Chatbot Readiness Checklist

A checklist for nonprofits and small to medium-sized businesses (SMBs) to review before they decide to get a chatbot for their organizations.

1. Purpose & Need
☐ Do we have a clear reason for using a chatbot, not just to follow trends?
☐ Can it improve how we serve people or handle repeated questions?
☐ Are we solving a real issue, not just hiding an internal problem?

2. System Readiness
☐ Can the chatbot access up-to-date info like forms, program data, or CRM?
☐ Do we have the permissions and tools needed to connect everything?
☐ Are our systems clean, current, and organized enough for automation?

3. Content Quality
☐ Do we have clear, updated answers or info for the bot to use?
☐ Is the content written in kind, plain language?
☐ Will our users understand and trust what the bot says?

4. Failure Planning
☐ Can users reach a real person when the bot can't help?
☐ Is there a plan for staff to step in and handle issues?
☐ Will we track errors or confusion to improve over time?

5. Ownership & Maintenance
☐ Who will keep the chatbot's info accurate as things change?
☐ Who's responsible for monitoring if it's working or needs updates?
☐ Do we know which team owns the chatbot (IT, ops, or communications)?
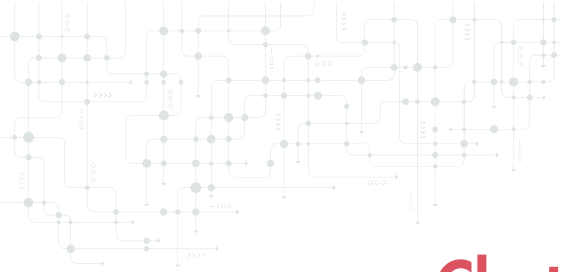
Chatbot Readiness Checklist

6. Defining Success

☐ Do we know how to measure success (like fewer emails or faster help)?
☐ Do we plan to regularly check and improve the chatbot?
☐ Will we shut it down if it's not helping?

7. Testing & Feedback

☐ Will we run a small test before a full launch?
☐ Can we gather feedback from real users?
☐ Will we make changes based on what we learn?

8. Access & Privacy

☐ Will the chatbot work for people with disabilities or different language needs?
☐ Does it protect user data and follow privacy rules?

9. Ethics & Human Impact

☐ Is this tool meant to support staff, not replace people doing valuable work?
☐ Are we using it in a way that builds trust instead of weakening it?
☐ Do we have someone responsible for its ethical use?

How to Score

Give yourself 1 point for every box you check. Then total your score:

21–27: You're likely ready to explore a chatbot. Test it first, measure well, and stay thoughtful.

14–20: You've made progress, but there are real gaps to fix before launching.

0–13: Pause. Focus on fixing operations and systems first. A chatbot now will cause more harm than help.

Next Step: Under 20? Stop before you spend another dollar on a chatbot. Book an Ops Strategy Session and fix the foundation first.