In -Depth AI Chatbot Framework   
Franquicia Boost

**1. System Architecture Overview**

**1. We Build AI Bot On OpenAI ChatGPT – 4.0 :** The AI-bot needs to be trained on franchise ecosystem data as per Canadian standards which – client needs to provide the information

* **WordPress Custom Post Types**: Filters will be used for industry, location, price range, and investment levels for AI Bot
* **AI Knowledge Base**: Feed the AI bot with information related to FDD , listings advantages for franchises , and FAQs – client needs to provide the information
* **Vector Database Integration**: For advanced implementations, use WP Engine's Managed Vector Database to enable semantic search across franchise content

**Suggestions for AI Bot  
Database Structure for Franchise Listings**

Franchise Table Structure:  
- franchise(id, name, brand\_description, employee\_count, franchise\_fee, initial\_investment, royalty\_percentage, franchisor\_id)  
- industry(industry\_id, industry\_name, category)  
- location(location\_id, franchise\_id, city, state, zipcode, territory\_details)  
- franchise\_industry\_mapping(franchise\_id, industry\_id)  
- advantages(advantage\_id, franchise\_id, advantage\_description)  
- requirements(requirement\_id, franchise\_id, min\_investment, liquid\_capital\_required, net\_worth\_required)

This normalized structure prevents data duplication while enabling efficient filtering.

**2. Conversational Flow Design**

**Entry Points & User Intent Recognition**

**Primary Entry Points**:

* Homepage greeting: "Find your perfect franchise opportunity"
* Industry-specific landing pages: Context-aware based on page content
* Exit intent triggers: Capture leads before they leave
* Pricing/investment pages: High-intent visitors

**Intent Classification System**:

Your chatbot router should classify user intents into:

1. **Discovery/Filtering Intent**: User wants to browse franchises by criteria as per filters provided above.
2. **Specific Franchise Inquiry**: Questions about a particular opportunity
3. **Comparison Intent**: Wants to compare multiple franchises
4. **Meeting/Contact Intent**: Ready to schedule consultation
5. **General Information**: Questions about franchising process

**Conversation Flow for Objective 1: Intelligent Filtering**

**Trigger-Action-Filter Framework**:

**Stage 1: Greeting & Intent Capture**

Bot: "Welcome! 👋 I'm here to help you find the perfect franchise opportunity.   
Are you:  
🔍 1: Exploring franchises by industry  
💰 2: Looking within a specific budget  
📍 3: Searching in a particular location  
📊 4: Comparing multiple options"

**Stage 2: Progressive Filtering (Conversational Forms)**

Instead of overwhelming users with all filters at once, we will use guided conversation:

User selects: "Exploring by industry"  
Bot: "Great! Which industry interests you most?"  
[Quick Reply Buttons: 1: Food & Beverage | 2: Retail | 3: Home Services | 4: Fitness & Health | 5: Education | 6: Other]  
  
User selects: "Food & Beverage"  
Bot: "Excellent choice! What's your investment range?"  
[Quick Reply Buttons: Under $50K | $50K-$150K | $150K-$300K | $300K+ | Not sure yet]  
  
User selects: "$50K-$150K"  
Bot: "Perfect. Where are you looking to open?"  
[Text Input: "Enter city"]

**Stage 3: Results Presentation with Rich Cards**

Display filtered results using interactive cards:

Bot: "I found 12 franchise opportunities matching your criteria! Here are the top matches:"  
  
[Carousel Card 1]  
🍕 Pizza Franchise X  
💰 Investment: $75K-$120K  
📍 Available in: Denver, CO  
⭐ Rated 4.5/5 by franchisees  
[Button: Learn More] [Button: Compare]  
  
[Carousel Card 2]  
☕ Coffee Shop Franchise Y  
💰 Investment: $95K-$145K  
📍 Available in: Denver, CO  
⭐ Rated 4.8/5 by franchisees  
[Button: Learn More] [Button: Compare]

**Stage 4: Refinement Loop**

Bot: "Would you like to:"  
- Refine these results  
- See franchises in different price ranges  
- Explore other industries  
- Learn more about a specific franchise

**Conversation Flow for Objective 2: Franchise Guidance & Meeting Scheduling**

**Lead Qualification Framework (BANT + Franchise-Specific)**:

Your AI bot should score leads based on:

**Budget (Upto 25 points)**:

* Has liquid capital: +25 points
* Has $100K+: +20 points
* Has $50K-$100K: +15 points
* Under $50K or unsure: +5 points

**Authority (20 points)**:

* Decision maker: +20 points
* Influencer role: +15 points
* Researching for someone else: +5 points

**Need (25 points)**:

* Specific industry interest: +25 points
* General exploration: +15 points
* Just browsing: +5 points

**Timeline (20 points)**:

* Ready within 3 months: +20 points
* 3-6 months: +15 points
* 6-12 months: +10 points
* Just researching: +5 points

**Engagement (10 points)**:

* Viewed multiple franchises: +5 points
* Downloaded materials: +3 points
* Returned visitor: +2 points

**Qualified Lead Threshold**: 60+ points triggers meeting scheduling flow

**Stage 1: Franchise Highlight & Education**

User: "Tell me more about Pizza Franchise X"  
  
Bot: "Great choice! Here's what makes Pizza Franchise X special:  
  
📊 Business Model Highlights:  
• Proven system with 200+ locations nationwide  
• Average unit volume: $650K annually  
• Break-even typically achieved in 18-24 months  
  
✅ Key Advantages:  
• Comprehensive 3-week training program  
• Ongoing marketing support  
• Proprietary technology platform  
• Strong brand recognition in target markets  
  
💼 Investment Breakdown:  
• Franchise Fee: $45,000  
• Initial Investment: $75K-$120K (includes equipment, inventory, working capital)  
• Royalty: 6% of gross sales  
• Marketing Fund: 2% of gross sales  
  
🎯 Ideal Candidate Profile:  
• $150K+ liquid capital  
• $300K+ net worth  
• Passion for food service  
• Strong local community ties  
  
Would you like to:"  
[Button: See Success Stories]   
[Button: View Territory Availability]  
[Button: Schedule Discovery Call]  
[Button: Compare with Similar Franchises]

**Stage 2: Qualification Questions (Conversational)**

User clicks: "Schedule Discovery Call"  
  
Bot: "Excellent! Before we schedule your call with the franchisor, I'd like to ask a few quick questions to make sure we maximize your time together. This will only take a minute! 😊"  
  
Bot: "First, have you been exploring franchise opportunities for a while, or is this fairly new?"  
[Quick Replies: Just started | Few weeks/months | Actively researching 6+ months]  
  
User: "Few weeks/months"  
  
Bot: "Perfect timing! What's your desired timeline for opening a franchise?"  
[Quick Replies: Within 3 months | 3-6 months | 6-12 months | Still exploring]  
  
User: "3-6 months"  
  
Bot: "Great, that aligns well with typical franchise onboarding. Do you have access to the liquid capital needed ($150K+) to invest in this opportunity?"  
[Quick Replies: Yes, ready now | Yes, but need to arrange | Not quite there yet]  
  
User: "Yes, ready now"  
  
Bot: "Fantastic! And are you the primary decision-maker for this investment, or will others be involved?"  
[Quick Replies: Just me | Me + partner/spouse | Family decision | Business partners]  
  
User: "Me + partner/spouse"  
  
Bot: "Wonderful! One last question: What attracted you most to Pizza Franchise X?"  
[Text Input Field]  
  
User: "Strong ROI and proven system"

**Lead Score Calculation**:

* Timeline (3-6 months): +15 points
* Liquid capital ready: +25 points
* Decision maker with partner: +18 points
* Specific attraction stated: +20 points
* **Total: 78 points → QUALIFIED**

**Stage 3: Meeting Scheduling Integration**

Bot: "Perfect! Based on what you've shared, I think you'd be a great fit for Pizza Franchise X. Let me connect you with their development team for a discovery call! 📞  
  
I can help you book a 30-minute consultation with Sana , their Franchise Development Manager. She'll walk you through:  
✓ Detailed financial projections  
✓ Available territories in your area  
✓ The complete onboarding process  
✓ Answer all your questions  
  
Would you prefer:"  
[Button: Video Call (Zoom)]  
[Button: Phone Call]  
[Button: In-Person Meeting]  
  
User selects: "Video Call"  
  
[Embedded Calendar Widget - Calendly/Google Calendar Integration]  
Bot: "Here are Sana's available times this week. Just pick what works best for you! 👇"  
  
[Calendar shows available slots]  
  
User books: Thursday 2 PM  
  
Bot: "Perfect! ✅ You're all set for Thursday, October 19th at 2:00 PM MDT.  
  
I've sent a confirmation email to your inbox with 📧 Meeting link  
  
In the meantime, would you like me to:"  
[Button: Send me more franchise options]  
[Button: Add this to my comparison list]  
[Button: Learn about financing options]  
[Button: That's all for now]

**Meeting Scheduler WordPress Integration**:

* **Plugin Options**: Setter AI ($0 - integrates Calendly/Google/Outlook), ChatSpark (appointment scheduling), or Instabot (calendar integration)[[26]](#fn26)[[24]](#fn24)[[25]](#fn25)
* **Calendar Sync**: Real-time availability from founder/franchise development team calendars[[24]](#fn24)
* **Auto-routing**: Based on franchise type, investment level, or location, route to appropriate team member
* **CRM Integration**: Send lead data to Salesforce, HubSpot, or custom CRM via API/Zapier

**Error Handling & Fallback Paths**

**Graceful Degradation**:

Bot doesn't understand query:  
"I'm having trouble with that. Can you clarify what you mean by [repeat user's words]?   
  
Or you can also:" **this has to be discussed with Sana**  
[Button: Browse by industry]  
[Button: Filter by budget]  
[Button: Talk to human]

**Context Loss Recovery**:

User returns after 10+ minutes of inactivity:  
"Welcome back! 👋 We were discussing [Pizza Franchise X]. Would you like to:  
- Continue where we left off  
- Start a new search  
- Review your saved franchises"

**Human Handoff Trigger**:

* User asks 3+ clarifying questions bot can't answer
* User explicitly requests human assistance
* Complex legal/financial questions
* Lead score >75 points and high urgency signals

**Knowledge Base Training**

**Content Sources for AI Training**:

1. **Website Content**:
   * Use sitemap scanning to index all franchise listing pages
   * Include franchise comparison pages
   * Industry overview pages
2. **Structured Q&A Database**:
   * Create CSV file with common franchise questions and answers
   * Upload via plugin interface (Lyro, AI Power support this)
   * Categories: Investment, Legal/FDD, Training, Support, Territory, ROI
3. **Franchise Disclosure Documents (FDDs)**:
   * Upload key sections as PDFs to knowledge base
   * Train bot on Item 19 (financial performance) data
   * Include territory availability information
4. **Success Stories & Testimonials**:
   * Structured data about franchisee experiences
   * ROI timelines and case studies

**Training Methods**:

**Initial Training**: Bulk upload using CSV (question-answer pairs) or scan entire website

**Option 2: Collect chat Integration**

* Install Collect chat plugin
* Build conversation flow in Collect chat dashboard
* Add appointment scheduling node with Google Calendar integration
* Embed chatbot code in WordPress site
* Configure WhatsApp handoff for urgent requests

**Option 3: Custom Implementation with Calendly API**

// Embed Calendly widget in chatbot response  
function showCalendlyWidget() {  
 Calendly.initInlineWidget({  
 url: 'https://calendly.com/franchise-development/discovery-call',  
 parentElement: document.getElementById('chatbot-calendar'),  
 prefill: {  
 name: leadData.name,  
 email: leadData.email,  
 customAnswers: {  
 a1: leadData.franchise\_interest,  
 a2: leadData.investment\_range,  
 a3: leadData.timeline  
 }  
 },  
 utm: {  
 utmSource: 'chatbot',  
 utmMedium: 'website',  
 utmCampaign: leadData.franchise\_id  
 }  
 });  
}

**5. Data Flow & Integration Architecture**

User Input (Chatbot Widget)  
 ↓  
Intent Classification (OpenAI API / NLP)  
 ↓  
 Decision Router  
 ↓  
 ┌───────┴───────┐  
 │ │  
Filtering Query Franchise Info Query  
 │ │  
WordPress REST API Knowledge Base  
 │ │  
Custom Post Types Vector Search  
 │ │  
 └───────┬───────┘  
 ↓  
 Response Formatting  
 ↓  
 Lead Scoring Engine  
 ↓  
 (If qualified: >60 points)  
 ↓  
 Meeting Scheduler API  
 (Calendly/Google Calendar)  
 ↓  
 CRM/Email Integration  
 (HubSpot/Salesforce/Zapier)  
 ↓  
 Confirmation to User + Admin Notification

**6. Performance & Analytics**

**Key Metrics to Track**

**Engagement Metrics**:

* Chatbot interaction rate (% of visitors who engage)
* Average conversation length
* Completion rate (users who reach desired outcome)
* Drop-off points in conversation flow

**Conversion Metrics**:

* Lead qualification rate
* Meeting booking rate
* Lead-to-franchisee conversion rate (with 40% faster response time expected)[[35]](#fn35)

**Operational Metrics**:

* Response time (should be <2 seconds)
* Accuracy rate (% of queries answered correctly)
* Human handoff rate
* After-hours engagement (24/7 availability benefit)

**Optimization Strategy**

* **A/B Testing**: Test different greeting messages, button labels, question sequences.
* **Conversation Analytics**: Review chat logs to identify common questions not in knowledge base.
* **User Feedback**: Post-chat survey asking if the bot was helpful.
* **Continuous Training**: Add new franchise opportunities and update knowledge base weekly. (when it will be updated on website Bot will automatically scrap)

**7. Security & Compliance Considerations**

**Data Privacy**

* **GDPR Compliance**: User consent for data collection, ability to export/delete data
* **Privacy Policy**: Clear disclosure in chatbot about data usage
* **Secure API Communication**: HTTPS for all API calls, encrypted storage of API keys
* **PII Handling**: Minimal collection, secure transmission to CRM systems

**Franchise-Specific Legal Requirements**

* **FDD Disclosure**: Bot must reference 14-day FDD review period requirement
* **No Earnings Claims**: Unless documented in Item 19, bot should not make specific income promises
* **Territory Accuracy**: Ensure location data is current and accurate
* **Disclaimer**: Include standard disclaimer about investment risks

**9. Cost Considerations ( To be bear by client)**

**Plugin/Service Costs**: Approximate value

* AI Engine: Free (OpenAI API costs ~$0.002 per conversation)
* AI Power: $9.99/month
* WPBot Pro: $39/year
* Setter AI: Free plugin (service pricing varies)
* Advanced Custom Fields Pro: $49/year (for custom post types)

**API Costs**: Approximate value ( to be bear by client )

* OpenAI API: $5-20/month for typical chatbot usage
* Calendly: Free to $16/user/month
* CRM integrations: Varies by platform