

Determine business objectives

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*"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 enterprise 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.](#)"

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