**Research Report on Stakeholder Engagement Automation**

**Introduction**

The review of prominent chatbot solutions for IICTS reveals a consistent market trend: while many platforms offer entry-level features for free, especially for social media integration on Facebook and Instagram, advanced capabilities, most notably WhatsApp Business API integration, typically require a paid subscription. This pattern suggests that vendors use free social media engagement tools as an adoption strategy, drawing businesses in before monetizing through WhatsApp’s high-value, high-engagement channel.

In addition to platform pricing structures, several solutions provide tiered plans that scale with user volume, automation complexity, and third-party integrations. Free plans are generally limited in the number of monthly interactions, supported channels, or AI sophistication, meaning that organizations with higher engagement needs will likely transition to paid tiers.

Another noteworthy finding is that most of the evaluated platforms position themselves not just as chat automation tools but as comprehensive customer engagement hubs. This often includes CRM integration, analytics dashboards, lead-qualification automation, and in some cases, multilingual support to cater to diverse markets.

Overall, while there are free entry points for small-scale social media automation, the strategic design of these platforms ensures that any serious, multi-channel deployment, particularly with WhatsApp, will require a financial commitment. This makes it important for IICTS to balance initial experimentation with a free plan against the projected need for advanced features in the medium to long term.

**13 Prominent chatbot solutions:**

The following are the details of the 13 chatbots researched, from which the top three will be selected. The list below is sorted from least expensive to most expensive. The chatbots in **bold** are the top 3 proposed tools according to my research.

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| **Ref** | **Chatbot** | **Initiatives** | **Tools** | **Advantages** | **Disadvantages** |
| 1. | **HubSpot Chatbot** | CRM-integrated chatbot for questionnaires, client history tracking, and appointment scheduling. Test alongside WhatsApp. | CRM (Free tier up to 1M contacts). Skills: CRM setup, chatbot flow design. | Centralized client data. Meeting booking. Free tier available. | Advanced automation requires paid plan. Limited customization. |
| 2. | Dialogflow | NLP-powered chatbot for Yes/No and complex queries. Integrate with WhatsApp via Twilio. Store responses in Google Sheets. | Google Dialogflow (Free tier). Skills: NLP training, API integration. | Handles complex queries. Scalable and customizable. | Requires technical expertise. WhatsApp integration may add cost. |
| 3. | |  | | --- | |  |  |  | | --- | | Rasa | | Open-source chatbot for Yes/No and complex queries. Integrate with WhatsApp via API. | Python (Rasa). Skills: Coding, server setup. | |  | | --- | | Coding, server setup. |  |  | | --- | | Fully customizable. No license fees. | | Coding expertise required. Setup time is high. |
| 4. | |  | | --- | |  |  |  | | --- | | Pandorabots | | AIML-based bot for simple Yes/No questionnaires. | Pandorabots (Free/Paid). Skills: AIML scripting | Good for basic Q&A. Lightweight. | Outdated technology. Limited features. |
| 5. | |  | | --- | |  |  |  |  |  | | --- | --- | --- | | |  | | --- | |  |  |  | | --- | | **ManyChat** | | | Marketing-focused bot with WhatsApp integration for surveys and appointment reminders. | ManyChat (Free & Paid tiers). Skills: Flow setup. | Multi-platform integration. Easy campaign setup. | Risk of spam if overused. Limited NLP. |
| 6. | |  | | --- | |  |  |  | | --- | | Landbot | | Conversational forms for Yes/No data collection and scheduling. Works with WhatsApp. | Landbot.io (Free version with watermark). Skills: Visual workflow design. | Intuitive interface. Visual builder. | The free version has a watermark. Limited customization. |
| 7. | |  | | --- | |  |  |  | | --- | | Chatfuel | | No-code WhatsApp automation for Yes/No questionnaires. | Chatfuel (Limited free tier). Skills: Basic bot design. | Easy visual builder. No coding needed. | Free tier is limited. Paid features are required for scaling. |
| 8. | Tidio | |  | | --- | |  |  |  | | --- | | Live chat + AI hybrid bot for Yes/No surveys and support. | | Tidio (Free/Paid). Skills: Live chat setup. | Free plan available. Easy to use. | Limited automation. Paid plan for advanced features. |
| 9. | MobileMonkey | Omnichannel bot for WhatsApp and web. Handles bulk messaging, surveys, and scheduling. | MobileMonkey (Paid). Skills: Campaign design. | Supports many platforms. Bulk messaging. | Interface can be clunky. Paid subscription. |
| 10. | |  | | --- | |  |  |  | | --- | | **WhatsApp Business API** | | Automate client questionnaires in Yes/No format, store responses, and schedule appointments. | WhatsApp Business API (~R2000/month). Skills: Setup, flow design, integration with Google Sheets/CRM. | High adoption in SA. Multimedia support. Real-time delivery. | Requires approval and technical setup. Costs scale with usage. |
| 11. | Freshchat | Multi-channel chatbot including WhatsApp for surveys, scheduling, and support. | Freshworks (Complex pricing tiers). Skills: Multi-channel setup. | Unified inbox. Strong support features. | Pricing complexity. Some features are locked behind higher tiers. |
| 12. | IBM Watson Assistant | AI-driven chatbot for complex engagement. Can handle surveys and appointments via integration. | IBM Cloud (Paid). Skills: AI training, integration. | Enterprise-grade security. Highly customizable. | Steep learning curve. Paid subscription required. |
| 13. | |  | | --- | |  |  |  | | --- | | Zendesk Answer Bot | | Ticketing + FAQs bot for stakeholder inquiries. Not ideal for Yes/No surveys but good for support queries. | Zendesk Suite (Paid). Skills: Ticketing system setup. | Built-in analytics. Integrates with existing support tools. | Expensive for small teams. Limited WhatsApp support. |

**These are the top 3 suggested chatbots:**

1. **WhatsApp Business API**

* **Why:** Direct WhatsApp integration ensures high adoption among clients, supports Yes/No questionnaires, can store responses, and schedule appointments.
* **Best for:** Reach and real-time engagement with stakeholders.
* **Link:** <https://business.whatsapp.com/products/business-platform>
* **YouTube video explanation:** https://youtu.be/Gt0gxw6eFvI?si=6kZyj6frQcDu7svT
* **AI Overview:** The WhatsApp Business API, also known as the [WhatsApp Business Platform](https://www.google.com/search?sca_esv=827ca067cae54b45&sxsrf=AE3TifNOckHSqErb_3ulPs3bPwwxikb4CA%3A1755076394300&q=WhatsApp+Business+Platform&sa=X&ved=2ahUKEwjSv6SIuYePAxU2ZEEAHUOPDvAQxccNegQICBAB&mstk=AUtExfD8JHpoQ_-6v-k2qq7oB0flhi19vYCNe_lNfYeZmdANDtqjRVySCGBgBT442lW2SPVq3bpyuzHNZjkO6QP9HWU1Po3GC5EFgQBcKQyHG3RpfJqqqVLHADngyJM2H8CzUL3t8vslUTnK0tHVnWvklN-XLiSDs2ziQ2sPdLUpAP3l9ld3Ov8j9hHf1O7pgnInTvMGGVfwkCGwOHuHhNfP3ofkMiDpZm2yhb8RAkPr-MytNINiBMypUXeKY5Zrg-9AYYKaiBEW2JHvM5-dqaPs52n2&csui=3), is a tool that allows medium to large-sized businesses to communicate with customers on WhatsApp at scale. Unlike the standard WhatsApp Business app, the API provides access through a programming interface, enabling businesses to integrate with their existing systems like [CRMs](https://www.google.com/search?sca_esv=827ca067cae54b45&sxsrf=AE3TifNOckHSqErb_3ulPs3bPwwxikb4CA%3A1755076394300&q=CRMs&sa=X&ved=2ahUKEwjSv6SIuYePAxU2ZEEAHUOPDvAQxccNegQICRAB&mstk=AUtExfD8JHpoQ_-6v-k2qq7oB0flhi19vYCNe_lNfYeZmdANDtqjRVySCGBgBT442lW2SPVq3bpyuzHNZjkO6QP9HWU1Po3GC5EFgQBcKQyHG3RpfJqqqVLHADngyJM2H8CzUL3t8vslUTnK0tHVnWvklN-XLiSDs2ziQ2sPdLUpAP3l9ld3Ov8j9hHf1O7pgnInTvMGGVfwkCGwOHuHhNfP3ofkMiDpZm2yhb8RAkPr-MytNINiBMypUXeKY5Zrg-9AYYKaiBEW2JHvM5-dqaPs52n2&csui=3) and [e-commerce platforms](https://www.google.com/search?sca_esv=827ca067cae54b45&sxsrf=AE3TifNOckHSqErb_3ulPs3bPwwxikb4CA%3A1755076394300&q=e-commerce+platforms&sa=X&ved=2ahUKEwjSv6SIuYePAxU2ZEEAHUOPDvAQxccNegQICRAC&mstk=AUtExfD8JHpoQ_-6v-k2qq7oB0flhi19vYCNe_lNfYeZmdANDtqjRVySCGBgBT442lW2SPVq3bpyuzHNZjkO6QP9HWU1Po3GC5EFgQBcKQyHG3RpfJqqqVLHADngyJM2H8CzUL3t8vslUTnK0tHVnWvklN-XLiSDs2ziQ2sPdLUpAP3l9ld3Ov8j9hHf1O7pgnInTvMGGVfwkCGwOHuHhNfP3ofkMiDpZm2yhb8RAkPr-MytNINiBMypUXeKY5Zrg-9AYYKaiBEW2JHvM5-dqaPs52n2&csui=3). This allows for advanced features such as automated messaging, personalized campaigns, and seamless customer service interactions.

**2. HubSpot Chatbot**

* **Why:** CRM-integrated, can track client history, manage follow-ups, and schedule meetings. The free tier allows piloting without immediate cost.
* **Best for:** Managing client interactions and maintaining centralized records.
* **Link:** <https://www.hubspot.com/products/crm/chatbot-builder>
* **YouTube video explanation:** https://youtu.be/hsxD\_x2bLH8?si=pwuTpw\_OnuS2PlvI
* **Overview:** HubSpot's free chatbot builder allows businesses to automate customer interactions, qualify leads, book meetings, and provide support. It's integrated with HubSpot's CRM, ensuring seamless data synchronization.

**3. ManyChat**

* **Why:** Offers WhatsApp integration (also works on Facebook and Instagram), easy to set up, supports Yes/No questionnaires, and can manage reminders and simple appointments.
* **Best for:** Multi-channel engagement with minimal technical setup and quick deployment.
* **Link:** <https://manychat.com/>
* **YouTube video explanation:** https://youtu.be/DyhQrPQKzs4?si=C13drRY3ySvQRNRX
* **Overview:** ManyChat is a chatbot platform that supports automation across various channels, including WhatsApp, Facebook Messenger, Instagram, and SMS. It's designed for marketers and businesses aiming to engage customers interactively.

The research into chatbot solutions for IICTS shows that while many platforms offer free features for Facebook and Instagram, advanced capabilities, especially WhatsApp integration, typically require a paid plan. Among the 13 options reviewed, **WhatsApp Business API, HubSpot Chatbot, and ManyChat** stand out as the most suitable, offering ease of use and functionality for automating questionnaires, storing responses, and managing appointments. Implementing one or a combination of these solutions will enable IICTS to streamline stakeholder engagement, improve response rates, and reduce manual effort.

**Key Terms / Keywords:**

* **Chatbot:** A software application that simulates conversation with users via text or voice.
* **WhatsApp Business API:** Official platform for businesses to automate and scale WhatsApp messaging.
* **HubSpot Chatbot:** CRM-integrated chatbot for automating client interactions and follow-ups.
* **ManyChat:** Multi-channel chatbot platform for WhatsApp, Facebook, Instagram, and SMS.
* **CRM (Customer Relationship Management):** System to store and manage customer interactions and data.
* **NLP (Natural Language Processing):** AI technology that enables chatbots to understand and respond to human language.
* **Lead-Qualification Automation:** Automated process of identifying which customers are most likely to engage or convert.
* **Multi-Channel Deployment:** Using a chatbot across multiple platforms (e.g., WhatsApp, Facebook, website) simultaneously.
* **Analytics Dashboard:** Tool to track chatbot performance and engagement metrics.
* **Tiered Plans:** Subscription levels offering different features and capacities, often free, basic, or paid.
* **Engagement Hub:** A platform that centralizes multiple customer interaction channels, including chat, email, and social media.