

# Chatbot design checklist

When designing, building, or reviewing a chatbot, it is essential to keep this checklist in mind. These are best practice recommendations intended to guide your efforts towards creating an effective, accessible, and user-friendly chatbot. While they provide a robust framework, they are not a definitive guide and should be adapted to meet the specific needs of your users and project.

## User centred design

	Task	Example
	Is the chatbot designed based on user needs and behaviours?	Conduct user research to understand common queries and design the chatbot to address these effectively
	Does the chatbot provide intuitive and clear interactions that minimise confusion?	Use simple language and provide clear instructions for users to follow.
	Can users navigate conversations easily and correct errors?	Provide navigational elements or text prompts to move around the conversation such as a back button or 'restart'

## Accessibility and inclusivity

	Task	Example
	Does the chatbot follow <a href="#">WCAG 2.2 AA</a> standards for accessibility?	Ensure all text has sufficient contrast against the background and provide alternative text for images. Can the user zoom the interface? Do automated accessibility scans show 0 results?
	Are chatbot responses structured for clarity and readability?	Use short sentences and bullet points to make information easy to read. Avoid acronyms, jargon, and idiomatic language
	Does the chatbot support screen readers, keyboard navigation, and voice input?	Test the chatbot with assistive tools like JAW or dragon to ensure compatibility. Have users of assistive tools and alternative input methods tested the product?
	Is high-contrast text used, and does the chatbot avoid reliance on colour alone for meaning?	Add non-visual cues to complement a change of colour, such as bold text or well recognised iconography, to convey important information.
	Does the chatbot offer clear prompts, summaries and undo options to help users stay oriented?	Allow user to click back into a previous conversation point to ask the question in a different way
	Does the chatbot offer alternative navigation methods e.g. menus or buttons instead of relying on text input?	For questions with common responses, consider providing buttons that allow users to enter those options with reduced cognitive load.
	Are context aware suggestions supplied if a response isn't understood rather than just saying, 'I don't understand'?	Minimise the number of situations that result in a generic failure response. For any situations that remain, provide users with the ability to try again, or signpost them to other contact methods.

	Are session timeouts supportive of those who require additional time to process responses?	Ensure that users are given time to extend session timeouts or otherwise made aware of future timeouts before they occur.
	Can users pause, change window, save and return to the chat without losing progress?	If users are logged in, associate the chatbot conversation with the users account rather than with the browser session.
	Does the chatbot provide audio responses, visual indicators, and haptic feedback to accommodate different disabilities?	If on mobile, provide haptic feedback each time a response is generated

## Transparency and ethics

	Task	Example
	Does the chatbot clearly indicate when it is being used?	Start the conversation with a message like "Hello, how can I help today."
	Are chatbot limitations transparent, and is there a way to escalate to a human?	"If I can't help, I'll connect you with a member of our team"
	Are biases in responses avoided, and is inclusivity ensured in content?	Regularly review responses to ensure they are free from biased or discriminatory language.

## Consistency

	Task	Example
	Is a standardised tone of voice used, aligned with University communication policies? Potential to use different tone of voice depending on the audience	Use a friendly and professional tone in all responses.
	Is chatbot behaviour consistent across different platforms (e.g., website, mobile app)?	Ensure the chatbot provides the same responses whether accessed via the website or mobile app.

## Conversation design standards

	Task	Example
	Is simple and concise language used to ensure clarity?	Use phrases like "How can I help" instead of "Please let me know how I may assist you with your enquiries today."
	Are suggested responses or buttons provided where applicable to guide users?	Provide buttons like "Yes" and "No" for closed questions.
	Are multiple ways to ask common queries offered (e.g., variations of "How do I apply?")?	Recognise both "How do I apply?" and "What is the application process?"
	Can users rephrase or refine their queries without restarting the conversation?	Allow users to clarify their questions without losing the context of the conversation.

## User testing and feedback

	Task	Example
	Are chatbots regularly tested for functionality, UX, and accessibility compliance?	Conduct usability testing with diverse user groups to identify and fix issues and make future improvements
	Are periodic reviews conducted to update chatbot knowledge bases and check validity?	Schedule regular updates to ensure the chatbot's information is current and factually correct.
	Is there a way for users to report issues and suggest improvements?	Include a feedback option like "Was this helpful? Yes/No" at the end of conversations.