**CLIENT MEETING- REPORT**

**Team:SolveMate**

**Team Members:**

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**Meeting 1:**

1. **What is the main purpose of the customer service chatbot?**
   * The chatbot aims to provide 24/7 customer support by answering common queries and resolving issues quickly.
2. **Who is the target audience for the chatbot?**
   * Our target users are customers who visit the company website, primarily looking for support on orders, product queries, and troubleshooting.
3. **What types of customer issues will the chatbot address?**
   * The chatbot will handle order status inquiries, returns, product information, account management, and basic troubleshooting.
4. **What channels should the chatbot be deployed on (e.g., website, mobile app)?**
   * We want the chatbot on the company website and mobile app, with potential integration into Facebook Messenger and WhatsApp later.
5. **Do you want the chatbot to escalate issues to a human agent? If yes, under what circumstances?**
   * Yes, the bot should escalate when it cannot resolve an issue after 3 failed attempts or when a user specifically requests human support.
6. **Will the chatbot need to support multiple languages?**
   * Initially, we want English support, but in the future, we plan to add support for Spanish and French.
7. **Do you have existing customer service data that the chatbot can learn from?**
   * Yes, we have a collection of FAQs and support logs from our website and call center.
8. **What personality or tone should the chatbot convey?**
   * The chatbot should be professional, polite, and friendly, reflecting our brand's customer-first approach.
9. **How should the chatbot handle sensitive information such as payment details?**
   * The chatbot should not handle sensitive information. For payment queries, it should direct customers to the secure payment portal.

10. **How would you like the chatbot to handle negative feedback or customer complaints?**

* The chatbot should acknowledge the negative feedback politely, apologize for any inconvenience, and offer options to escalate the issue to a human representative or provide relevant solutions immediately**.**

Two women posing for a picture

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**Meeting 2:**

1. **What type of chatbot do you prefer: rule-based or AI-driven?**
   * We prefer an AI-driven chatbot to better understand natural language and improve over time.
2. **How would you like the chatbot to respond if it doesn’t understand a query?**
   * It should ask for clarification and provide a few related suggestions from our FAQ or escalate to a human agent if needed.
3. **What external systems or databases should the chatbot integrate with (e.g., CRM, order system)?**
   * It should integrate with our CRM and order management system to pull in real-time order statuses and customer information.
4. **Should the chatbot support multimedia responses (e.g., images, videos, links)?**
   * Yes, the bot should be able to send links to support articles, images for troubleshooting, and videos for tutorials.
5. **What are the expected response times for the chatbot?**
   * Responses should be instant (within 1-2 seconds) to ensure a smooth user experience.
6. **Should the chatbot track customer interactions and generate reports?**
   * Yes, we want a reporting feature that tracks the types of queries, resolution rates, and customer satisfaction for analysis.
7. **Are there any legal or compliance requirements the chatbot must adhere to?**
   * Yes, the chatbot must comply with GDPR and ensure no customer data is stored without consent.
8. **Will the chatbot require training on specific terminologies or phrases related to your business?**
   * Yes, it will need to be trained on product names, order terms, and our specific industry-related jargon.
9. **How often should the chatbot be updated or retrained to improve its performance?**
   * We want it to be retrained monthly using new data from the support team and customer queries.
10. **How will the chatbot handle follow-up questions from users?**
    * The bot should maintain context for follow-up questions during the conversation and handle them seamlessly.

A person and person looking at each other

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**Meeting 3:**

1. **What design and branding guidelines should the chatbot follow?**
   * The chatbot should follow our brand guidelines, including our color palette, fonts, and logo.
2. **Do you want the chatbot to greet users or wait for them to initiate the conversation?**
   * We want the chatbot to greet users with a welcome message, offering assistance proactively.
3. **Should the chatbot include pre-set buttons for common queries, or be entirely text-based?**
   * It should include pre-set buttons for common queries, but also allow users to type in custom questions.
4. **How many steps or questions should the chatbot use to resolve an issue?**
   * Ideally, the chatbot should resolve most issues in 3-5 steps, keeping the conversation as concise as possible.
5. **Do you want to include a satisfaction survey after each conversation?**
   * Yes, we want to add a simple 5-star rating system at the end of each interaction.
6. **What kind of onboarding experience do you envision for first-time users?**
   * A brief introduction explaining the bot’s capabilities and how it can help, followed by a short demo.
7. **Should the chatbot offer an option to switch to a different language?**
   * Yes, when we implement multilingual support, there should be a language selection option at the start.
8. **Do you want the chatbot to remember previous interactions with returning users?**
   * Yes, if the user is logged into their account, it should remember previous issues and follow up if needed.
9. **Will the chatbot support personalization based on customer data (e.g., using their name)?**
   * Yes, it should greet customers by their name and offer personalized responses based on their order history.
10. **How do you want to handle the chatbot’s accessibility for users with disabilities?**
    * It must be compliant with accessibility standards, supporting screen readers and offering text alternatives for visual elements.

A couple of women talking

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**Meeting 4:**

1. **What is the expected timeline for the chatbot’s deployment?**
   * We aim to have the chatbot live in three months, with a beta version ready in two months for testing.
2. **How do you plan to beta-test the chatbot?**
   * We’ll do internal testing with the support team, followed by a limited release to a subset of users for real-world feedback.
3. **What fallback plan is there if the chatbot malfunctions or is unavailable?**
   * If the bot goes offline or faces issues, users should be redirected to our help center or live chat support with human agents.
4. **What is your plan for continuous monitoring after deployment?**
   * We’ll set up automated monitoring tools and have a support team member assigned to review the chatbot’s performance daily.
5. **How will feedback from beta-testing be incorporated into the final product?**
   * Feedback will be categorized based on priority, and high-priority issues or feature requests will be addressed before the official launch.
6. **Do you need specific user data for testing the chatbot?**
   * Yes, we’ll provide anonymized customer data, including common queries, to ensure the bot performs well in real-world conditions.
7. **How will you handle customer feedback after launch?**
   * We’ll monitor feedback through the chatbot’s satisfaction survey and email reports, adjusting the bot’s responses as necessary.
8. **What resources do you have for handling a large volume of conversations?**
   * We’ll start with moderate expectations but are prepared to increase server capacity if demand spikes post-launch.
9. **How will you train your staff to use and manage the chatbot?**
   * We’ll provide training sessions for the support team on how to monitor, interact with, and escalate issues from the bot.
10. **What is the long-term plan for the chatbot’s improvement post-launch?**
    * Continuous improvement through customer feedback, monthly retraining, and gradual feature expansion like multilingual support and new integrations.

A person and person standing outside

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