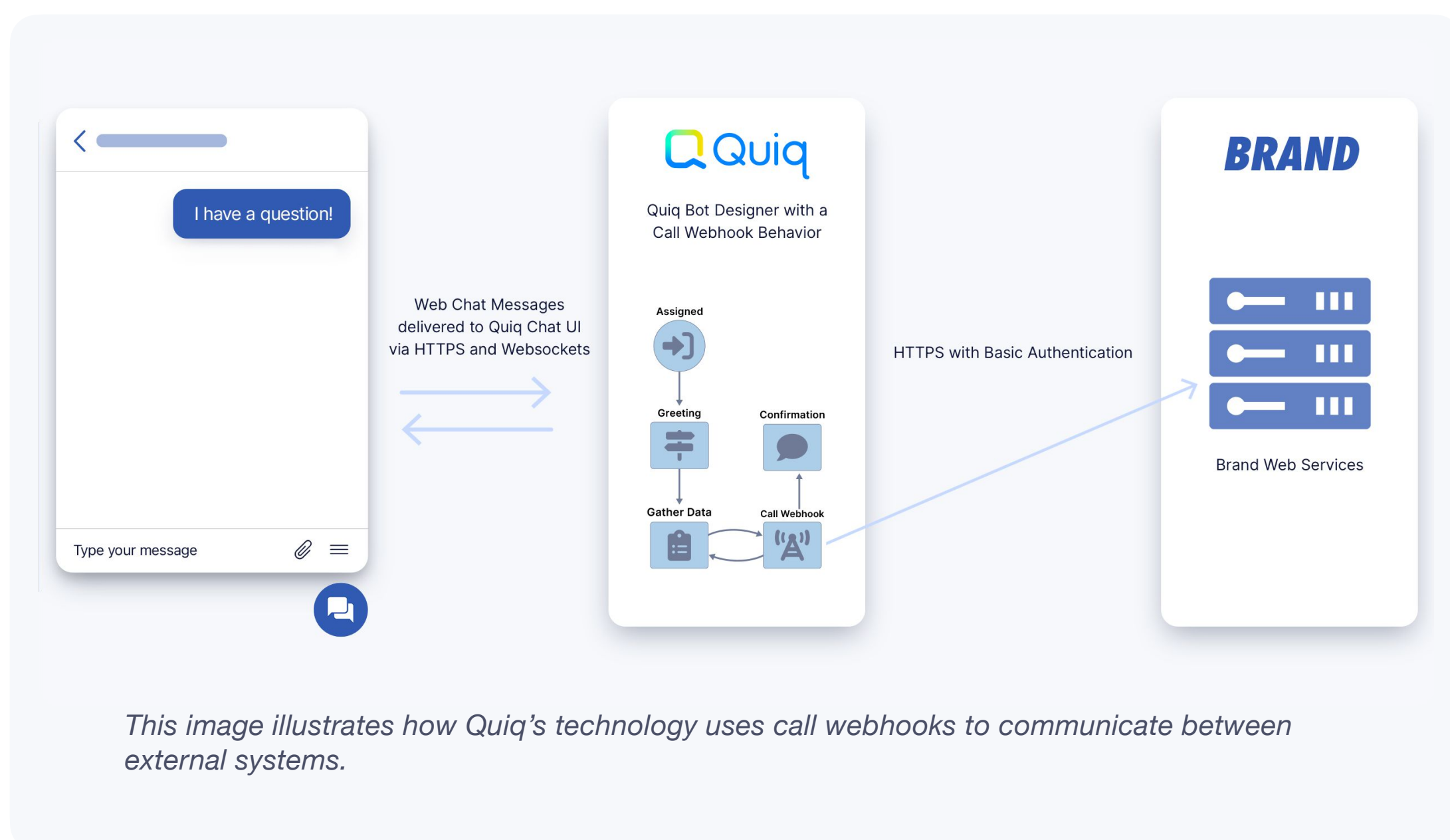
In this section, we'll briefly describe the most common bot behaviors and special events you might include in your mapping:

- Webhooks
- Route to Human Agent
- Customer Upset
- Customer Unresponsive

### The Rule Keeper: Call Webhooks

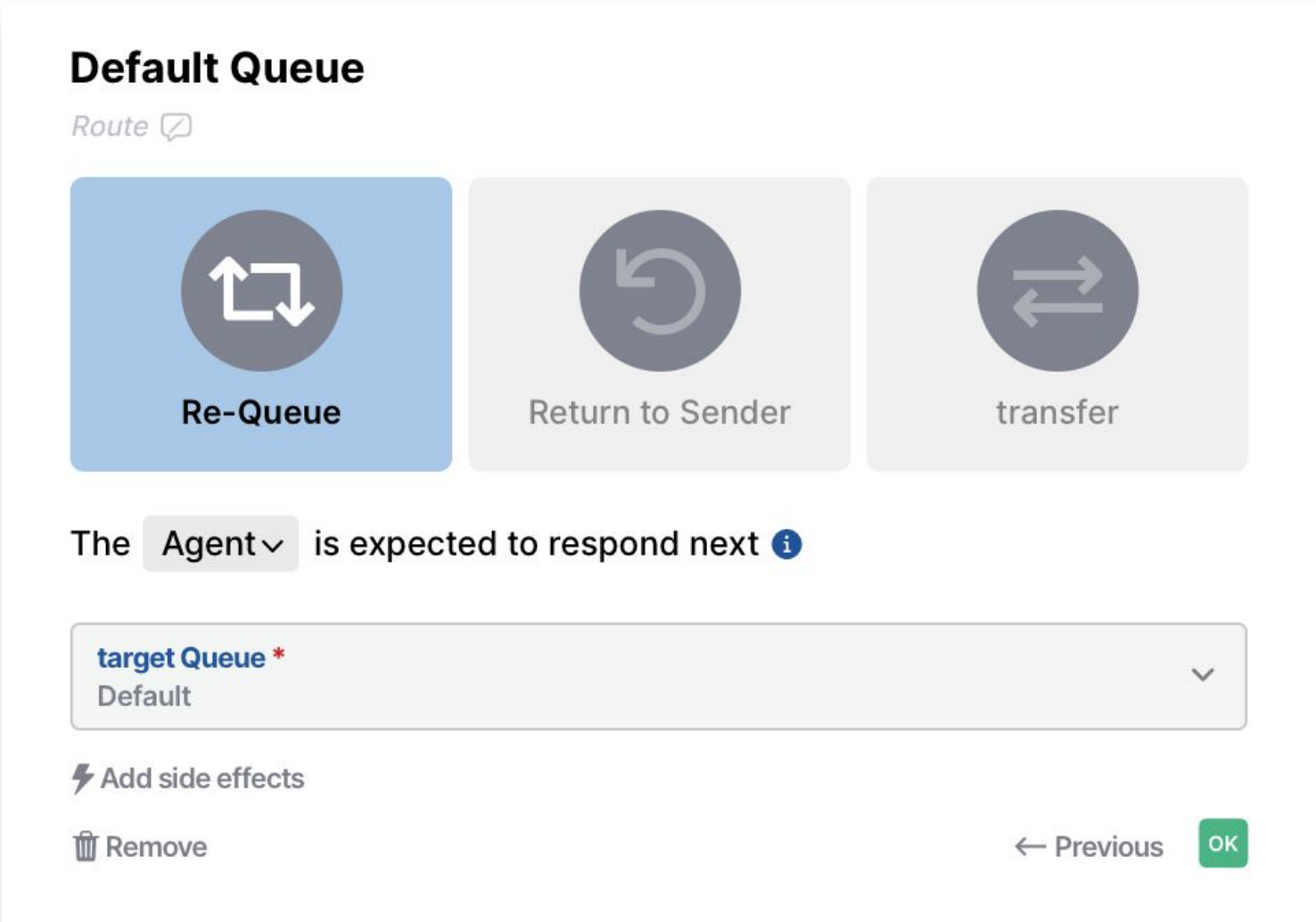
Call webhooks are the gateway to a bot communicating with external systems. The webhook allows us to call out to external systems. For example, you could use a webhook node to pull in information about a customer's most recent order from your order management system.

Although the term webhook may be new to you, you'll be surprised to know that Quiq's been using them for years to help applications translate and take specific action during a specific event, such as an online customer request.



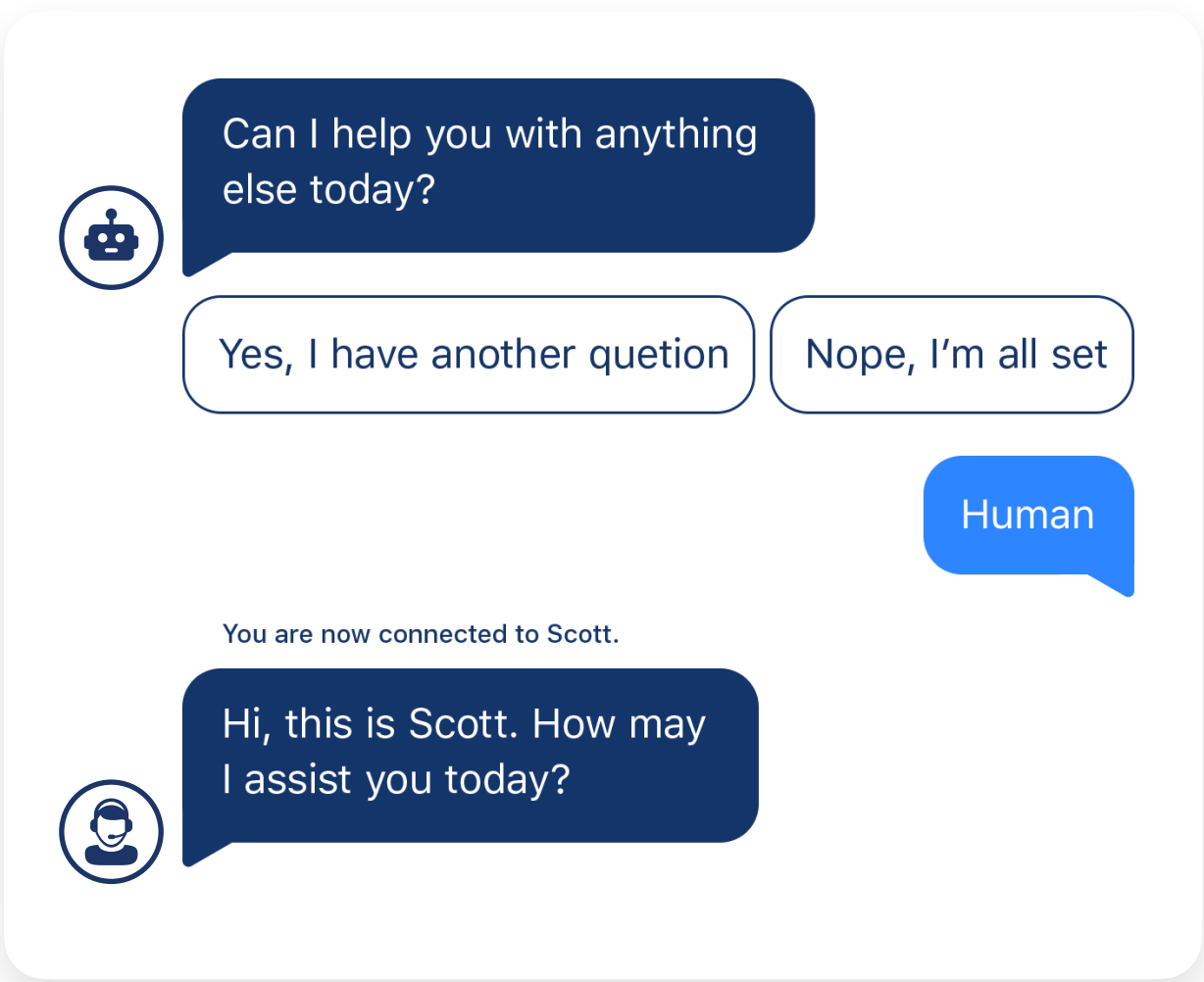
Route to Human Agent

This route is where we exit the bot’s flow and hand the conversation to another queue or user, and sometimes another bot with a more appropriate role (welcome/routing, concierge, or troubleshooting). One common routing use case is using the bot to determine what type of issue the user has (i.e., Is it a sales related request or a service related request?) and then seamlessly routing to the appropriate team.



This is a visual example of how Quiq’s route system works.

At any time in the bot’s flow, route to a human by simply typing “human.”

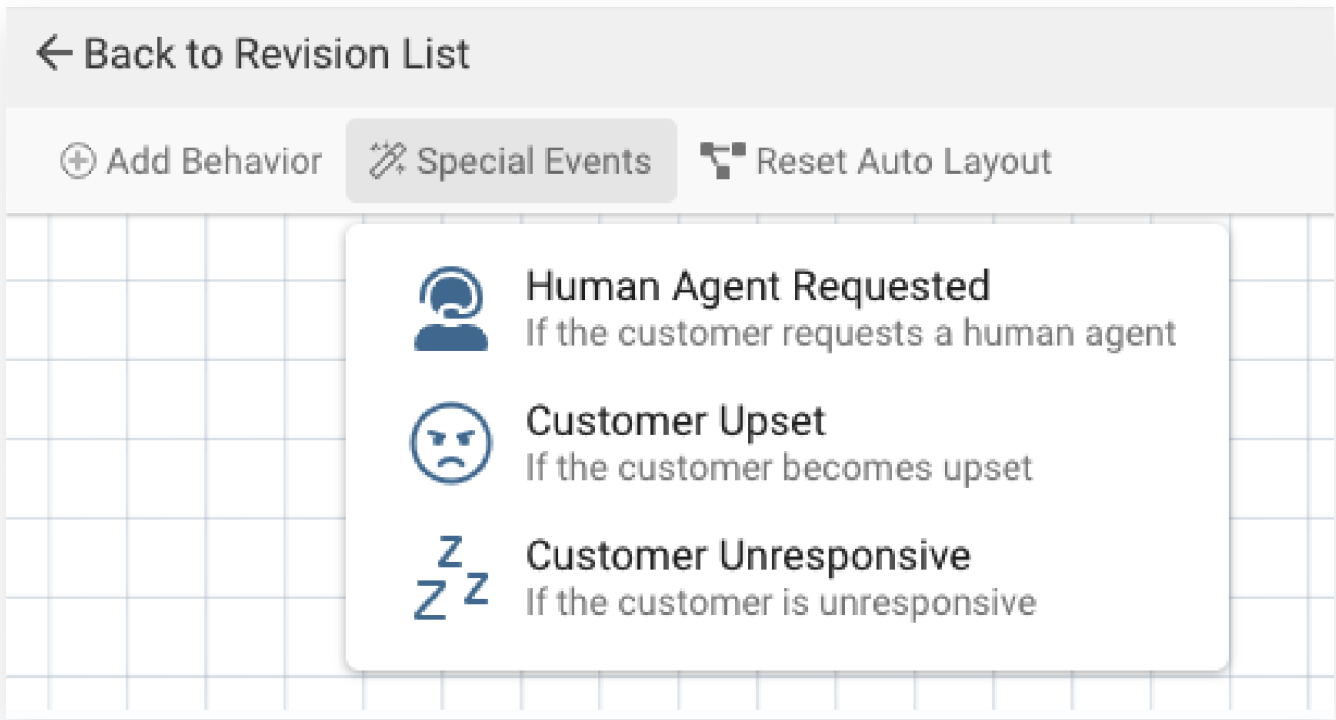


Customer Upset

Using AI, determine if a customer becomes upset within the bot’s flow and act immediately.

Customer Unresponsive

If the customer becomes unresponsive within the bot’s flow, determine an appropriate action like shown here:



Quiq Tip

Special Events

Special Events are powerful events that monitor the entire conversation between a customer and the bot. These events will trigger regardless of where the customer is in the bot conversation—definitely a must use for your bot.





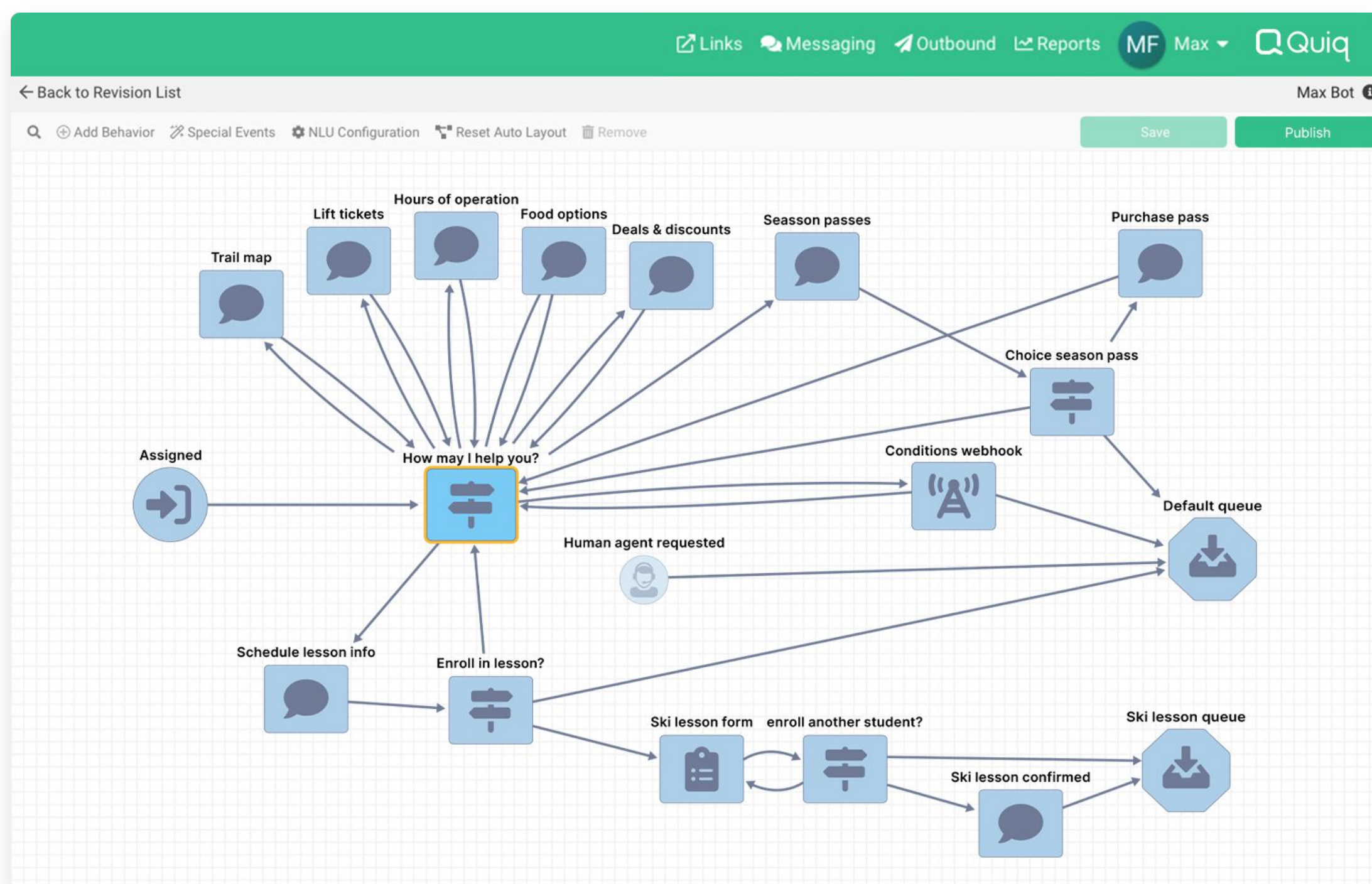
## Creating a Conversation Flow

Now that you understand the rules that a bot uses to engage with your customer, let's look at how you'll use those behaviors to create a conversation flow.

### Nodes

When you've configured your bot, you'll need to define node behaviors and events.

There are several types of behaviors and events you can configure—here are some examples.



You can see that each node serves a purpose, such as, “How can I help you?” and lift tickets to getting trail map info.

### Intent Behavior

A good starting point is intent behavior. This type of node is frequently used as the first node in a bot workflow. The determined intent behavior makes it easy for you to figure out what the customer's current motive is and move to other behaviors appropriately.

An intent behavior is a good first location for any bot that directly receives conversations from customers. An example of the determined intent behavior is shown at right. This particular node requires you to define three things:

- How to ask the customer about what they need help with
- The possible intents that can be matched and their corresponding behaviors
- How the bot should behave if it cannot determine the intent



For each behavior, you'll define the content and context of each node.

### How can we help you?

*Determine intent*

Prompt the user for their intent

**Message \***

How can I help you today?

Re-Prompt the user for their intent

**Message \***

Is there anything else i can help you with?

☒ Send a different message if the customer returns to this location

☐ Always ask the user for their intent even if it can be determined from a previous message

Intents

Order Status	<div><b>Move to *</b> Please enter your order</div> <div>+ v &gt;</div>
Cancel Order	<div><b>Move to *</b> Please enter your order</div> <div>+ v &gt;</div>
Product info	<div><b>Move to *</b> Default Queue</div> <div>+ v &gt;</div>
Privacy Policy	<div><b>Move to *</b> Please enter your order</div> <div>+ v &gt;</div>

Remove

← Previous

OK

Node to Self: This is Complicated

Nodes can seem even more complicated than experience mapping and logic execution, which is why at this point, you might not even need Section Three: Building Your Bot Team to understand you're going to need outside expertise to build your bot. Quiq is here for you and we've been doing this work for a long time. We know nodes! Contact [marketing@quiq.com](mailto:marketing@quiq.com) and we'll get started.



Questionnaire #2

What’s the Scope?

Fill out this questionnaire to help you better understand what you want and need your bot to do for your business. The information you come up with will help you define your bot project scope that makes the most sense for your business now and in the future.

Pro tip: Fill out this questionnaire for each bot you plan to build.

- Bot name \_\_\_\_\_  
**Why name your bot?** Naming your bot and giving it a unique voice and personality generates internal excitement. It also helps build rapport with customers who repeatedly interact with it. For example, Bob’s Discount Furniture named theirs BobBot and Daily Harvest, Sage.
- Replacing an existing bot?  
☐ Yes    ☐ No
- Do you have an existing internal resource or team that can “own” the bot project?  
☐ Yes    ☐ No
- Name of bot owner \_\_\_\_\_ Title \_\_\_\_\_
- What digital channels do you want your bot(s) to be a part of? (Examples: Instagram Direct Message, Facebook Messenger, WhatsApp?, SMS, and web) \_\_\_\_\_  
\_\_\_\_\_
- What do you see as the underlying business driver and benefit of having a bot(s) available to your customers? \_\_\_\_\_  
\_\_\_\_\_
- What KPIs are you hoping to achieve? \_\_\_\_\_  
\_\_\_\_\_
- Is there a backend system that you’re hoping to integrate your bot into?  
☐ Yes    ☐ No
- Name of system \_\_\_\_\_
- Public API?  
☐ Yes    ☐ No





## Step 3

# Building Your Bot Team

### Putting the Right Experts in the Right Seats

Some of the most frequent and most important questions we get from new clients at Quiq are about who needs to be a part of their chatbot project internally and when to get outside help..

We'd love to have concrete answers for you right here, but the best we can offer you is this: Building a chatbot program at your business depends on your goals, the size of your company, how you plan to scale, and a whole host of other factors.

Putting the right experts in the right seats is an important discussion that starts with your operations team. [Think of Quiq as an extension of your team with always-on experts available to support and augment what your project requires.](#)

If you took the questionnaire in section two, "What's the Scope?," you should have a surface-level understanding of what you want your bot to do for your business.

Next, you will want to get a better idea of what you need to actually build your bot team — the people resources, the budget, the timeline, etc.

In this section, we'll explore:

- Building the ideal bot team
- When to hire outside expertise and resources

We end this section with another questionnaire that will help you further validate a chatbot is right for your business. We encourage you to share this questionnaire with members of your team, just in case they aren't yet on board with a bot build.



## Building the Ideal Bot Team

Now that you know how wide-reaching the benefits can be when you add a chatbot program to your conversational commerce plans, it's time to consider who it's going to take to make it actually happen.

Depending on the size and scope of your current and future plans, building your bot team can require assembling an entirely new department to ensure seamless integration and management.

## Team Structure

We recommend that your Operations team helps oversee the overall chatbot program, because those are the people who know how the project will affect internal workflow. They can also help you find people already on your staff that might be good candidates for the chatbot team.



Lead Roles

<p><b>Bot owner</b></p> <ul style="list-style-type: none"><li>• Oversees project from start to finish.</li><li>• Manages timelines.</li><li>• Ensures everyone has what they need for their roles.</li><li>• Tracks and reports on data and analytics for continuous improvement.</li></ul> <p>A good bot owner typically has strong project management skills and an acumen for evolving a product from early-stage development to a fully scalable service.</p>	<p><b>Sales and customer service</b></p> <ul style="list-style-type: none"><li>• Identifies sales and service goals.</li><li>• Gives feedback on customer engagement.</li></ul> <p>Sales and Customer Service team members are critical in the development of a good chatbot program because they're the ones who will most use the service to engage and convert shoppers.</p>	<p><b>Conversation designer</b></p> <ul style="list-style-type: none"><li>• Designs conversational flow.</li><li>• Updates and improves flow.</li><li>• Works with content team to enable optimal virtual agents.</li></ul> <p>Conversational designers are the ones who lead bot designing and building.</p>
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Other Important Roles

<p><b>Branding and content</b></p> <ul style="list-style-type: none"><li>• Oversees brand continuity.</li><li>• Writes conversational scripts.</li><li>• Designs graphics and bot personas.</li></ul>	<p><b>Legal</b></p> <ul style="list-style-type: none"><li>• Ensures compliance and security standards are in place.</li></ul>	<p><b>IT/security</b></p> <ul style="list-style-type: none"><li>• Maintains compliance and security.</li><li>• Develops webhooks and other highly technical assets.</li><li>• Fixes errors and continuously makes improvements.</li></ul>
<p><b>Marketing, digital and CRM</b></p> <ul style="list-style-type: none"><li>• Collaborates with sales and CS to develop entry points for your bot across search, social, the website email and even your native app.</li></ul>	<p><b>Social media strategists</b></p> <ul style="list-style-type: none"><li>• Looks for new places to implement chatbots based on where customers are shopping.</li><li>• Understands where shoppers are engaging.</li></ul>	<p>IT/Security and Devs teams are the technical architects of a bot program.</p>





## When to Hire Outside Expertise and Resources

For a lot of smaller companies and startups just gaining traction in the e-commerce game, hiring a complete team to manage a chatbot program might not be feasible. Or, for most larger companies, pulling team members out of roles seems unrealistic.

In either case, consider hiring outside experts with resources like Quiq, to help you build, manage, and monitor your chatbot program.

And if you’re planning to implement NLP without dedicated resources, you definitely need to seek an expert partner like Quiq.

### A Quiq Pitch

Conversational customer care is our thing at Quiq, and we have the dream team that creates, customizes, enables, manages, and constantly improves chatbots for companies of all sizes, verticals, hopes, wishes, and dreams.

We can’t emphasize enough how important it is to have the right team in place from the beginning of your chatbot project. **And in case you were curious, we have three bot-building partnership tiers:**

	1. DIY (Do It Yourself)	2. Quiq Assists (We Help You Build)	3. Guaranteed Success (We Guarantee the Outcome*)
Best if you...	...have internal expertise and resources available to build automation.	...have internal resources available but lack the expertise to build your own automation.	...want Quiq to do all the work & deliver guaranteed business outcomes.
Quiq provides...	...access to the Quiq Bot Designer.	...access to the Quiq Bot Designer, and our Google DialogFlow integration.  ...project management, conversational design, and integration consultation (pool of hours for each, additional can be purchased).	...everything from the previous two tiers plus implementations that feature proactive AI and rich NLP strategies.
You pay for...	Usage fees	Assisted Build Package fee + usage fees	Guaranteed Success fee + usage fees

*\*Quiq and the client will agree on 1-3 success metrics to be achieved within the first year. (These can be modified post-close.) If the success metrics are not achieved, the fees associated with Guaranteed Success will be waived in the following renewal period (usage fees still apply)*



**Quiq Tip****Baby Steps Vs. Taking the Leap — Neither Approach is Wrong****When To Take Baby Steps**

- Your company is young and you're just out of MVP stage
- You can't afford to hire internally or external support

If you're in this boat, we recommend that you start by envisioning just one simple bot at this time. It will allow you to test the value of a bot, while you continue to grow your business. You'll gain a better understanding of what chatbots you'd like to implement in the future when it's the right time for you to do so. Quiq's DIY tier is a perfect fit for dipping your toe in.

**When To Take The Leap**

- You're ready to reach more customers with greater intent than ever before
- You have internal experts or the budget to hire external support (ideally both)

Our advice if you're in this position is to reach out to Quiq and talk to us about our partnership tiers. We can work with you to figure out what you need.



### Questionnaire #3

## Build Your Bot Team

This final questionnaire is meant to help you better understand the resources you'll need to build an effective bot team at your business. Once you've filled it out, share with your team for further collaboration, and know you can always reach out to the team at Quig for more insights.

- Do you have someone in-house who can fulfill a full-time role as the bot owner?  
☐ Yes    ☐ No
- Does your sales and customer service team have capacity to help build the chatbots alongside your bot owner and devs team?  
☐ Yes    ☐ No
- Will your branding, content, design, inbound, and social media team members have time to build assets necessary to the customer-facing bot interface?  
☐ Yes    ☐ No
- Do you have an AI expert on staff?  
☐ Yes    ☐ No
- Will your legal team know how to help protect your business if it implements AI conversational commerce?  
☐ Yes    ☐ No
- Does your operations team believe in the work?  
☐ Yes    ☐ No
- Do you believe hiring outside help would improve your chances of success?  
☐ Yes    ☐ No
- And finally, do you believe in unicorns? 🦄  
☐ Yes    ☐ No





# Contact Quiq

## **Thank You for Reading About Chatbots and How Quiq Enables Conversational Care and Commerce**

We hope you've learned valuable information that helps you decide when it's time to build chatbots for your business.

As you now know, there's a lot that goes into building, enabling, and managing chatbots, but they're absolute game-changers for businesses operating in all verticals, especially those in the e-commerce market. Regardless, our next best advice is to reach out to us and discuss what questions you have after reading this playbook—and what we can do to elevate your business with bots!

Email: [marketing@quiq.com](mailto:marketing@quiq.com)



# Glossary

## **Artificial Intelligence (AI)**

Systems, programs and technology that can mimic human behavior the more it engages in human interaction. Often used to supplement communications needs between businesses and customers.

## **Behaviors and special events**

Customer language the bot is programmed to recognize and then act accordingly from.

## **Asynchronous messaging**

A messaging system that lets a person or AI component start, stop or pause a conversation thread at any time and pick it up later.

## **Conversational care**

A mode of resolving customer needs and boosting customer satisfaction metrics through personalized conversations conducted via voice recognition, instant messaging, SMS texting, and AI tech.

## **Conversational commerce**

A mode of creating engagement and boosting sales through personalized conversations conducted via voice recognition, instant messaging, SMS texting, and AI tech.

## **Conversation workflow**

The custom “map” that illustrates how and when a chatbot will engage with a customer in conversation.

## **Experience mapping**

The process of developing a conversation workflow.

## **Natural Language Processing (NLP)**

Chatbot technology that translates user intent so the bot can understand how to respond and what to do next.

## **Unicorns**

Gorgeous, glittery, four-legged beings that humans believe can solve all their problems; see also “mythological beings.”

## **Virtual agents**

Another term for a chatbot that uses artificial intelligence.





Visit **quiq.com** for a demo today!