

How to Buy an Employee Chatbot

in 10 simple steps

Tangowork

Chatbots for Internal Communications

Foreward

Anyone who's struggled to use SharePoint or Salesforce can agree that we need simpler internal applications for our organizations.

Chatbots represent a major simplification: they understand **normal human language**. If you know how to talk or type, you already know how to use chatbots.

For many project teams, though, chatbots are a new and unfamiliar medium. If you want to implement a chatbot, where do you start?

Like other successful projects, an employee chatbot project starts with **clearly identifying your business objectives**. Once that's done, the rest is relatively painless.

This brief, actionable ebook guides you through the 10 key steps for purchasing a chatbot platform. It's a straightforward but thorough evaluation process. I hope it helps!

Chris McGrath
Founder, Tangowork



Here are the 10 steps:

1. Assemble team
2. Determine business objectives
3. Turn objectives into user stories
4. Define business constraints
5. Research options
6. Request initial demos
7. Request free trials
8. Conduct stakeholder demos
9. Check references
10. Finalize purchase

1

Assemble team

Select a team that has the authority to

Type a message...



Assemble team

1

*"None of us is as
smart as all of us."*

– Ken Blanchard

Assemble your team

Select a team that:

- has the authority to get things done
- is committed to your business objectives
- is small enough to act with efficiency

Action: Check the box and fill out the names of the people you need on your chatbot team.

Chatbot team

- Communications Manager: _____
- HR Manager/Director: _____
- IT Director/CIO: _____
- Executive Sponsor: _____
- Project Manager: _____
- Representatives from departments impacted most: _____
- _____
- _____
- Other: _____
- _____
- _____



Determine business objectives

2

*"If you don't know where you
are going, you'll end up
someplace else."*

– Yogi Berra

Determine business objectives

Why do you need a chatbot? What problem will it solve?

Establishing clear, prioritized objectives is the most important step in deploying a successful employee chatbot. We've found that the fastest way to consensus is a group workshop.

Action: Using the following agenda as a guide, hold a half-day strategy workshop with the full team, including the ultimate decision-maker.

30 min: Frame the discussion

First, demonstrate the capabilities of chatbots. Show chatbots you use, have a consultant provide a demonstration, or watch a recorded webinar such as [“Why Chatbots are the Next Big Thing for Internal Communicators.”](#)

Second, agree on the constraints for the discussion:

- Which department is this for?
- Will the chatbot be employee-facing or customer-facing?
- What is the time horizon (we suggest 6-12 months)?

15 min: Brainstorm possibilities

Pose the question, “What will the chatbot make possible for our organization?” Have all participants write **in silence** as many ideas as they can, 1 per sticky note. As participants run out of ideas, have them post them on the wall, and encourage others to read through them.

15 min: Group the possibilities

Ask the participants to **silently** organize the sticky notes into themes. Encourage them to touch others’ sticky notes, re-group, group groups, or divide groups. Then, ask every participant to add a label to every group.

15 min: Prioritize the groups

Give each participant 7 stars to use as votes. Ask them to vote on the groups. They can distribute their 7 votes however they want. Tally up the votes, and you now have prioritized objectives.

60 min: Explore the possibilities

Break into groups of 2-3 people. For 20 minutes, each group takes one of the priorities and considers these questions:

- **CONDITIONS:** What must be true for this to happen?
- **BARRIERS:** What barriers stand in the way?
- **MITIGATIONS:** How can these barriers be removed?

Then have each group present their thoughts.

15 min: Get a blessing

Ask the ultimate decision-maker if they agree with the prioritization of objectives. Make adjustments if needed. Everyone needs to know that the ultimate decision-maker is fully on-board.

Once you've completed Step 2, congratulations! Defining and then focusing on clear business objectives is the most important step in buying, launching and maintaining a successful chatbot.

Tip: If it's not possible to be together in one room for this exercise, review the blog post "[How to Run a Remote Chatbot Strategy Workshop.](#)"

Chatbot business objectives



Turn objectives into user stories

3

"I am so clever that sometimes
I don't understand a single word
of what I am saying."

– Oscar Wilde, *The Happy Prince and Other Stories*

Turn objectives into user stories

Make your objectives easier to understand and communicate by turning them into short user stories. For each objective, ask yourself:

- Who's the user?
- What do they want?
- Why?

There may be several user stories for each objective. Here are some samples:

AS A... (WHO)	I WOULD LIKE... (WHAT)	SO THAT... (WHY)
Equipment operator	fast mobile access to standard operating procedures	I can access instructions just in time, when I'm in front of the equipment
User	photos and videos in messages	content is more interesting and easier to digest
Internal comms manager	scheduled broadcast messages	send proactive alerts and notifications to employees
IT Director	full-featured API	we can push and pull content from other systems

Action: On the next page, add at least one user story for every business objective identified in Step 2

User stories

AS A... (WHO)	I WOULD LIKE... (WHAT)	SO THAT... (WHY)

User stories (cont'd)

AS A... (WHO)	I WOULD LIKE... (WHAT)	SO THAT... (WHY)

Define business constraints

4

"Exploit the power,
of constraints"

– Donald A. Norman, *The Design of Everyday Things*

Define business constraints and limitations

Now consider your business constraints and limitations, including the chatbot delivery channel, budget, timeline, and specific IT requirements. Also consider if you have the resources to implement the chatbot yourself or if you need professional consultation and support.

Action: Fill in the business constraints that you must work within.

Chatbot delivery channel

The chatbot must work on:

- | | |
|---|---|
| <input type="checkbox"/> Cortana (voice) | <input type="checkbox"/> Slack |
| <input type="checkbox"/> Email | <input type="checkbox"/> SMS |
| <input type="checkbox"/> Facebook Messenger | <input type="checkbox"/> Web browser widget |
| <input type="checkbox"/> Microsoft teams | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Skype | _____ |
| <input type="checkbox"/> Skype for Business | _____ |

Budget

One-time cost: _____ to _____
minimum *maximum*

Recurring cost: _____ to _____ per _____
minimum *maximum*

Timeline

Chatbot launch date: _____ to _____
earliest *latest*

Required Professional Services / Consultants

- Setup and configuration
- Conversation design
- AI training
- Administrator training
- Custom coding / extensions / integrations
- Other required services:



Research options

5

"There's always,
another option."

– Richelle E. Goodrich, *Slaying Dragons*

Research options

Research the available options. There are several potential solutions. You may find it helpful to determine up front whether you will Build or Buy, as this significantly impacts the kind of research you do.

Build or Buy

How unique are your requirements? Building your own chatbot allows for complete control, but comes with a high labor cost and lengthy development time. Choosing an out-of-the-box solution allows fast deployment, frequent upgrades and ongoing maintenance and support. Which is best for you?

Action: Decide whether to Build or Buy, then research available chatbot solutions. Make a list of solutions that appear to meet your criteria, and a list of solutions that don't.

Chatbot solutions: Potential fit

These solutions address our business objectives and fit within our limitations and constraints.

	SOLUTION NAME	NOTES
✓		
✓		
✓		
✓		
✓		

Chatbot solutions: Not a fit

These solutions **do not** address our business objectives or fit within our limitations and constraints.

	SOLUTION NAME	NOTES
×		
×		
×		
×		
×		
×		
×		

Note: The balance of this workbook assumes the decision is to Buy rather than Build.

Request initial demos

6

*"Sometimes the questions
are complicated and the
answers are simple."*

– Dr. Seuss

Request initial demos with vendors who appear to meet your needs

Employee chatbot solutions are typically more complex and configurable than consumer chatbots. Therefore, the fastest way to find out whether a potential solution is a good fit is to request a live conversation and demonstration. An effective salesperson asks questions and demonstrates scenarios that will help both of you quickly determine whether there is a potential match.

Spending time with a free trial is also very beneficial, but it will be much more productive after an initial demo (see Step 7).

Action: Evaluate each vendor against the business objectives you identified in Step 2 and the constraints and limitations you defined in Step 4.

Vendor 1:

- Can address our top business objectives from Step 2
- Meets most of our requirements from Step 3 (you will evaluate this more closely in Step 7)
- Fits within our constraints and limitations from Step 4
 - Chatbot delivery channel
 - Budget
 - Timeline
 - Professional services

Notes

Vendor 2:

- Can address our top business objectives from Step 2
- Meets most of our requirements from Step 3 (you will evaluate this more closely in Step 7)
- Fits within our constraints and limitations from Step 4
 - Chatbot delivery channel
 - Budget
 - Timeline
 - Professional services

Notes

Vendor 3:

- Can address our top business objectives from Step 2
- Meets most of our requirements from Step 3 (you will evaluate this more closely in Step 7)
- Fits within our constraints and limitations from Step 4
 - Chatbot delivery channel
 - Budget
 - Timeline
 - Professional services

Notes

Request free trials

7
"The best things in life
are free. The second best
things are very, very
expensive."

– Coco Chanel

Shortlist 2-3 vendors and request free trial

Which of the vendors you met with:

- can address your top business objectives?
- meet most of your requirements?
- fit within your constraints and limitations?

Contact those vendors and request a free trial.

During the trial period, systematically test the software against the user stories you defined in Step 3. It is easy to get sidetracked by features that may be interesting but do not address your business needs. **Stay focused on your user stories.**

Action: Create a matrix based on your user stories from Step 3.

Sample evaluation matrix

AS A...	I WOULD LIKE...	SO THAT...	Vendor 1	Vendor 2
User	photos and videos in messages	content is more interesting and easier to digest	No	Yes
Internal comms manager	scheduled broadcast messages	send proactive alerts and notifications to employees	Yes	Yes
IT Director	full-featured API	we can push and pull content from other systems	Yes.	Limited.

Action: Evaluate each vendor using the matrix you create on the next page.

Conduct stakeholder demos

8

*"It ain't over
till it's over."*

– Yogi Berra

Request in-depth meeting/ demo with shortlisted vendors and your key stakeholders

This final demo serves two purposes:

- Gain full support from your key stakeholders to move forward with one of your shortlisted vendors.
- Evaluate vendor intangibles. Can they deliver? Will they be a pleasure to work with?

Use the agenda on the next page to accomplish this.

Action: Book 2-hour final demo with vendor and stakeholders. Use sample agenda on next page.

Stakeholder demo agenda

:05 Introductions

:40 Business objectives. Vendor demonstrates how software addresses your top 3 business objectives from Step 2. Allow plenty of time for Q&A after each objective.

:15 Requirements. Vendor demonstrates how software meets 3-5 of your functional requirements from Step 3 – particularly ones that were difficult to evaluate during free trial. Allow time for questions throughout.

:15 Constraints. Discuss constraints & limitations from Step 4 – especially where there could be a potential issue, such as cost, timeline, or IT infrastructure.

:15 Experience. Vendor shares screenshots and case studies from implementations where the organization or user scenarios are similar to yours. Allow time for questions throughout.

:15 Implementation. Vendor discusses how the implementation would proceed. How soon can it be delivering business value? What are they key steps? What assistance will the vendor provide?

:15 Q&A. Open questions and answers.

Check references

9

*"Time spent on hiring
is time well spent."*

– Robert Half

Pick your preferred product, check references

By now you have a preferred vendor. Just as you would when hiring an employee, an important final step is to request and check references. There are many questions you could ask the vendor’s clients, but the most revealing one is this:

- If you could do it over again, would you buy from them?

Action: Request 2-3 reference clients from vendor. Phone or email each one.

Reference 1:

Name

Title

Company

Phone/Email

If you could do it over again, would you buy from them?
Why/why not?

Reference 2:

Name

Title

Company

Phone/Email

If you could do it over again, would you buy from them?
Why/why not?

Finalize purchase

"If my business partner was possessed by a brain-eating monster from beyond spacetime tomorrow, what is the worst thing they could do to me?"

– Charles Stross

Finalize purchase

Request an official proposal or contract from the vendor. Depending on the size of your organization, your procedure for reviewing contracts and finalizing procurement will vary.

Some key points to review in the proposal:

- Aside from use of the software, what is / is not included in the price?
- What is the total year 1 cost? Year 2 cost? Year 3 cost?
- What are the payment terms?
- What happens if our company grows?
- How can we terminate the agreement? What happens?

Action: Request official proposal. Review, considering points above. Revise if necessary. Sign!

These 10 steps lead you through a straightforward but thorough evaluation and purchase process. Once you buy, the real work begins — launching and managing a mission-critical chatbot that is indispensable for your organization!



About the Author

Chris McGrath is founder of [Tangowork](#) (chatbots for internal communications) and co-founder of [ThoughtFarmer](#) (social intranet software). He loves a difficult technical problem and a well-pulled espresso. He has more children than he expected, he thinks social media is making us stupider, and if the wind is over 20 knots he stops working and goes kitesurfing.

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software & consulting to make it
easy for communications teams to
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The logo for Tangowork, featuring the word "Tangowork" in a white, stylized, cursive font with a decorative flourish under the "k".

Chatbots for Internal Communications