



FREE TEMPLATE GUIDE

13 Chatbot Templates for **Real-World** Business Use

Ready-to-deploy conversation flows with triggers, logic paths, sample messages, and pro tips for every use case.

CUSTOMER SUPPORT — 1 OF 2

1. FAQ Bot

SUPPORT · DEFLECTION

Answers frequently asked questions to reduce repetitive tickets while delivering fast, accurate responses. Covers shipping, returns, payments, product specs, and warranty. The bot detects question intent, provides a direct answer, and offers follow-up options or escalation when needed.

TRIGGERS

- › Shipping information
- › Return policy
- › Payment options
- › Product specifications
- › Warranty questions

FLOW

- › Detect question intent from user message
- › Provide direct answer or clarification options
- › Ask follow-up if the query is ambiguous
- › Deliver final response or escalate to agent

SAMPLE MESSAGES

- Greeting:** "Hi! I can help answer common questions. What would you like to know?"
- Shipping:** "Standard shipping takes 3–5 business days. Express shipping is available at checkout for next-day delivery."
- Returns:** "You can return items within 30 days of delivery. Type 'Return Process' for step-by-step instructions."
- Payment:** "We accept credit cards, PayPal, and Apple Pay. All payments are processed securely."
- Fallback:** "I may need a human teammate to help with that. Want me to connect you?"

PRO TIP

Group your top 10 ticket types first. If the FAQ bot handles just those, you can deflect 40–60% of incoming volume on day one.

2. Troubleshooting Bot

SUPPORT · DIAGNOSTICS

Guides users through diagnosing and fixing common technical or operational problems. Walks them step-by-step from issue detection to resolution, confirms the fix worked, and escalates to technical support when self-service is not enough.

TRIGGERS

- › Device not working
- › App crash
- › Login issues
- › Connectivity problems
- › Payment failure

FLOW

- › Detect issue type from user description
- › Ask targeted diagnostic question
- › Analyze response and narrow cause
- › Provide step-by-step fix
- › Confirm resolution or escalate

SAMPLE MESSAGES

- Opening:** "Sorry you're having trouble. Let's fix this together."
- Diagnostic:** "Are you seeing an error message? If yes, can you share what it says?"
- Solution:** "Please restart the app and check your network connection. This resolves 80% of similar cases."
- Check:** "Did that solve the problem?"
- Escalation:** "Let me connect you with technical support. I'll pass along everything we've tried so you won't need to repeat yourself."

PRO TIP

Always confirm resolution before closing. A simple "Did that solve the problem?" prevents false-positive resolution rates and catches incomplete fixes.

CUSTOMER SUPPORT — 2 OF 2

3. Order Tracking Bot

SUPPORT · POST-PURCHASE

Provides real-time updates on shipping and delivery status. Handles the #1 post-purchase question ("Where is my order?") automatically, freeing agents for complex issues. Integrates with shipping APIs to pull live tracking data and handles exceptions like delays or missing tracking info.

TRIGGERS

- › Track order
- › Order status
- › Where is my order
- › Delivery update

FLOW

- › Detect order-related query
- › Request order number or email
- › Retrieve tracking data from API
- › Display delivery status with ETA
- › Offer additional help if needed

SAMPLE MESSAGES

- Opening:** "I'd be happy to help you track your order. Please share your order number or the email you used at checkout."
- Status:** "Your order #38291 is in transit. It left our warehouse on Tuesday and is arriving on Thursday by end of day."
- Delayed:** "It looks like your order is experiencing a shipping delay. The updated delivery estimate is Monday. I'm sorry for the inconvenience."
- Exception:** "Tracking data isn't available yet — this usually updates within 24 hours of shipment. Want me to notify you when it's live?"
- Escalation:** "This needs a closer look. I can connect you with our support team who has access to carrier details."

PRO TIP

"Where is my order?" is typically 25–40% of all support tickets. Automating this single intent can cut your ticket volume by a quarter overnight.

4. Live Agent Handoff

SUPPORT · ESCALATION

Transfers users smoothly to a human agent when automation cannot resolve the request. Preserves full conversation context so the user never has to repeat themselves. Detects escalation signals including explicit requests, repeated confusion, emotional frustration, and complex multi-step problems.

TRIGGERS

- › Speak to human / talk to agent
- › Repeated bot confusion (2+ loops)
- › Emotional frustration detected
- › Complex multi-step requests

FLOW

- › Detect escalation intent or trigger
- › Confirm user wants human help
- › Collect brief issue summary
- › Transfer session with full context
- › Confirm successful handoff

SAMPLE MESSAGES

- Prompt:** "It sounds like this needs a human touch. Would you like me to connect you with a live agent?"
- Collecting:** "Before I transfer you, could you briefly describe the issue so our agent can jump right in?"
- Transfer:** "Connecting you now. I've shared our conversation so you won't need to repeat yourself."
- Wait:** "Estimated wait time is about 3 minutes. You'll be connected to the next available agent."
- Offline:** "Our team is currently offline (back at 9am EST). I can take your email and have someone follow up first thing."

PRO TIP

Set a hard rule: if the bot fails to understand the user twice in a row, trigger handoff automatically. Don't wait for frustration to build — by the third loop, trust is already gone.

SALES & LEAD GENERATION — 1 OF 2

5. Pricing Page Bot

SALES · DECISION SUPPORT

Explains pricing plans and helps users choose the best option based on their team size, budget, and feature needs. Reduces bounce rates on pricing pages by answering questions in real time instead of forcing users to dig through comparison tables or wait for sales calls.

TRIGGERS

- › Pricing questions
- › Plan comparison
- › Cost inquiries
- › Feature-to-plan mapping

FLOW

- › Detect pricing interest
- › Ask clarifying questions (team size, needs)
- › Recommend best-fit plan with reasoning
- › Offer next step (trial, demo, checkout)

SAMPLE MESSAGES

- Opening:** *"Looking at our plans? I can help you find the right fit. What matters most — team size, features, or budget?"*
- Clarification:** *"How many team members will need access? This helps me narrow down the best option."*
- Recommend:** *"Based on a 5-person team needing analytics, our Pro plan at \$49/mo is the best value. It includes everything in Basic plus advanced reporting."*
- Next step:** *"Want to start a free 14-day trial? No credit card required."*

PRO TIP

Never push the most expensive plan by default. Recommend based on stated needs, then mention the upgrade path. Users trust advisors, not upsellers.

6. Lead Capture Bot

SALES · LEAD GEN

Collects contact information after meaningful engagement by offering value first. Unlike pop-up forms that demand data upfront, this bot waits for genuine interest signals, delivers something useful, and then asks for contact details — resulting in higher-quality leads.

TRIGGERS

- › Download resource / guide request
- › Product interest signal
- › Request demo or pricing info
- › Return visitor (2+ sessions)

FLOW

- › Detect engagement signal
- › Offer value (guide, checklist, template)
- › Request email after commitment
- › Deliver content instantly
- › Tag lead in CRM with context

SAMPLE MESSAGES

- Value offer:** *"We put together a free checklist that covers exactly what you're reading about. Want a copy?"*
- Request:** *"Just share your work email and I'll send it right over. No spam — just the checklist."*
- Delivery:** *"Done! Check your inbox — the checklist should arrive within 60 seconds."*
- Follow-up:** *"While you're here, anything else I can help you with?"*

PRO TIP

Offer value before asking for data. A bot that says "Want our free guide?" then asks for email converts 2-3x better than a form that leads with "Enter your email."

7. Demo Scheduling Bot

SALES · BOOKING

Automates demo booking while preserving user flexibility. Captures interest at peak intent moments (after pricing exploration, feature deep-dives, or return visits), collects availability, and confirms bookings instantly. Eliminates the back-and-forth email chains that kill conversion momentum.

TRIGGERS

- › Explicit demo request
- › Extended feature exploration (3+ pages)
- › Pricing page revisit
- › High-intent return visitor

FLOW

- › Detect demo interest signal
- › Confirm interest and collect context
- › Present available time slots
- › Confirm booking + send calendar invite
- › Send reminder 24h before demo

SAMPLE MESSAGES

- Opening:** "Would you like to see this in action? Our team can walk you through a 15-minute live demo."
- Context:** "Quick question — are you exploring this for yourself or for a team? This helps us tailor the demo."
- Slots:** "Here are available slots this week: Tuesday 2pm, Wednesday 10am, or Thursday 3pm. Which works best?"
- Confirm:** "You're booked for Wednesday at 10am EST. You'll get a calendar invite and a reminder the day before."
- Decline:** "No problem at all. Feel free to explore on your own — I'm here if you have questions later."

PRO TIP

Always offer a graceful "no thanks" path. Users who feel pressured into demos either no-show or arrive defensive. Let them come when ready.

3 Rules for Sales Bots That Convert

1. Progressive Disclosure

Collect information gradually, one question at a time. Dumping a 5-field form into a chat window defeats the purpose of conversational selling. Each question should feel natural, not like a form field.

2. Timing Beats Wording

Even the best sales copy fails when shown at the wrong moment. A demo prompt on the homepage feels pushy. The same prompt after 3 minutes on the pricing page feels helpful. Trigger by behavior, not timers.

3. Always Offer a "Browse Quietly" Option

Users should never feel trapped in a sales conversation. A simple "No thanks, I'm just looking" option builds more trust than any persuasion technique. The users who opt out now often come back later and convert.

E-COMMERCE — 1 OF 2

8. Abandoned Cart Bot

E-COMMERCE · RECOVERY

Re-engages users who leave items in their shopping cart. Detects cart inactivity, exit intent, and checkout abandonment, then sends a timely reminder with optional incentives. The key is timing: intervene before the user leaves, not after. Once they close the tab, re-engagement rates drop by 80%.

TRIGGERS

- › Cart inactivity (60+ seconds)
- › Exit intent (mouse toward close)
- › Checkout page abandonment
- › Tab switch after adding to cart

FLOW

- › Detect abandonment signal
- › Send friendly, non-pushy reminder
- › Ask if there's a blocker (shipping, sizing, price)
- › Offer help or incentive if appropriate
- › Close interaction gracefully

SAMPLE MESSAGES

- Reminder:** *"Looks like you still have items in your cart. Anything I can help with before you go?"*
- Blocker:** *"Is there something holding you back? I can help with sizing, shipping estimates, or payment options."*
- Incentive:** *"Here's 10% off your cart — just use code SAVE10 at checkout. Valid for the next 2 hours."*
- Soft close:** *"No worries! Your cart is saved. Come back anytime."*

PRO TIP

Ask about the blocker before offering a discount. Many cart abandonments are about confusion (sizing, shipping), not price. Solving the real problem converts without cutting margin.

9. Discount Offers Bot

E-COMMERCE · CONVERSION

Removes price friction at high-intent decision moments by offering targeted discounts based on real behavior signals. Unlike site-wide banners, this bot identifies specific hesitation patterns and delivers personalized offers. Critically, it suppresses repeat offers to avoid training customers to wait for discounts.

TRIGGERS

- › Repeated product page views (3+)
- › High cart value with no checkout
- › Long session with no purchase
- › Price comparison behavior

FLOW

- › Detect hesitation pattern
- › Verify user hasn't received offer before
- › Present targeted, time-limited discount
- › Suppress repeat offers for 30 days

SAMPLE MESSAGES

- Offer:** *"I noticed you've been checking out the [Product Name]. Here's a 10% discount to help you decide — valid for 24 hours."*
- High cart:** *"Your cart is looking great! Here's free shipping on orders over \$75 — you're already there."*
- Decline:** *"No problem. The offer will be here if you change your mind."*

PRO TIP

Never show the same discount twice. If a user declines, suppressing the offer for 30 days prevents "discount training" where customers learn to always wait for a deal.

10. Product Recommendations Bot

E-COMMERCE · DISCOVERY

Suggests products based on preferences and browsing behavior. Acts like a knowledgeable store associate who asks the right questions, narrows options, and presents curated picks. Particularly effective for gift purchases, comparison shoppers, and users who bounce between product pages without committing.

TRIGGERS

- › Comparison browsing (3+ products)
- › Search with no click-through
- › Gift-related queries
- › "Help me choose" messages

FLOW

- › Detect uncertainty or decision fatigue
- › Ask 2–3 preference questions
- › Recommend 2–3 curated products
- › Offer refinements or alternatives
- › Link directly to product page

SAMPLE MESSAGES

- Opening:** *"Looks like you're comparing a few options. Want me to help you narrow it down?"*
- Question 1:** *"What's the main use — daily wear, special occasion, or a gift?"*
- Question 2:** *"Any budget range in mind? I can filter for the best value."*
- Suggestion:** *"Based on your answers, here are my top 3 picks. The [Product A] is our best seller in this range."*
- Refine:** *"Not quite right? I can adjust — would you prefer something more [casual/formal/affordable]?"*

PRO TIP

Limit recommendations to 3 products max. More options increase decision fatigue. Always explain why each product was chosen — "best seller," "best value," or "closest match" builds confidence.

3 Rules for E-commerce Bots

1. Trigger by Intent Signals, Not Timers

A bot that appears after 30 seconds annoys everyone equally. A bot that appears after 3 product page views helps someone who's actually stuck. Behavior-based triggers outperform time-based triggers every time.

2. Never Interrupt Checkout

The last thing a buying customer needs is a pop-up asking "Need help?" during checkout. Once a user enters the payment flow, the bot should go silent unless the user explicitly asks for help.

3. Never Repeat a Declined Offer

If a user says "no thanks" to a discount, showing it again 2 minutes later doesn't change their mind — it changes their opinion of your brand. One offer per session, maximum.

INTERNAL & OPERATIONAL — 1 OF 2

11. HR Onboarding Bot

INTERNAL · HR

Answers common employee questions about policies, benefits, and tools during the onboarding process. New hires get instant answers to the same 20 questions every new employee asks, while HR teams save hours of repetitive work. Handles sensitive topics by routing to a real HR representative.

TRIGGERS

- › Benefits and enrollment questions
- › Company policy lookup
- › Onboarding task checklist
- › Tool access and setup help

FLOW

- › Detect HR-related query
- › Match to knowledge base article
- › Provide clear, direct answer
- › Flag sensitive topics for HR review
- › Escalate personal situations to HR rep

SAMPLE MESSAGES

- Welcome:**
Policy:
Benefits:
Setup:
Escalation:
- "Welcome to the team! I'm here to help with any onboarding questions. What do you need help with?"*
"Our PTO policy gives you 20 days per year, accrued monthly. You can start using PTO after your first 30 days."
"Health insurance enrollment opens during your first week. Here's a link to the benefits portal with plan comparisons."
"To set up Slack, check your email for an invite link. If it's not there, I can request a new one from IT."
"That's a question best handled by your HR partner directly. I'll connect you with Sarah from the People team."

PRO TIP

Build an "onboarding checklist" flow that proactively guides new hires through their first-week tasks instead of waiting for them to ask. This reduces the "What should I be doing?" anxiety.

12. IT Support Bot

INTERNAL · IT

Resolves common IT issues like password resets, access requests, and software troubleshooting. Handles the high-volume, low-complexity tickets that consume 60–70% of IT help desk time. Integrates with identity management and ticketing systems for automated resolution.

TRIGGERS

- › Login / password issues
- › Access permission errors
- › Software installation help
- › VPN or connectivity problems

FLOW

- › Detect IT issue type
- › Ask targeted diagnostic questions
- › Attempt automated fix (reset link, access grant)
- › Confirm issue resolved
- › Create ticket and escalate if unresolved

SAMPLE MESSAGES

- Opening:**
Diagnostic:
Auto-fix:
Confirm:
Escalation:
- "IT Support here. What's going on — login issue, access problem, or something else?"*
"Are you locked out completely, or is it showing an incorrect password error?"
"I've sent a password reset link to your registered email. It expires in 15 minutes."
"Were you able to log in with the new password?"
"I've created ticket #IT-4821 for this issue and assigned it to the infrastructure team. Expected response: within 2 hours."

PRO TIP

Password resets alone can account for 30–40% of IT tickets. Automating this single flow often pays for the entire bot deployment within the first month.

INTERNAL & OPERATIONAL — 2 OF 2

13. Appointment Booking Bot

INTERNAL · SCHEDULING

Books, reschedules, and cancels appointments with automatic slot management. Eliminates scheduling friction by letting users see real-time availability and confirm in seconds. Works for service businesses, healthcare, consulting, and internal meeting coordination.

TRIGGERS

- › Book appointment
- › Schedule meeting
- › Reserve time slot
- › Reschedule or cancel

FLOW

- › Detect booking request
- › Ask service type and preferences
- › Collect preferred date and time
- › Show available slots in real time
- › Confirm booking and send reminder

SAMPLE MESSAGES

- Opening:**
- "I can help you schedule an appointment. What type of service are you looking for?"
- Preference:**
- "Do you prefer morning or afternoon? And any specific day this week?"
- Slots:**
- "Here are the available times: Tuesday 10am, Wednesday 2pm, or Friday 11am. Which works for you?"
- Confirm:**
- "You're all set for Wednesday at 2pm. I'll send a confirmation email and a reminder 24 hours before."
- Reschedule:**
- "No problem. I've cancelled your Wednesday slot. Want to pick a new time?"

PRO TIP

Always send a reminder 24h before the appointment. Automated reminders reduce no-show rates by 30-50% and cost nothing to implement.

Why Internal Bots Deliver the Highest ROI

Internal chatbot templates often provide the best return with the lowest risk. Start here to build confidence and refine your automation skills before expanding to customer-facing deployments.

Predictable Patterns

Employees ask the same 20 questions. Mapping them takes days, not months.

Reliable Access

Internal systems are controlled. No third-party API surprises.

Fast Feedback

Colleagues tell you what's broken. Customers just leave.

Low Stakes

A bad answer to an employee is fixable. A bad answer to a customer is a lost sale.



Skip the scripting. Let AI build the flow.

Chatty learns your product catalog, FAQs, and brand voice. Your chatbot writes its own scripts and updates them every time your store changes.

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