**Product Update and Task Allocation**

Following the meeting me and Dave had with Now Finance (Mohamed called in as well), we now have a clear picture about what the client expects from us. The scope can now be narrowed down to two main final deliverables:

1. A functional chatbot which is able to answer questions perfectly about some of the most recurring problems customers are facing.

* 1. Now Finance will send us a list (and dialogues/data) of these problems in the coming week
  2. This means the knowledge of the chatbot regarding these problems has to be updated by both using the dialogue data they are sending us and maybe also some manual work (rephrasing questions and answers)
  3. They indicated multi-platform would be desirable, so for now getting our chatbot up and running on both the demo website and Facebook messenger will be sufficient
  4. Since we are going to showcase the website to the client, the design of the website has to look top notch and in line with industry standards (finance).

2. A consultancy report which described several aspects about the integration of a chatbot. The document is already work-in-progress, but we now have a clearer picture of what Now Finance would like to know.

* 1. Recap of the desires and goals of the chatbot for Now Finance specifically
  2. Overview of the available chatbot frameworks and companies that are already using chatbots
  3. Recommended framework (=DialogFlow) and its associated costs plus a quote from an external party
  4. Integration process of the chatbot including maintenance
  5. Concluding remarks

Team Leader: Consultancy report

Product Owner: Consultancy report and Project Scope and Diary Update

Back-end: Continue working on point 2.2 and 2.4. Further, wait for the scenarios and data to come our way and focus on deliverable number 1.

Front-end: See if you can find a WordPress template which we can apply on our website to make for a more beautiful web design to show to the company.

UI/UX: Work together with team front-end to find the perfect design.

**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.**