9 EASY STEPS TO BUILD YOUR CHATBOT

DECIDE THE TYPE OF CHATBOT

In the first step of building your bot, you need to decide what type of chatbot you want to build.

This is determined by your business objectives and your customers needs.

Answering the following questions will help you get started:

- What challenge is your chatbot solving?
- What purpose will your chatbot serve?
- What is your goal? Are you trying to increase conversions or looking to serve your customer better around the clock?

- Who are you targeting with the bot? All your visitors or specific ones?
- What content/value can you use to catch visitor's attention to start interacting with the bot?

Examples of chatbots

FAQ bot

Navigation bot

Customer feedback bot

Newsletter subscription bot

Lead magnet bot

Demo booking bot

Product promotion bot

DECIDE THE TYPE OF CHATBOT

Typically, there are two main types of bots - ones that help support and serve customers and ones used to generate leads.

Don't get us wrong though, bots can serve multiple purposes too! But keeping your main objective at the forefront, will help you stay on track when you're building your bot.

In the next part, we explain the two types bots and what you need to consider when building each bot:

Chatbot for customer service

Chatbots for customer service allow you to provide 24/7 support helping your website visitors self-serve and find solutions to their questions.

It can help decrease the amount of incoming customer contacts and save your team's time for more pressing issues.

Customer service chatbots can also direct customers to the information they are looking for, and help them find additional services.

When building a support chatbot, consider the following:

- What are the most important contact points where customers need help in their journey?
- How can you tackle these outside of office hours or when your chat is offline?
- How does the bot work with your live chat solution during office and offline hours?
- Is there a high frequency of repetitive questions from customers?

DECIDE THE TYPE OF CHATBOT

Lead Generation Chatbot

Lead generation chatbots help you maximize your sales potential and increase conversions online.

They can help you get more qualified leads, whilst ensuring a great customer experience.

The data gathered in your bot can also further help you understand your target audience and gain insight into what your customers are looking for.

When building a chatbot for lead generation, ask yourself the following:

- What problem are you trying to solve: Increasing lead quantity, quality, or both?
- What are the best pages to get customers to reach out to us?
- Which static forms are not performing and could be replaced?
- What stages of the marketing funnel do you want to use the bot for?

Check out different bot use cases for inspiration here

DETERMINE YOUR KPIs

At this point of building your bot, it's important to determine your key performance indicators (aka KPIs) to understand what you want to achieve from it.

- How will you know if the chatbot is successful?
- What are you going to measure?
- What results do you want to track?

Your KPIs are directly connected to what the goal of your interaction is. It should be clear and measurable.

Your bot's goal is the action you want your user to take. This could be a CTA button or link click, a form fill, or a completed online purchase. The KPIs you've set are the metrics used to track that goal (more on this in step 9).
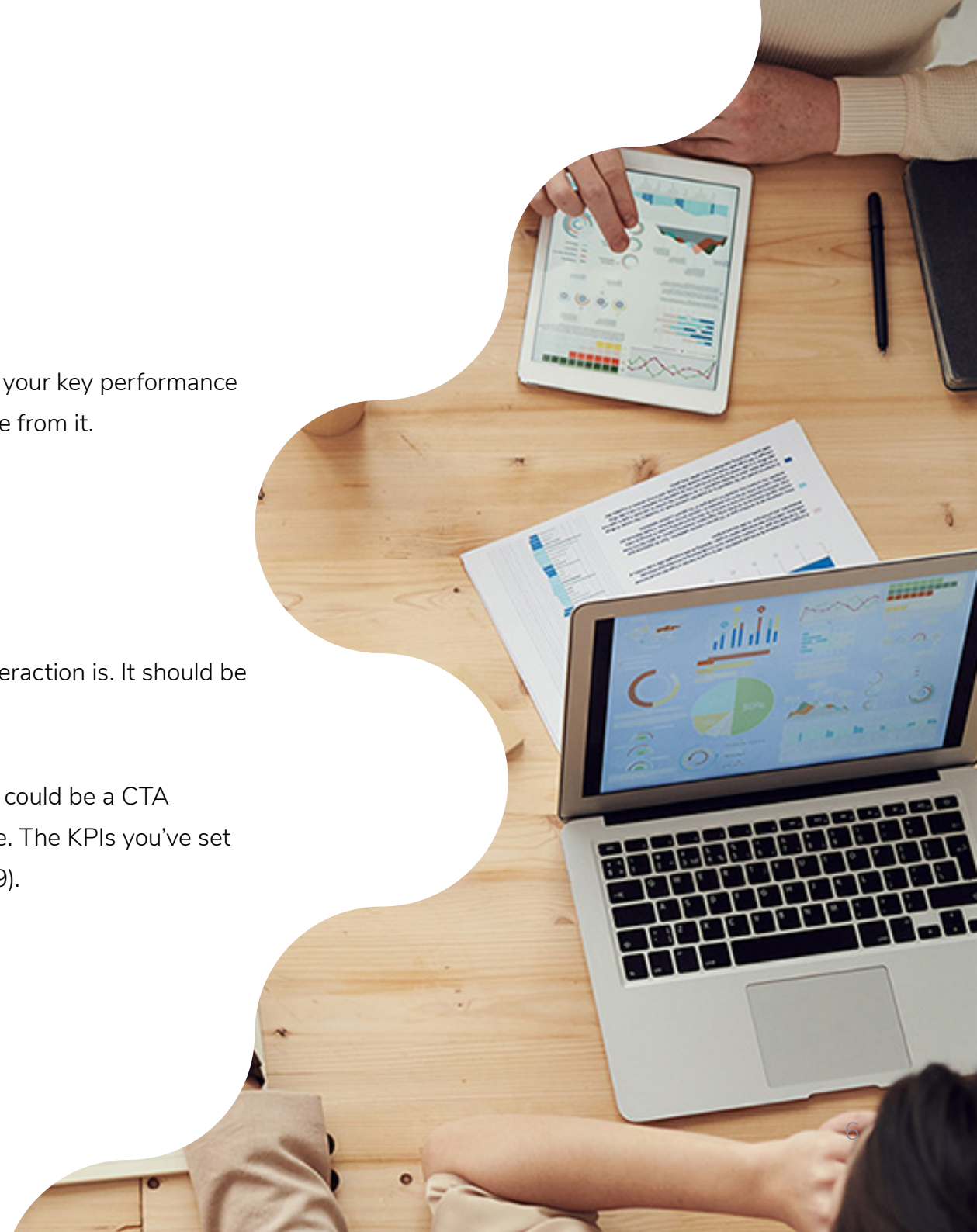
UNDERSTAND USER NEEDS

After defining your objectives, it's time to align this with your audience.

Start by defining who your bot user is. This will help you formulate the right questions and generate content that meets your website visitor needs.

Answering the following questions can help you do this:

- What kind of person will use your bot?
- What are the user's goals the moment they decide to interact with the bot?
- What are your potential bot users looking for?

Create a bot "user persona"

Build your user profile based on your buyer personas and write a one-sentence summary:

- Describe the user profile
- The purpose of their visit
- The benefits of using your bot

Example:

A working professional, comes to her energy provider's website on desktop during office hours, to find out how to make her first payment. Using the bot, she can find out how to do it within minutes, without interrupting her work day.

CHATBOT WORKSHOP

Having trouble getting started? Try this! Organise a workshop online or in person with your project team. The goal of the workshop is to help you identify a clear scope for your bot, helping you align what you are building, for whom and why.

1. **Start by individually writing down on post-its your ideas of who will be using your bot**

   - Define the user and what they looking for

2. **Next, as a team map out your ideas into axis**

   - The ideas that bring value to the business
   - The ideas that bring value to your customers

3. **Finally, select the best idea that provides value to both your business and customers, and decide:**

   - Where will your bot be shown?
   - How would you realistically measure success?

GIVE YOUR BOT A PERSONA

Now, it's time to bring your bot to life by determining the tone of voice and defining your chatbot terminology. While doing this, try to develop the persona of your bot. It might help to think of your bot as a real person thats representing your brand.

It's important to keep a balance between your brand and what your audience wants.

While the tone of voice should follow your brand guidelines to build trust among your audience, the terminology should match the words your audience typically uses.
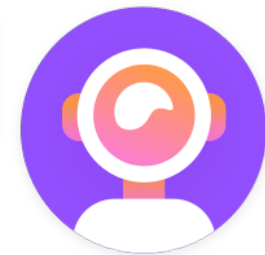
Think about the following:

- What kind of language will the bot use?
- Will your bot use emojis and/or images?
- Is your bot polite and professional or more relaxed and witty?

Hey there! 👋 Need help?

Hello! I'm Helper Bot. How can I help you?

PLAN YOUR BOT FLOW

Start to visualise your bot flow and how each view of your bot will look. Your flow will become the foundation for building your bot interactions.

1. Create a diagram of your bot conversation

You could do this on a piece of paper, in Powerpoint or within [giosg](#). It should look like a decision tree and contain all the views your bot will have.

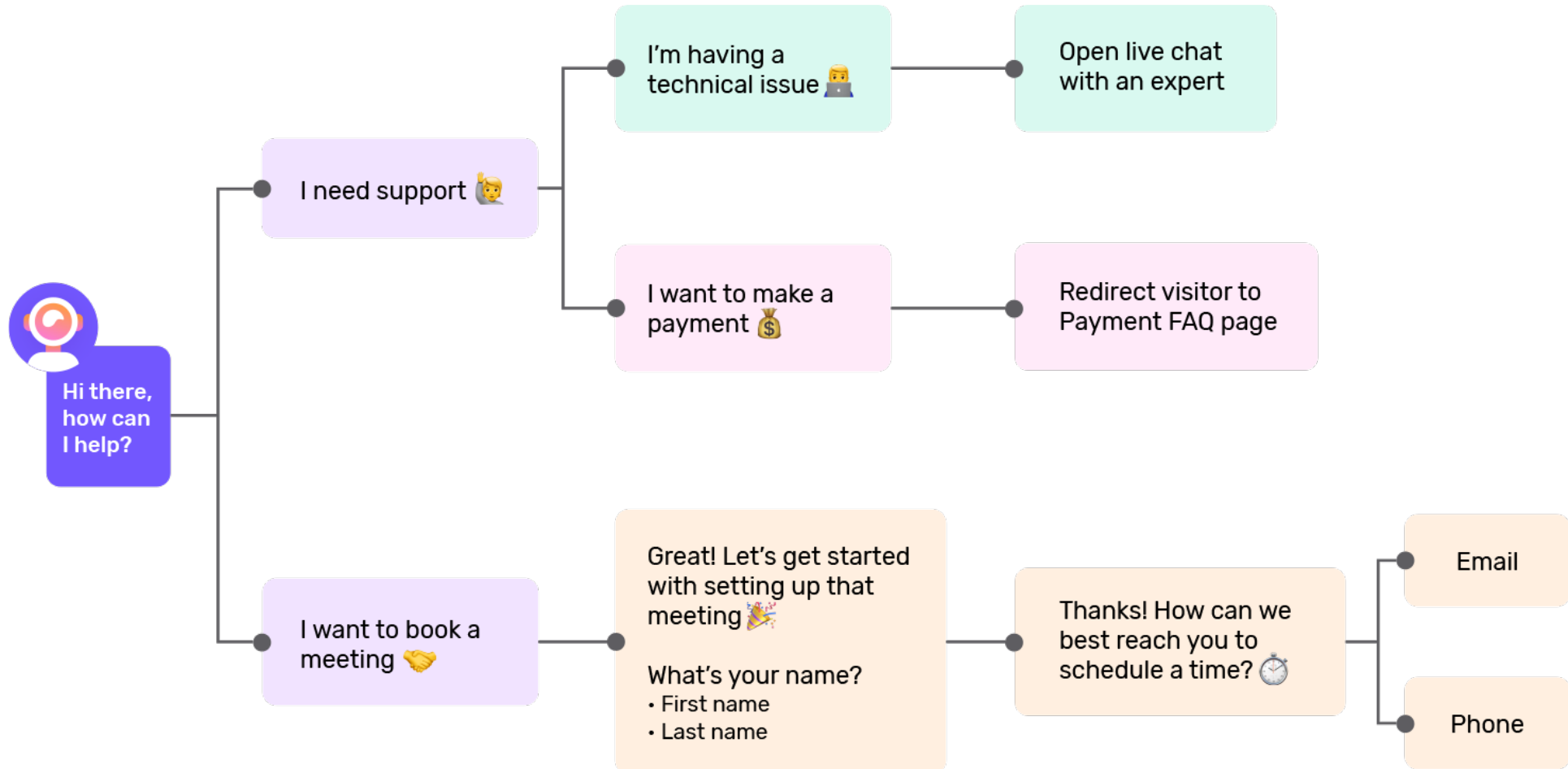### 2. Plan what elements each view will contain

You bot could include buttons, links, images, videos, text answers, text boxes/ typing fields, multiple choice fields, or dropdown menus.

3. Think about the design & branding of the interaction

What ideas come to mind that suit your company image and the purpose of this chatbot?

BOT FLOW EXAMPLE

Hi there, how can I help?

I need support 🙋

I'm having a technical issue 👨‍💻

Open live chat with an expert

I want to make a payment 💰

Redirect visitor to Payment FAQ page

I want to book a meeting 🤝

Great! Let's get started with setting up that meeting 🎉

What's your name?
• First name
• Last name

Thanks! How can we best reach you to schedule a time? ⏱️

Email

Phone

DESIGN YOUR BOT

Finally, it's time to put your plans into action and start designing your bot!

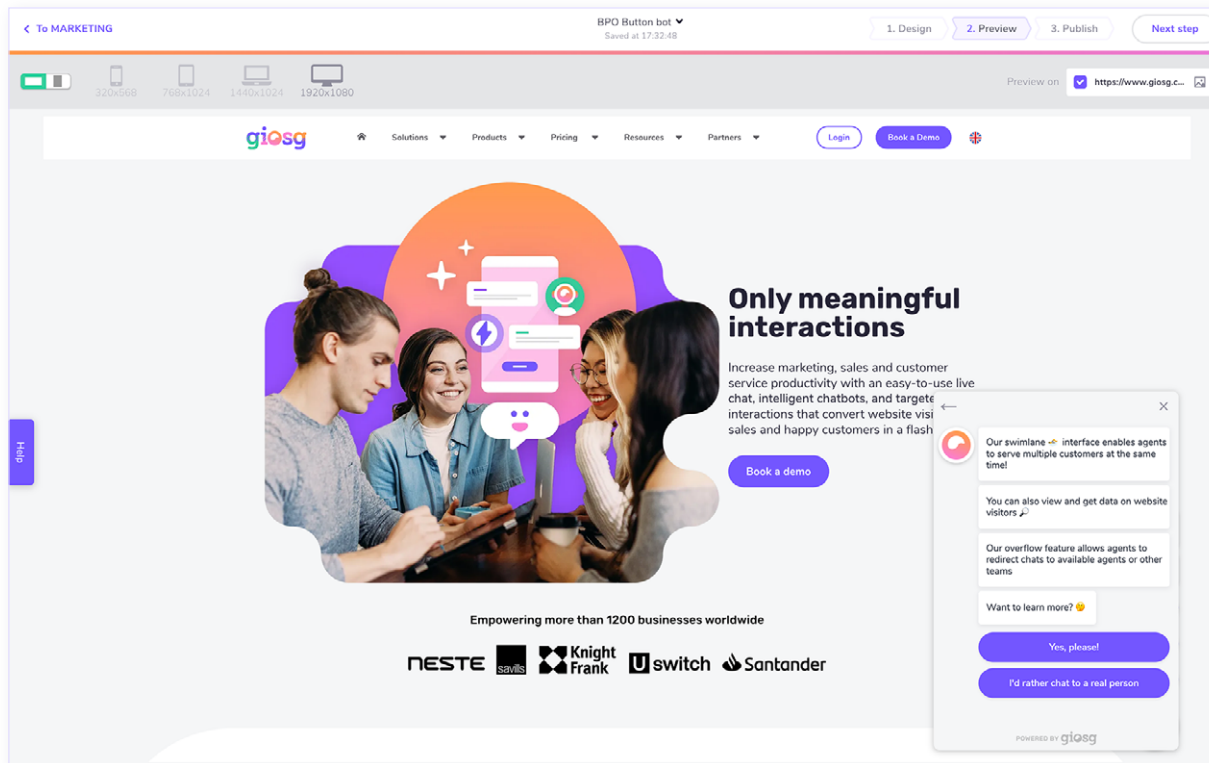You can decide to go with a ready-to-use bot template or start designing your bot from scratch.

Here's what you'll need to do:

1. Create or modify your views
2. Modify colours and fonts
3. Set up your button and element actions
4. Set up your goals
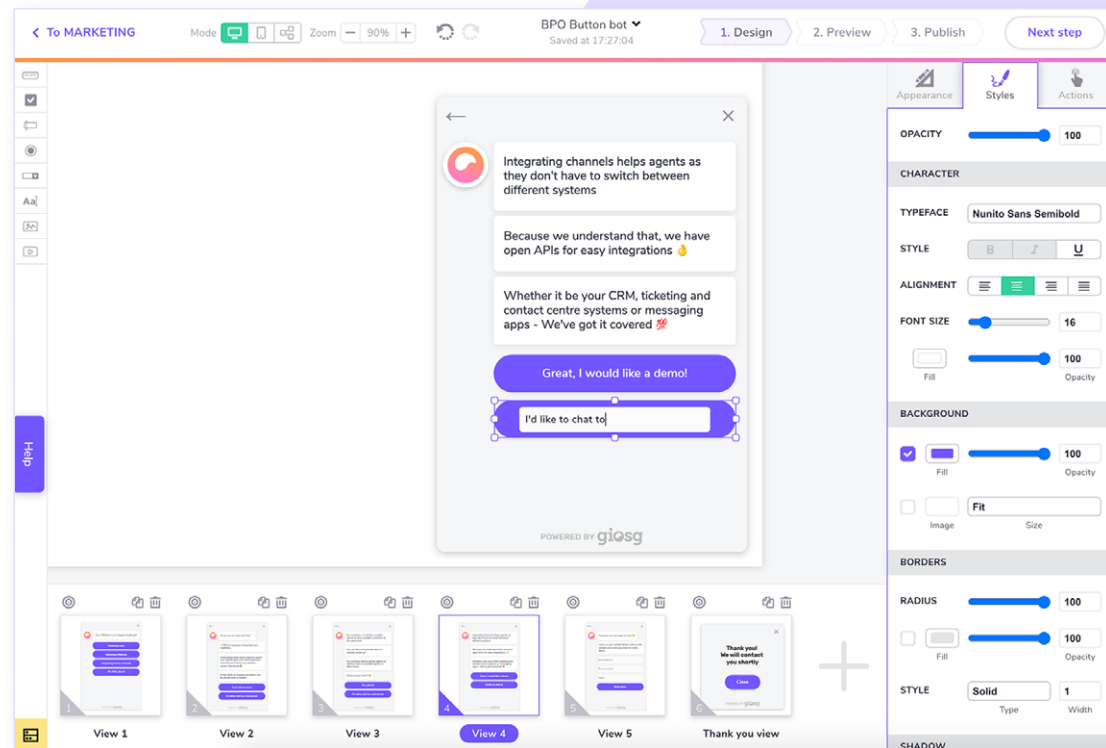
PREVIEW AND TEST

Before your bot is live, you'll want to test it out in preview mode.

In preview mode you can:

- Check what your bot looks like on your desired page.
- **Make sure your flow works and the views are in the correct order.**
- Ensure all the actions you've set up work as they should.
- See what your bot will look like on different screens and/or devices.

If something's not right, go back to design mode and make your corrections!

TARGET YOUR BOT

In the planning stage, you already considered where you want your bot to be placed and who to show it to. It's time to put your targeting plans into action.

There's a wide set of automatic triggers that can be used to target your bot, from the visitor's page, to their purchase history and so on.

You can decide to target your bot according to multiple criteria or just one.

Here are just a few targeting options:

- Which page the visitor is on
- Where they came from: previous page, campaign URL, traffic source
- The geographical location of the visitor
- What device they are using - desktop, mobile or tablet
- The number of times they have been on your website

Targeting best practice

Struggling to come up with ideas? Try these simple targeting rules:

- Visitor's country, if you have multiple language versions
- Visitor's device, if you've designed your bot specifically for desktop use only.
- Visitor's current URL, to make sure the bot is in the right place on your website.

The amount of targeting rules will depend on your bot package.

MEASURE AND OPTIMISE

Remember in the second step, when you decided your KPIs? Now that your bot is live and in use, it's time to start measuring it's performance. This will help you optimise your content and consistently improve results.

Here are a few bot metrics that you could track:

Chatbot activity: How frequently is it being used?

Bounce rate: What is the rate of users that bounce without taking the desired actions?

This will help you see at what points of the bot journey users drop off and identify **potential bottlenecks** in your bot.

Goal completion: What is the success rate of a given action performed through your bot? How many users complete your specific goal?

Effectiveness: How many users were able get the help they needed through your bot, without having to contact your customer service?

Not only is it important to track quantitative results, it's also worth gathering feedback from your users:

- What your users think about your bot?
- Are they satisfied with the service it provides?
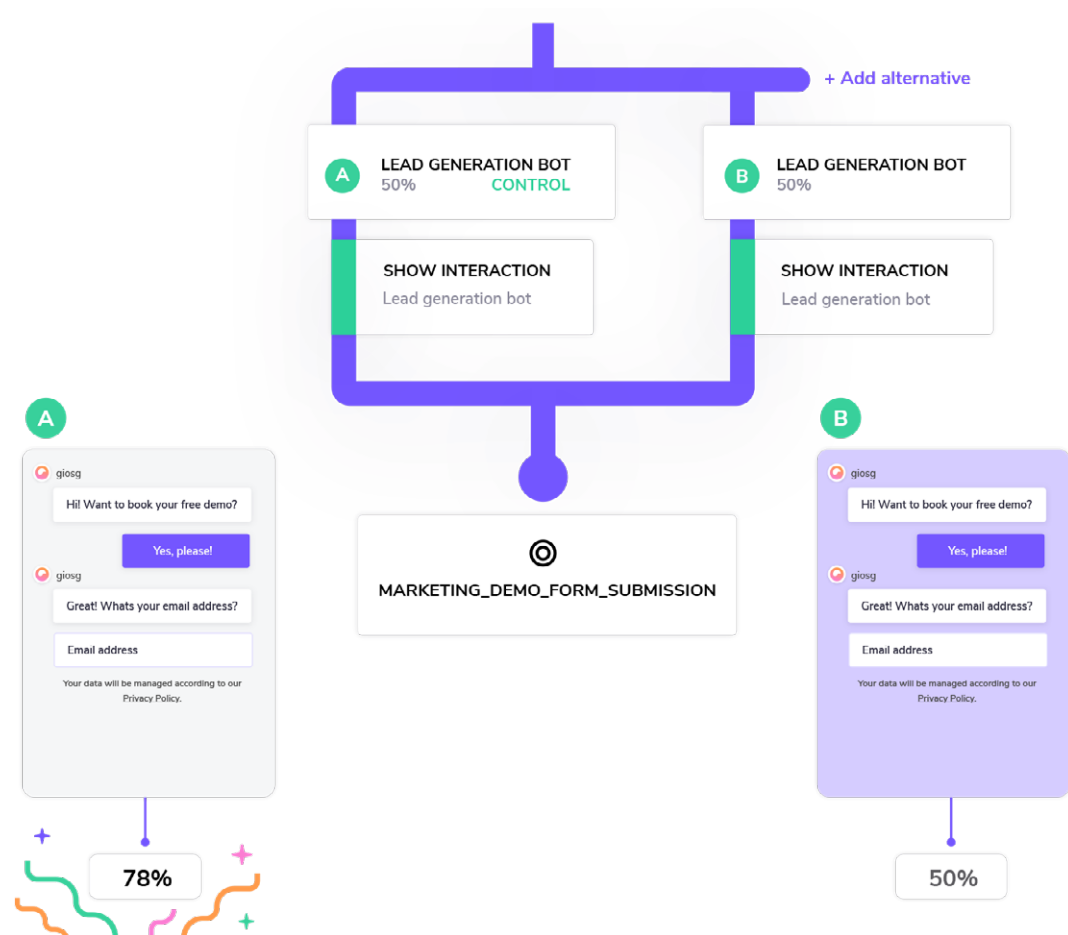- Are they taking full advantage of the tool?
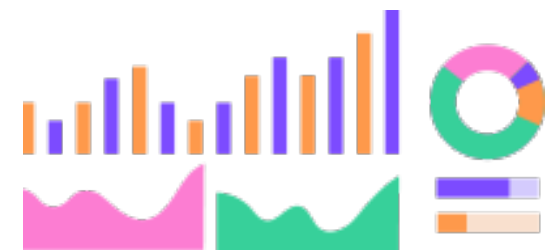
MEASURE AND OPTIMISE

Setting up A/B testing can also help you further optimise your bot results and determine which targeting is the most effective.

Testing can show you which leads respond to your chatbot messaging, on which page and at what moment of time, allowing you to consistently update and improve your bot.

READY TO BUILD YOUR FIRST BOT?

There you have it - nine easy steps to building a chatbot!

With a tool like giosg Interaction Designer creating your first bot couldn't get simpler. So why not get started with our free trial?

You can start from our chatbot templates or from scratch to realise your own vision.

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