



David Hughes, Digital Chorus Limited  
email. david@digitalchorus.co.uk | mob. 07989333563

## [ Your Company ] AI Chat Assistant (engagement sheet)

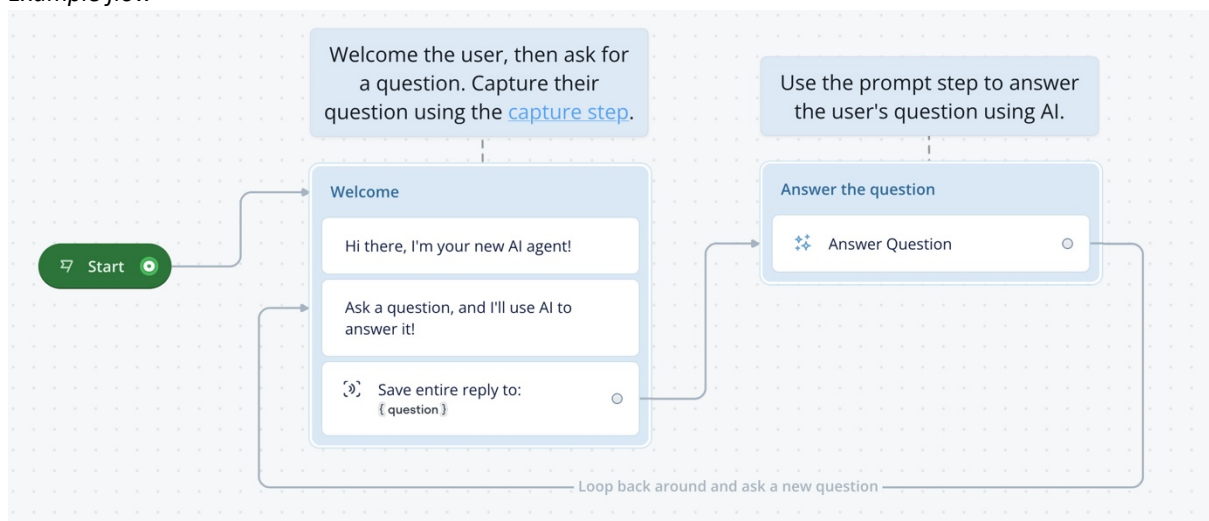
Hi, please take a look at the information below and fill in the details where possible. If you're pressed for time, I'd be happy to walk through the form with you, so we can fill it in together.

### Solution

The chatbot solution we will be using is Voiceflow. <https://www.voiceflow.com>

*"Voiceflow is a no-code platform for designing, prototyping, and deploying conversational AI assistants. It allows users to build AI-driven conversations using a visual drag-and-drop interface, making it easier to create and manage complex conversational flows without needing to write extensive code."*

### Example flow



- Your chatbot will be fully customised, and will be coded to understand the 'sentiment' or 'tone' of the user and will respond accordingly.
- The chatbot will only answer questions relevant to your charity, and will decline to answer others, in a friendly manner.
- The chatbot will operate from a 'knowledge base' coming from your content, and will be updated on a regular basis.

## Approach

*The following is a typical approach we could adopt from start to finish. It's not fixed, and doesn't need to be time-consuming. If you or your team are available to work with me closely on this, **we could get the whole thing done in 1-2 weeks.***

**1. Discussion. Understand objectives, goals and timelines.**

Introductions. Discuss initial goals. Determine success factors, such as time savings or improved engagement.

**2. Create limited functionality demo.**

Initial view of the chat agent, which will answer basic questions, and will convey 'tone' of the response, and types of responses.

**3. Review/sign off agreement**

Once you have seen the demo and have a full appreciation of the solution to be provided, we then both sign a simple agreement and terms. Sign NDA if application. Initial payment.

**4. Capture chat functionality and workflow**

Allow 1-2hour session to capture the 'flow' of the chat, and the determine how to handle different questions/scenarios. The chatbot will be programmed according to this flow.

**5. Test, test, test**

Testing can be done on the Voiceflow service in terms of the chat response. In terms of testing the integration it would be useful to embed the agent into a demo page or sandbox site, to determine if there are going to be any technical integration issues that need to be addressed.

**6. Implement on live site**

Move the agent into the live website, and monitor in real-time. Allow up to 1 week to settle in, and to 'fine-tune' where needed.

**7. Sign off**

Once you are happy with the integration, final payment to be made. We then move into support/maintenance phase.

## Comments, if any, regarding the above approach

*Add any detail regarding the approach, add new steps, or include timeline etc*

**What is your website domain?**

https://

**What are the main questions/enquiries you receive on your website?**

*It's possible additional time will be spent programming the chatbot to respond specifically to the questions outlined below.*

- 1.
- 2.
- 3.
- 4.
- 5.

**How many visitors do you get to your website approximately?**

/ monthly unique visitors

**Do you have any concerns about using AI?**

**What information that is currently on your website do you NOT want the chatbot to engage with?**

*ie. Is there any sensitive information or topics that you don't want the chatbot to engage with?*

*If 'yes', please provide details, and any links to the information on the website you do not want to use in the knowledge base.*

**Are there any external sources of information, or other content that you want the chatbot to work with?**

*ie. If there are other website resources, or if you have any .pdf files or spreadsheets, I can include those in the knowledge base. Please provide details below.*

**Who should be involved with the chatbot project?**

*Please provide names and emails of anyone who needs to be included in any communication to do with the chatbot project. Also details of individuals that will be available for testing purposes, if different.*

**Do you need me to integrate the chatbot onto your website?**

*If 'yes', please provide details or contact information for the relevant person/company that has access to the website.*