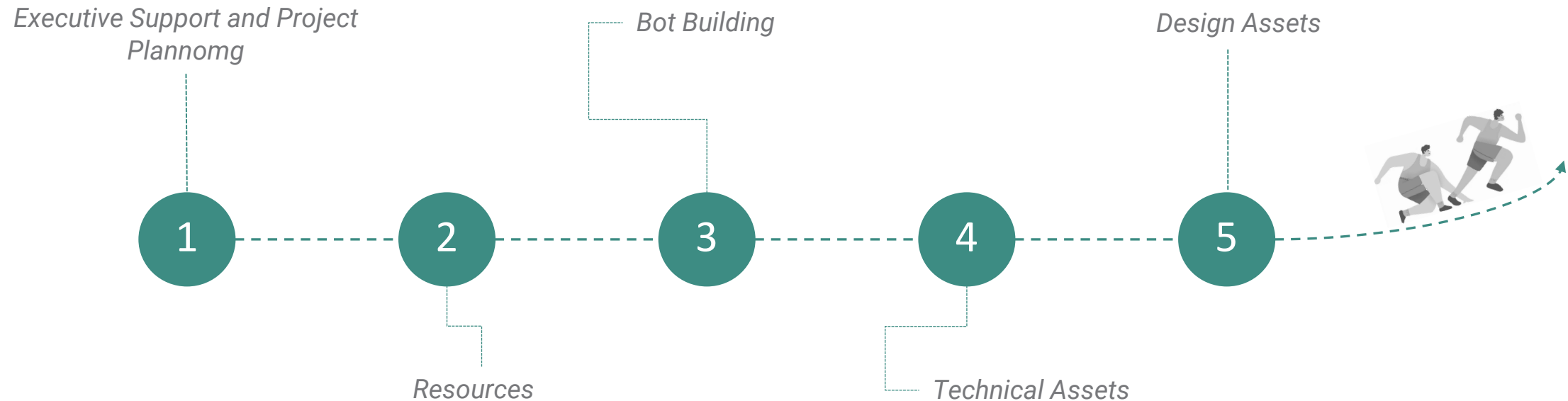# tunl.chat™

Packing for your Chatbot Journey

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Packing for your Chatbot Journey

We want your implementation of tunl.chat to be as fast possible. We have created this Packing List to help get your team prepared for the project and your kick-off meeting.

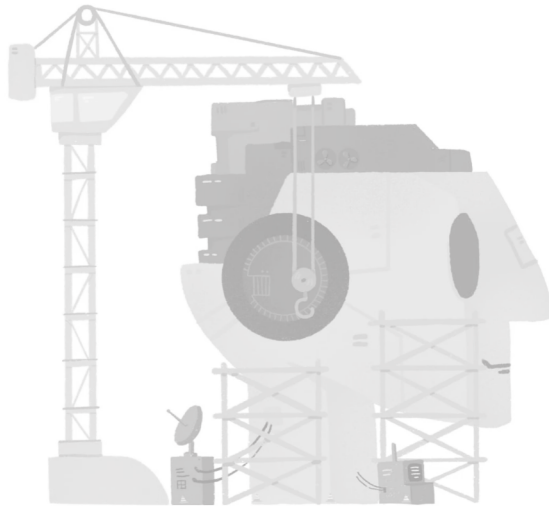***Our goal? To get your chatbot live within three months of project kick-off.***

Executive Support and Project Plannomg

Bot Building

Design Assets

1 **2** **3** **4** **5**

Resources

Technical Assets

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Executive Sponsor and Chatbot Objective Identification

1 Identify your *Project Sponsor and Executive Sponsor.*

Why?
To successfully kick off your project, you will need to engage the right resources. Your *Project Sponsor and Executive Sponsor* should start educating team members on the tunl. project and the work completed to date. They also should be an advocate for getting tunl.chat into your project pipeline.

2 Create your *chatbot's objective with measurable targets.*

You may have already completed the Objectives Template, with FICANEX and it has been stored accordingly

Why?
By identifying the purpose of your chatbot and setting measurable targets, your team will be able to evaluate its performance after go-live. It also helps your project team understand the scope of content they should be building

3 Provide current state volumes.

Why?
Part of the evaluation process in measuring the return that is being generated from your chatbot. We have built a tool that can be used internally to measure your chatbot's success.

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Resources

Let's chat about **resources!** As you build your team for the tunl.chat project, consider these qualities and skills.

Role	Objective	Qualities and Skills	
Bot Manager	Participate in the editing and creation of content for the bot. This individual will continue to maintain the bot after go-live.	• Empathetic • Analytical • Detail-oriented	• Customer service experience • Product expert • Strong communicator
Integration and Development	Complete necessary development and integration into tunl. Execution of financial message testing, UAT and PAT. May participate in the deployment of the chatbot on digital channels.	• Knowledge of banking system • An understanding of the external service providers and internal resources you rely on for technical implementations	
Project Sponsor and Project Manager	Provides project and strategy oversight. Manages client's internal resources to complete client onboarding tasks.	• Advocate for the product • Can facilitate collaboration within your organization • Great reporting and escalation skills • Decision-maker • Strong delegator	
Marketing	Provide all necessary brand direction and collateral. Plan and execute the introduction of your chatbot to your customers.	• Knowledge of all of your communication channels • Passionate about your brand's personality and voice • Thinks outside the box • Knowledge of your current marketing plan	
Operations	Educates internal teams on the chatbot use case and integrates the chat bot into current member support processes. Acts as the corporate trainer.	• Knowledge in best practices for training and support internal staff • Strong communicator • Advocate for change • Efficiency junkie	

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Key Project Dependencies and Schedules

(4) **Key Project Dependencies**

Does your financial institution have any ***key dependencies*** for the tunl.chat project? If so, please indicate the dependency.
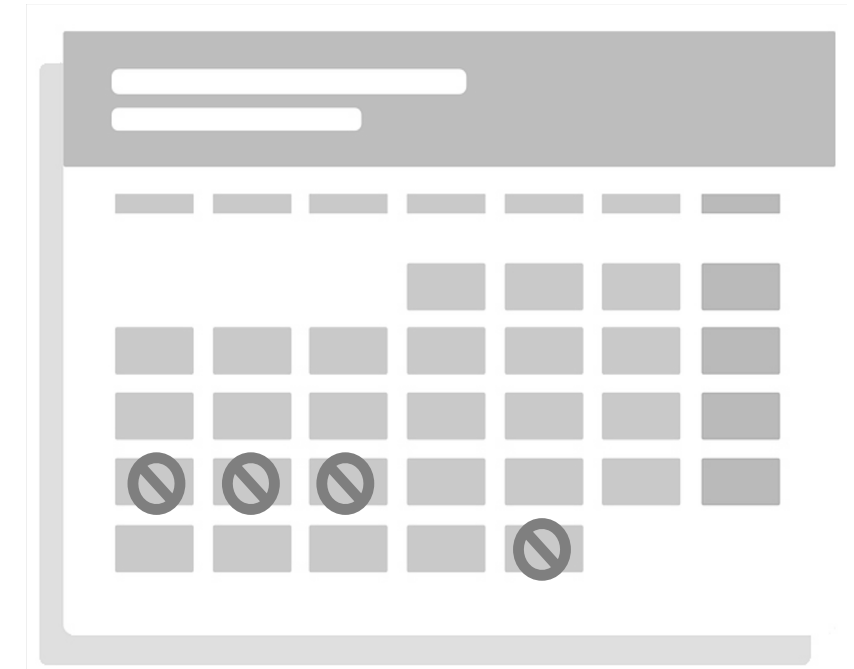***Why?***
Full transparency between FICANEX, Ada and your financial institution will ensure that risks are mitigated, and project plans and timelines remain up-to-date and accurate.

(5) **Scheduled Vacations and Restrictions**

Are there any ***scheduled vacations*** for the resources who will contributing to the tunl.chat project? Do any of your resources have **competing priorities**? Do you have an blackout periods (including vendors) for development?

Why?
We want to ensure we have insight to resource constraints, as this element greatly contributes to an accurate project plan.
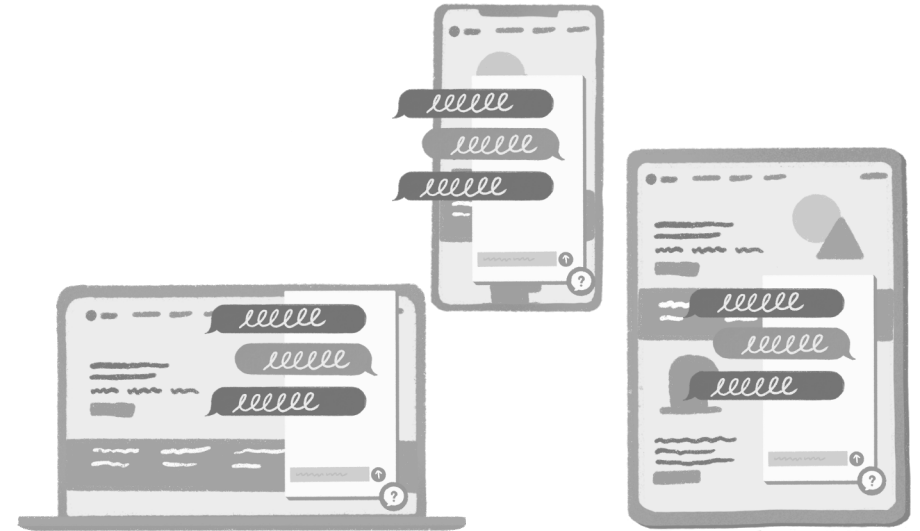
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Bot Building

If there was any item that we recommend you pack, it is this!

We want to lighten your load. One of the easiest ways that we can help is creating a foundation for the 25 Standard Flows that will be featured in your chatbot. **What is a flow?** A conversation with your member on a specific topic they have a question on.

6 What we recommend you provide:
- Top support and product questions seen in your support centres today
- Support email templates
- Call center training guides
- What languages do you would want to support
- Mortgage terms and rates

Why?
Your content assets will assist FICANEX and Ada *in developing the foundation of your chatbot*, instead of starting from scratch, there will information ready for you to update and edit once your tunl.chat project begins.
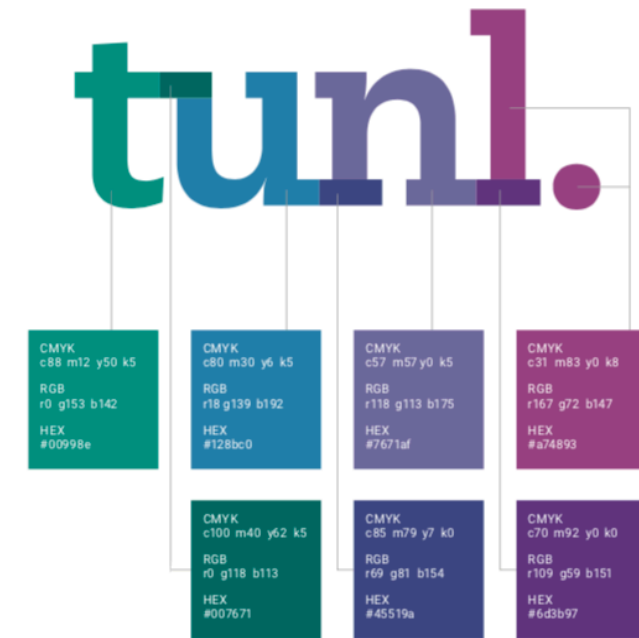
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Design Assets

7 We recommend getting a head-start on pulling together your design assets, and please, **provide us as much detail as you have!**

- Branding or Graphic Standard Guide
- Style Guide
- Logos
- HEX colours
- Description of your brand personality
- Picture assets
- How do you feel about emojis being used in the chatbot?
- How do you feel about GIFs being used in the chatbot?
- Examples of your brand being used digitally

Why?
Your design assets will be used to ensure ***language, image and tone match your current brand strategy.*** We want to make sure your member experience is fluid across all channels, including within your chatbot.

COLOURS

| CMYK c88 m12 y50 k5 RGB r0 g153 b142 HEX #00998e | CMYK c80 m30 y6 k5 RGB r18 g139 b192 HEX #128bc0 | CMYK c57 m57 y0 k5 RGB r118 g113 b175 HEX #7671af | CMYK c31 m83 y0 k8 RGB r167 g72 b147 HEX #a74893 |
| CMYK c100 m40 y62 k5 RGB r0 g118 b113 HEX #007671 | CMYK c85 m79 y7 k0 RGB r69 g81 b154 HEX #45519a | CMYK c70 m92 y0 k0 RGB r109 g59 b151 HEX #6d3b97 | |

Example graphic standards

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Technical Assets

Now we are ready to get technical. These items will help the project team understand your requirements and kick-start integration.

8 **API Documentation**
Do you have product data available through an API? We may be able to leverage it!
- List of your available APIs
- List of your available metadata and format

9 **Bot Channels and Locations**
- Where will your chatbot be deployed?
- Are there specific pages on the website where your bot will reside?

10 **Service Providers**
Understanding your environment and your valued partners will ensure we are prepared for kick-off.
- Do you have third-party service providers within your environment?
- How do they support your environment?

11 **Data Quality**
In order to maintain the highest level of security, we use cardholder data for authentication.
- What percentage of your member base do you have mobile phone numbers and email addresses for?
- Do you run campaigns to update this information?

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Let's Get Started!

Thank you for reviewing the **Packing for Your Chatbot Journey Deck!**

We know that you have lots on the go, and you may not have the time to collect all of the information we have asked for. That is okay! When you fill out the **Packing List Spreadsheet** you will notice that we have assigned a priority level for each item.

If you require clarification or have questions, please contact:
- Megan Brab (Megan.Brab@Ficanex.ca)

Happy Packing!