

Build Your First AI Chatbot



CATCH THE BEAT



MUNICIPAL INSURANCE ASSOCIATION
OF BRITISH COLUMBIA

WHAT IS A CHATBOT?

An AI chatbot is a tool that answers questions and helps staff quickly find trusted information from policies, procedures, and internal knowledge, without digging through emails, folders, or documents.

WHAT CHATBOTS ARE (AND ARE NOT)

THEY ARE:

- A support tool for staff and members
- A way to reduce repetitive questions
- A way to improve consistency

THEY ARE NOT:

- Always correct
- Difficult to use
- A replacement for people

WHY BUILD ONE?

- Saves staff time
- Improves knowledge sharing
- Reduces burnout
- Improves service experience

START HERE

Define your purpose and audience:

- What problem are you solving?
- Who is it for?
- What questions should it answer?

Prepare your content:

- Use existing policies, guides, FAQs, or emails
- Make sure information is organized and up to date

If the content is messy, the chatbot will be too
Start with one simple use case

BUILD IN 5 STEPS

- Pick a use case
- Gather 5–10 key documents
- Clean and organize content
- Upload + create chatbot
- Test with real questions

PRIVACY FIRST

- Only use approved content
- Follow your organization's AI and data policies

TIPS

- Start small
- Keep answers simple
- Test with real users
- Improve over time

BEFORE YOU LAUNCH

Ask:

- Does it give useful answers?
- Is the information accurate?
- Is it safe and approved?

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