

## Objective

AI chat bot integrated with Chat GPT to manage a conversation with a prospect and act as a virtual sales rep / customer service for local home service companies. The companies may be providing different services, such as; landscaping services, pest and insect control, HVAC repair and maintenance, plumbing repair, and handyman and much more

We should allow our customers to train the bot with all the information in the same manner as they train a new human employee, of course we will have to provide all guidelines to our customers and explain to them what information is needed for the bot to perform its best job.

In addition to the conversation, the bot should be able to verify if the zip code provided in a service area, confirm required information for booking;

First Name:

Last Name

Phone Number

Email (optional)

Full Address

In addition the bot will need to check calendar availability (we should be able to connect via API to any calendar) and check the available slots.

Must requirements;

1. The bot should always push the consumer to schedule an appointment and ask the consumer to book the appointment unless the appointment is booked
2. The bot should not provide information that it was not asked about or provide same information multiple times
3. The bot should relay the same meaning from the text but preferably not use the same language from the provided info (unless instructed so)
4. More will come with the time

## Bot Training

Company FAQ

Services FAQ

Special / Deals offered FAQ

## Features

- Communicate with the BOT via API
  - Can be integrated with any CRM via API
- UI (<https://www.chatfast.io/>)
- Record all conversations
- Log all data usage per conversation
- Log all data usage per customer
- Chat bot for a website (<https://www.chatfast.io/>)
  - Simple chat bubble
- Analytics
  - Number of messages / contacts
  - Number of messages per contact
  - Cost per message per contact
  - Cost per contact

## Must Development requirements;

- All Data must be encrypted and hashed
  - Meaning no data in the DB or arguments when it is transferred to be transferred in plain text
  - Of course the transmission will be over HTTPs but no data is stored in the DB in plain text

# Development

\*\* I'm open to suggestions and recommendations

- Full Internal Documentation
- Full Customer Facing Documentation
- Full Architecture Diagram
- Deployed with micro services approach
  - Preferably Terraform so we could use integrate with any cloud
  - Potentially Build on kubernetes

## Phases

### Phase 1 - POC

Deploy the chat solution using all the training material so we could test to make sure it's working as expected

### Phase 2 - MVP

Deploy the solution on our architecture

### Phase 3 - Integrate with GHL (Go High Level CRM) - Live POC

Integrate the bot with the CRM via webhooks

This CRM allows to communicate with potential customer under the same user interface over multiple channels; facebook, instagram, google my business, sms and emails

Use the calendar of GHL to look for available appointments

Schedule the appointment

### Phase 4 - Build UI for our solution

- Customers should be able to sign up and integrate with their CRMs
- See data, analytics and etc

### Phase 5 - Web Chat Bot

Create UI interface (similar to <https://www.chatfast.io/>)

### Phase 6 - Create web chat capabilities like (<https://www.chatfast.io/>)

For now =)

## References

<https://www.loom.com/share/88693ddae4514722aad1dfdb49bda1c8>