**Notes Meeting Now Finance**

*10-09-2018*

1. **Why does Now Finance want to integrate a chatbot and what does the company hope to achieve with it?**

The current search tool on the website is not the easiest and most efficient. How to make it easier? Customers are mostly not sure about the product or not sure about the documentation. One goal would be to make the application process easier. Focus on one thing first.

They are looking at multiple options.

1. CUSTOMER ACQUISITION GOAL: FROM CHAT > LEAD > APPLICATION (NEW)
2. CUSTOMER SERVICE GOAL

Another channel for marketing (chatbot could serve this purpose) (Check the chatbot from HHM insurance company, they like that one)

1. **What platforms do you plan on using the chatbot on?**

Website, Facebook. Voice based search in future. Multiple interfaces necessary.

1. **How much online web traffic are you experiencing?**

50.000 visitors over a month. 100 chats a day. 100 different people chatting each day. Most of them are triggered. They auto trigger the chat. Team of 9 for customer service.

1. **What is the budget of the company for the implementation and continuation of a chatbot?**

Not discussed in detail, but they see the project as something for the longer term and have budget available. Will include this in the consultation report

1. **Is personalization necessary?**

Yes. There is a difference between current customers and potential leads (see goals question 1

1. **What would you say is the most recurrent problem customers face so far?**

They will send us their most recurrent problems.

**Random notes**

They plan to create a portal and provide articles.

LOOK AT JETSTAR chatbot example.

65% of users use mobile client.

10% is useless calls.

FRONTEND: same colours as the website.

CONSENT for the leads. They want to implement a marketing/lead structure in the chatbot. (Not our main focus)

**They will send us scenarios which are recurring often, along with dialogues/data of chats related to these scenarios.**