

# Your First AI Chatbot: Simple, Practical, Powerful

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Claudia Chan, Manager of Digital Strategy and Technology, MIABC  
Daphne Thomson, AI Consultant, Catch the Beat Digital Marketing

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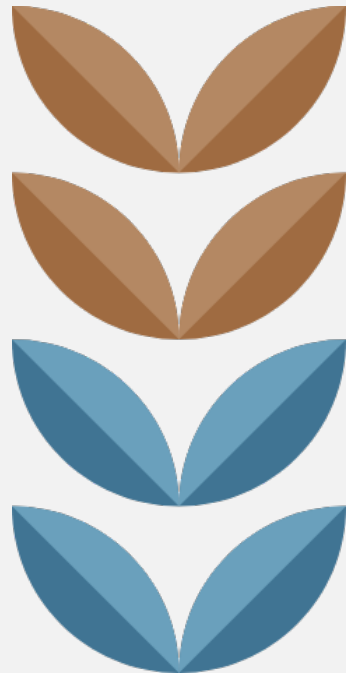
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COLUMBIA**

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# Introduction

# What We'll cover

- Understanding Chatbots/Agents
- Planning & Preparation
- Design & Development
- Deployment & Maintenance
- Insights & Key Takeaways
- Create your own chatbot/agent live





# Understanding Chatbots/Agents



# What is a Chatbot/Agent?

## AI-Powered Conversation

- Simulates human conversations
- Uses AI to provide automated responses
- Delivers information quickly and efficiently

## What Can We Use It For?

- Support member services
- Assist with knowledge management
- Streamline staff onboarding
- Provide internal policy & process support

# Example – Branding Review Agent

## ▲ A Fun and Wild Journey Through Baby Shark: Song, Lyrics, and Cute Imagery



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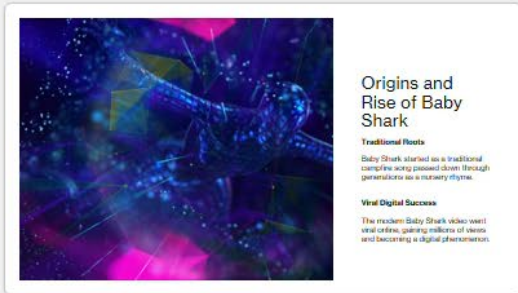
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## ▲ Introduction to the Baby Shark Phenomenon



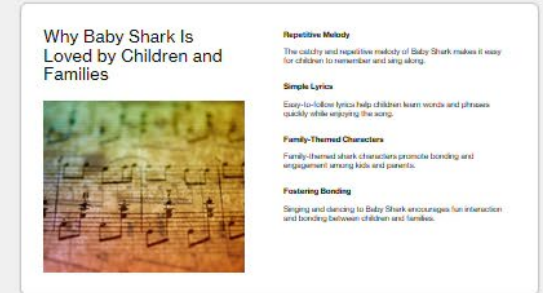
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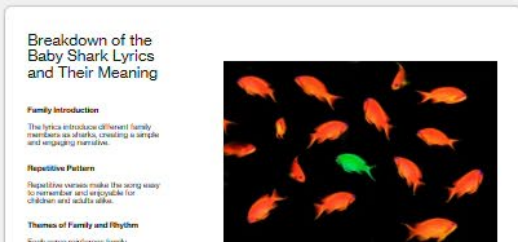
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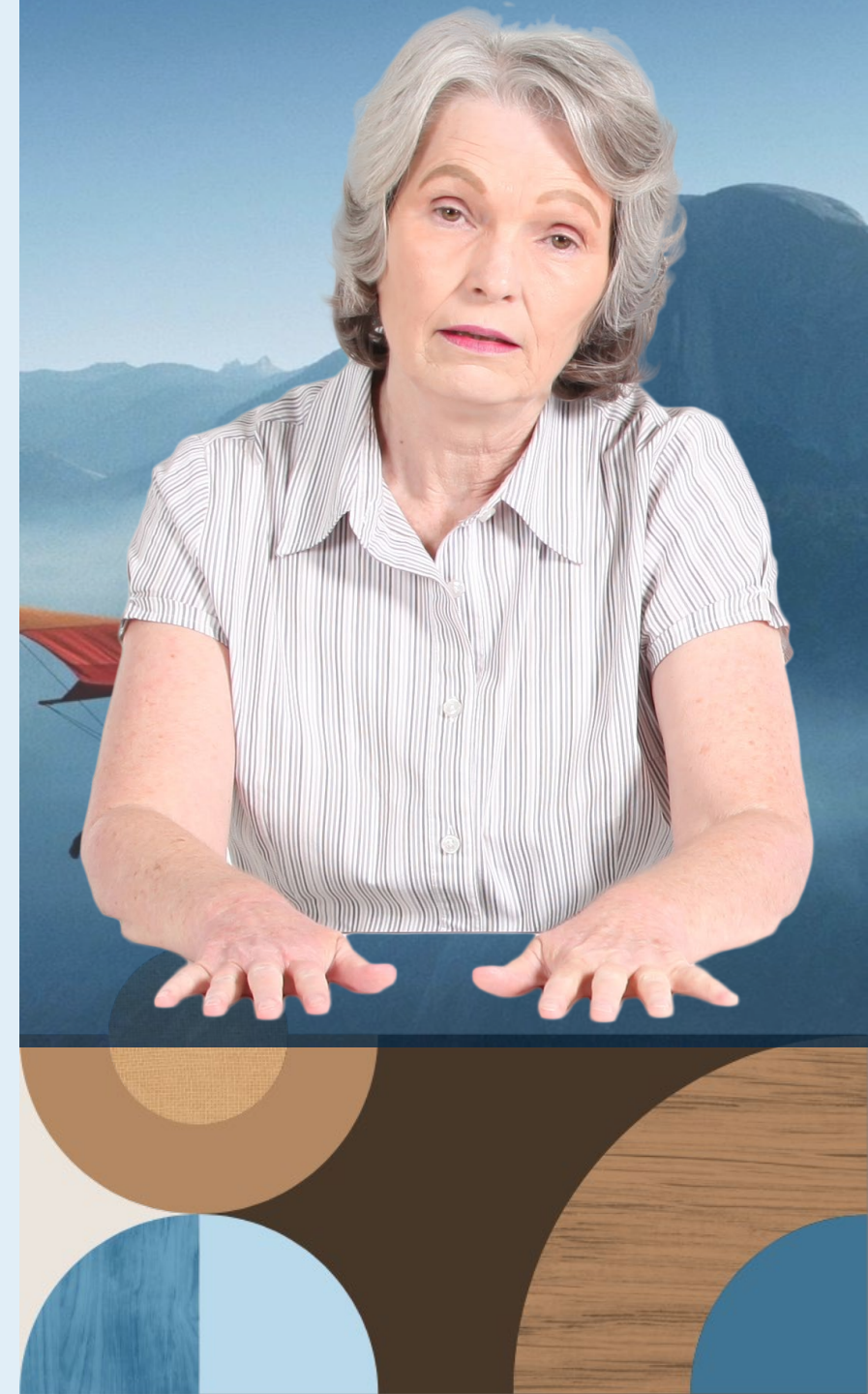


## ▲ Exploring the Baby Shark Song and Its Catchy Lyrics



# Misconceptions About Chatbots

- Chatbot is always correct
- Chatbot is difficult to master
- Chatbot will take my job

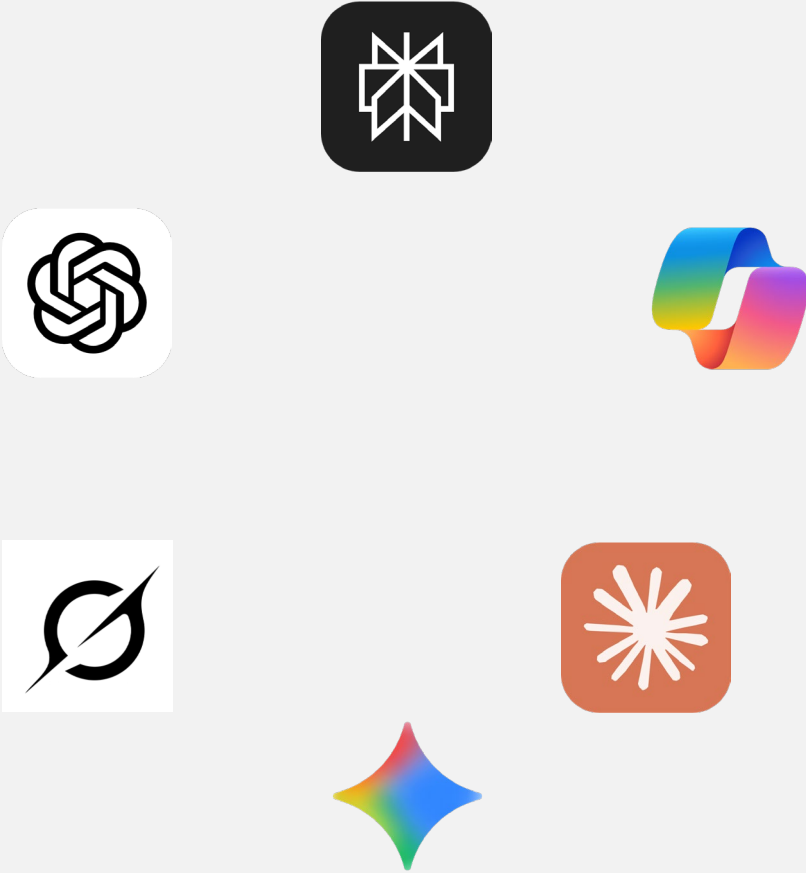


# The CoPilot and Sister-wives



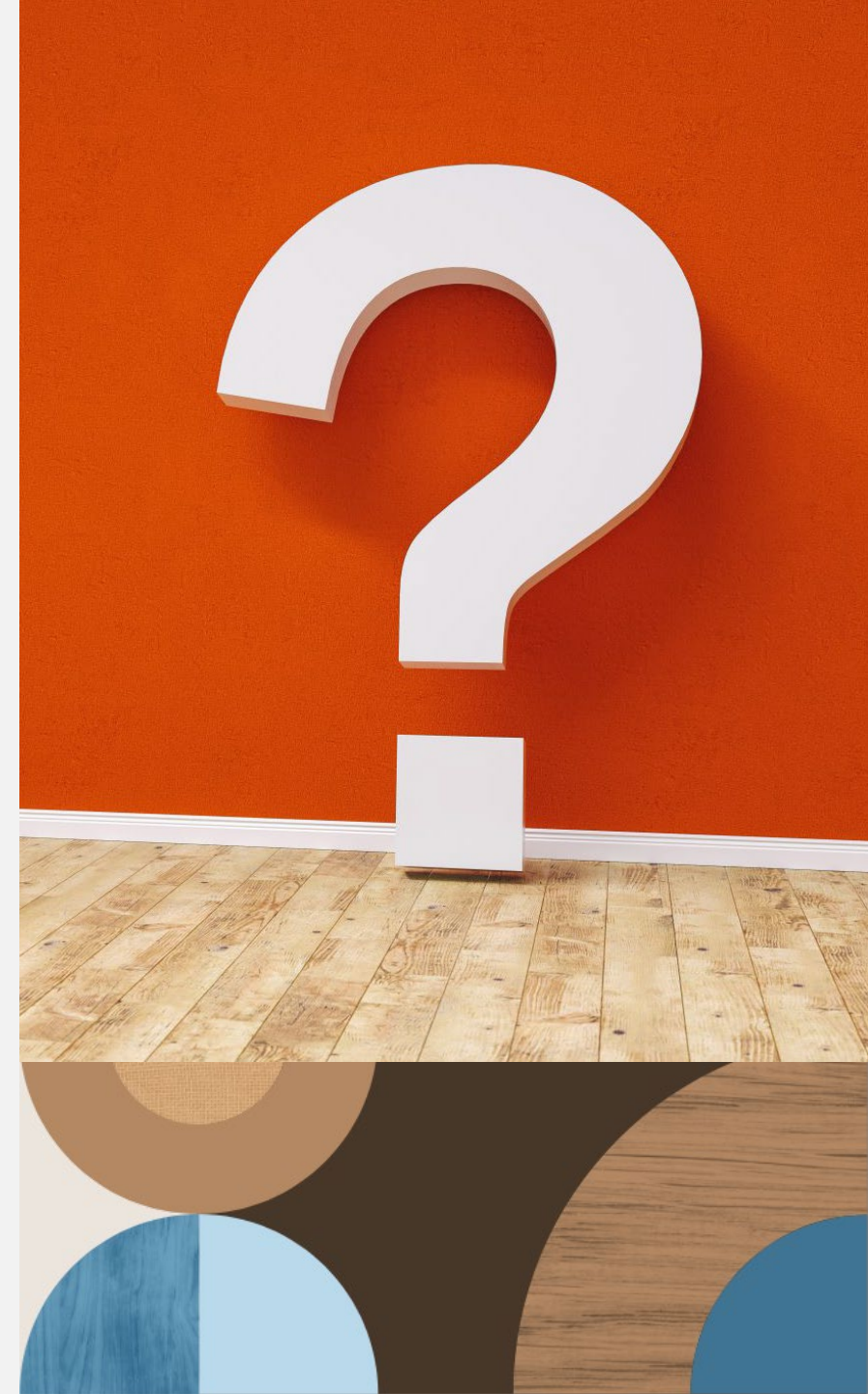
# The Big 6 AI LLM Platforms

- Perplexity
- Gemini
- CoPilot
- ChatGpt
- Claude
- Grok



# Questions To Ask Before Choosing Your Chatbot

- What Happens when the Bot goes Wrong?
- Does this tool require access to personal, confidential, or sensitive information?
- Are the goals, rules, and expectations clear and aligned?
- Is this tool actually better than the alternative?



# Take Out Your Phone - Practical

Talking To AI <https://gandalf.lakera.ai/baseline>



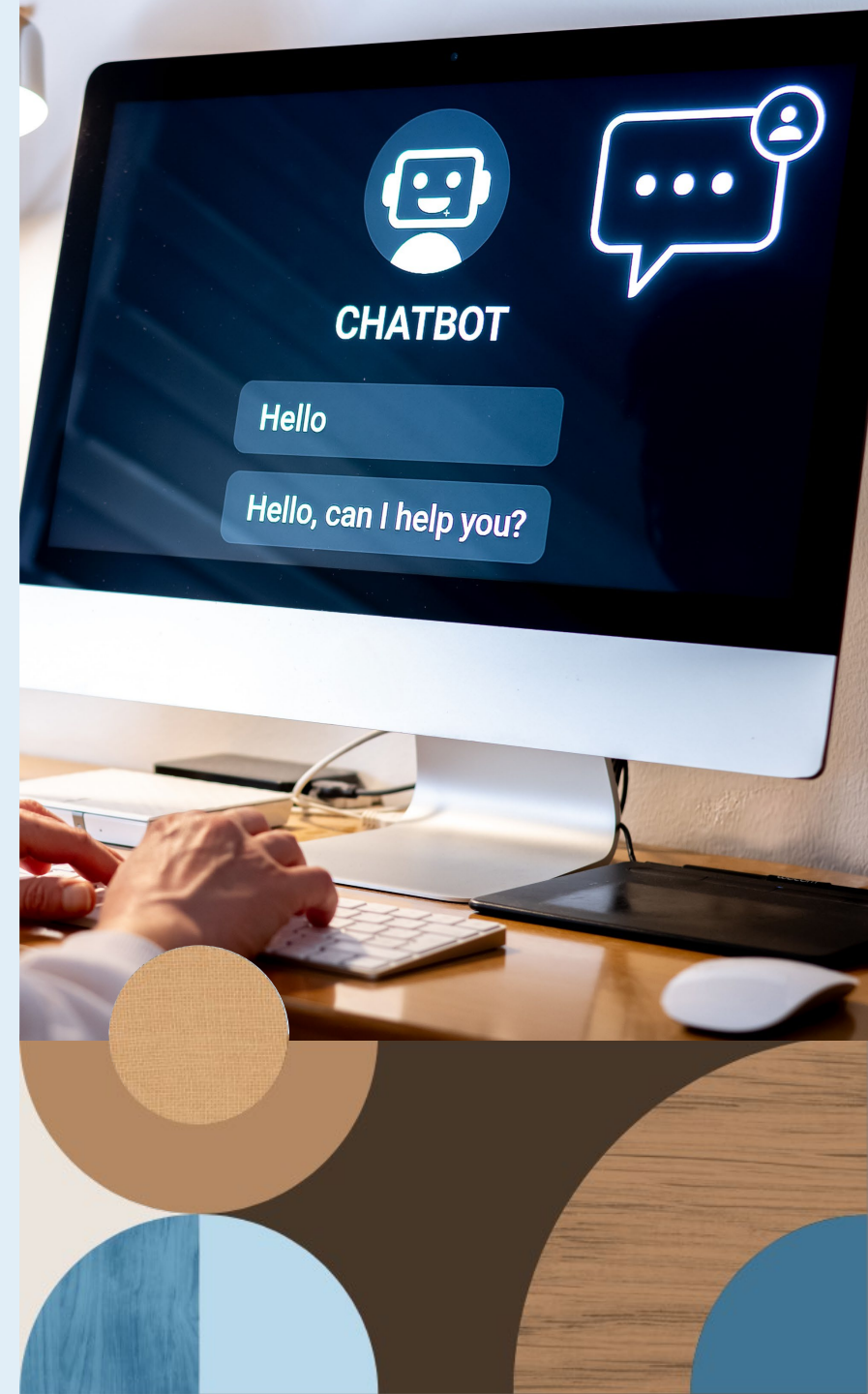
# Why Build One?

## Benefits of Chatbots

- Increase staff efficiency
- Improve knowledge transfer
- Deliver responsive support services

## Operational Streamlining

- Automates routine queries
- Frees staff to focus on higher-value work
- Enhances satisfaction for members *and* staff



# Example

- Records Management
- Bylaw Assistant
- Policy Assistant
- Contract Management
- Council Report
- Accounts Receivable



# Define Your Chatbot's Purpose and Scope

## Identify Chatbot Purpose

- Clarify the specific problem the chatbot will solve
- Ensure it meets user needs effectively

## Define Target Audience

- Decide who the chatbot is designed to serve (staff, department, etc.)
- Identify what information they need access to

## Outline Key Tasks and Workflows

- List the tasks and processes the chatbot will support or automate
- Focus on areas where efficiency can be gained



# Collect and Organize Your Data



## **Inventory Existing Documentation**

- Gather relevant documents: policies, FAQs, emails, process updates

## **Organize by Category and Clarity**

- Group content by topic for easy retrieval
- Ensure consistency and clarity for accurate chatbot responses

## **Inventory Existing Documentation**

- Keep data current with policy changes, process updates
- Build an update cycle for sustained accuracy



# Planning and Preparation



# Design and Development



# Deployment and Maintenance

# Test, Launch and Train Your Team

## **Pilot Testing**

Conduct pilot testing with a small user group  
Gather feedback to refine responses

## **Staff Training**

Provide demos, guides, and Q&A sessions  
Ensure team members are confident using and supporting the chatbot

## **Formal Launch**

Announce launch with clear expectations  
Encourage adoption with communication and support



# Maintain, Update, and Monitor Your Chatbot

## **Continuous Maintenance**

Regular updates keep chatbot effective and aligned with user needs

Add new documents and retire outdated content

## **User Feedback Monitoring**

Collect and analyze staff/member feedback

Identify improvement areas for better interactions

## **Performance Review Meetings**

Schedule regular reviews of chatbot performance

Use insights to guide refinements and improvements



What internal processes at  
your local government  
could a chatbot help you  
save time on?



# Questions?



**Daphne Thomson**

***Catch The Beat***

AI Consultant

[daphne@catchthebeat.ca](mailto:daphne@catchthebeat.ca)



**Claudia Chan**

***MIABC***

Manager of Digital Strategy and Technology

[cchan@miabc.org](mailto:cchan@miabc.org)