



FREE CHECKLIST

The Complete Chatbot Requirements Checklist

Evaluate any chatbot vendor in minutes.
54 questions across 12 categories.

Printable

Vendor-neutral

Ready to use

1 Problem & Use Cases

- ☐ Have you defined one primary job for the chatbot in the first 3-6 months?
- ☐ Have you mapped specific use cases (support, sales, lead qualification, order tracking)?
- ☐ Have you set measurable success metrics (CSAT, resolution rate, conversion uplift)?
- ☐ Have you calculated target cost savings vs hiring additional staff?
- ☐ Have you identified which team owns the chatbot project?

Start with ONE primary job. Expand scope only after proving value in the first 3-6 months.

2 Conversational Intelligence

- ☐ Can it understand free text with typos and slang (NLU + intent detection)?
- ☐ Can it follow multi-turn conversations without losing context?
- ☐ Does it support automatic language detection and multilingual replies?
- ☐ Can it handle multiple intents in a single message?

3 Generative AI Capabilities

- ☐ Does it have hallucination controls to keep answers grounded in your real data?
- ☐ Does it use RAG to pull live data from your help center and product catalog?
- ☐ Can you set brand tone, presets, and banned phrases for consistency?

4 Operational Features

- ☐ Can it hand over to human agents with full conversation history?
- ☐ Does it create tagged tickets automatically?
- ☐ Can it run workflow tasks (address updates, CRM logs) directly from chat?
- ☐ Does it generate summaries for agents and handle offline fallback?

Ask vendors to demo a live handover. The transition should feel seamless to the customer.

5 Data Requirements

- ☐ Can it ingest your FAQ, knowledge base, and product catalog?
- ☐ Does it support both structured (database) and unstructured (PDF, web pages) data?
- ☐ Does it have version control and grounding sources for every answer?
- ☐ Is it GDPR, PDPA, and HIPAA compliant with clear data retention policies?
- ☐ Does it use role-based access control for data and content editing?

Ask vendors: "Where does the bot get its answers?" If they can't show you the source, that's a red flag.

6 Integration Requirements

- ☐ Does it embed on your website, mobile app, and social channels (WhatsApp, Messenger, Instagram)?
- ☐ Does it integrate with your CRM (HubSpot, Salesforce, Zoho)?
- ☐ Does it connect to your helpdesk (Chatty, Intercom, Gorgias, Freshdesk)?
- ☐ Does it sync with your ecommerce platform (Shopify, WooCommerce, Magento)?
- ☐ Can it perform actions like modifying orders, checking inventory, and generating quotes?
- ☐ Can it connect to internal databases and APIs through secure interfaces?

7 UX & Conversation Design

- ☐ Have you defined the bot's tone of voice and personalized greeting logic?
- ☐ Does it have clear happy paths with progress indicators for common tasks?
- ☐ Does it handle errors gracefully with suggestions (e.g., "Did you mean size M?")?
- ☐ Does it support buttons, quick replies, carousels, and image upload?
- ☐ Can users switch topics mid-chat without losing prior context?

8 Performance Requirements

- ☐ Does it respond in under 1.5 seconds end-to-end?
- ☐ Has it been load-tested for 10x normal traffic (e.g., Black Friday)?
- ☐ Does it auto-scale during peak seasons without manual intervention?
- ☐ Does it have outage fallback (queued mode or static messages)?
- ☐ Can you monitor session logs, intent confusion analytics, and deflection rate?

Target benchmarks: 99.9% uptime, sub-1.5s response, 70%+ deflection rate, 80%+ bot-handled volume.

9 Security Requirements

- ☐ Does it require authentication (login or OTP) for sensitive actions?
- ☐ Does it use role-based access control so each person only sees their scope?
- ☐ Are API keys stored in a secure vault with separate keys for test and production?
- ☐ Does it maintain audit logs and use HTTPS encryption for all traffic?

10 Human-in-the-Loop

- ☐ Is there a weekly content update routine for FAQs, policies, and products?
- ☐ Can you tag and review bad answers directly from transcripts?
- ☐ Are handover rules clearly defined (by intent, keywords, or confidence score)?
- ☐ Do agents get instant alerts with priority tags and full transcript on handover?

11 Implementation

- ☐ Do you have a phased roadmap (discovery, data prep, config, integration, testing, go-live)?
- ☐ Are stakeholder responsibilities mapped (product owner, designer, data, engineering)?
- ☐ Have you agreed on QA criteria (85-90% intent accuracy, less than 5% hallucination rate)?
- ☐ Do you have a rollback plan if launch metrics miss targets?

12 Cost & Budget

- ☐ Have you estimated LLM usage costs at your expected conversation volume?
- ☐ Have you budgeted for training, development, and ongoing tuning (15-20% of build cost/year)?
- ☐ Have you calculated cost per resolved ticket (bot vs human)?
- ☐ Have you modeled ROI including revenue uplift and repetitive task reduction?

Compare total chatbot cost to the equivalent of 1-2 full-time support agents. Most bots pay for themselves in 3-6 months.



Chatty checks **every box** on your list.

AI-first and Shopify-native. Multilingual support, built-in analytics, and sales automation included. Try it free and see for yourself.

✓ NLU + GPT-4 powered

✓ Learns your catalog

✓ Shopify-native

✓ Multichannel inbox

✓ GDPR compliant

✓ Free plan available

Try Chatty Free

apps.shopify.com/chatty

4.9/5

from 1,600+ reviews

95%

AI resolution rate

\$1M+

assisted revenue

chatty.net