AI PLAYBOOK 41

AI Quick-Start for Marketers Part 3: Chatbots and Workflow Automation

March 2026

CANADIAN MARKETING ASSOCIATION

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Content partially generated by artificial intelligence, refined by human expertise.

This Playbook is part of the CMA's AI Mastery Series, empowering marketers to Implement AI in ways that earn regulatory confidence, maintain strong brand reputation, and foster consumer trust

What you'll learn

You've built your AI workflow foundation with Part 1 and Part 2 by implementing social listening, Copilot to summarize meetings and draft emails, email personalization, content repurposing, performance reporting and lead scoring.

This playbook will take you beyond assisted workflows to fully autonomous operations:

- Workflow 7: Customer service chatbot handling inquiries 24/7 with intelligent escalation
- Workflow 8: Event marketing orchestration managing complete lifecycles automatically
- Workflow 9: Multi-channel lead qualification across web, WhatsApp, and Messenger

What you'll learn:

- Build and deploy conversational AI resolving customer inquiries autonomously
- Configure chatbots step-by-step across Voiceflow, Copilot Studio, Botpress
- Chain multiple AI actions into workflows running in the background
- Troubleshoot common chatbot and orchestration issues

These aren't single-action automations. They're complete processes that run autonomously in the background, making decisions, adapting to context, and only escalating when they genuinely need human judgment.

While these implementations are marketer-led, collaborate with IT and legal/compliance. This playbook focuses on what marketers own, conversation design, knowledge base development, content strategy and user experience optimization.

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Conversational AI and orchestration

We have moved from AI as an assistant, helping you write better, to AI as an operator, doing the work for you. Here's what that means practically:

- Assisted: You use AI to draft an email response to a customer inquiry. You review it, edit it, and send it. Time saved: 5 minutes per inquiry.
- Autonomous: A chatbot receives the customer inquiry, searches your knowledge base, provides the answer, confirms the customer is satisfied, and logs the interaction in your CRM. You never see it unless the bot escalates. Time saved: 100% of routine inquiries.

Traditional automation triggers one action. You get an email, it creates a task. That's helpful but limited. Orchestration chains multiple AI actions together with decision logic between them.

Example: A prospect registers for your webinar. The orchestration workflow automatically enriches their LinkedIn profile, checks your CRM to see if they're an existing customer, sends them a personalized pre-event email highlighting sessions relevant to their role, monitors whether they attend, scores their engagement during the event, and routes them to sales, or nurture based on that score, all without you touching it.

The performance focus is shifted from how fast can handle inquiries to how fast do customers get answers.

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Get ready: What you need before you start

Before implementing any workflow, complete this readiness checklist.

Data foundation:
- Clean CRM data (complete contact records, accurate company information)
- Organized knowledge base (help docs, FAQs, policies in one accessible location)
- Documented current processes (map manual workflows you'll automate)

Technical access:
- API keys for CRM, email platform, event tools, ticketing system
- Admin credentials or ability to request within 48 hours
- Developer accounts for WhatsApp Business API, Meta Business Suite (requires 1 to 2 weeks for verification)

Team assignments:
- Bot trainer (reviews conversations weekly, updates knowledge base, 2 to 3 hours weekly)
- Escalation responder (receives bot escalations, defined response time)
- Workflow owner (monitors automation health, fixes broken integrations)

Readiness self-check: Confirm CRM data cleaned, knowledge base organized, API access secured, team roles assigned, regulatory compliance verification, privacy policy updated before proceeding to implementations

You will need IT support for API authentication, system integrations, and technical troubleshooting. Marketing owns content, conversation design, and user experience. IT owns infrastructure, security, and platform maintenance.

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Workflow 7: Customer service chatbot

Workflow 7 deploys conversational AI handling tier-1 customer inquiries around the clock, escalating intelligently with complete context when needed.

Readiness checklist

- Comprehensive knowledge base (help docs, FAQs, policies)
- Chatbot platform selected (Voiceflow or Copilot)
- CRM and ticketing system integration confirmed
- Team member assigned to daily bot review (15 minutes)

Implementation

Timing	Actions
Weeks one to two	Audit and upload customer service documentation to knowledge base, design conversation flow with AI disclosure greeting, configure confidence threshold (start at 75%), set up escalation triggers
Weeks three to four	Integrate CRM lookup for returning customers, connect ticketing system for automatic ticket creation, configure human takeover with full conversation context, test extensively with robust sample conversations
Week five onward	Deploy on website only to start, monitor daily, refine knowledge base based on gaps expand to WhatsApp Business, then Facebook Messenger once stable

Scaling next: Add SMS channel, implement French-Canadian support, create industry-specific knowledge bases, build predictive routing for high-value customers.

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Workflow 8: End-to-end event automation

Workflow 8 manages complete event lifecycle from registration through personalized post-event follow-up autonomously.

Readiness checklist:

- Event platform selected (Eventbrite, Zoom, or Hopin)
- Orchestration tool chosen (Zapier Central)
- CRM, email platform, and LinkedIn enrichment service connected
- ChatGPT API access for content generation

Implementation:

Timing	Actions
Week one	Map current manual event process, create registration trigger in orchestration platform, set up profile enrichment with LinkedIn data, test data flow with dummy registration
Week two	Build pre-event nurture sequence (day 7, day 2, day of event, configure AI-personalized agenda recommendations, set up calendar invites and joining instructions, schedule communications relative to event date
Week three	Connect to event platform engagement API, build scoring logic (sessions attended, polls answered, questions submitted), test scoring with historical event data
Week four	Design post-event routing: no-shows get recording, low engagers get standard follow-up, high engagers trigger sales notification, configure ChatGPT to generate FAQ from event questions, test complete workflow end-to-end

Scaling next: Expand to multi-day conferences, add sponsor engagement tracking, implement real-time sentiment analysis, create automated speaker briefings.

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Workflow 9: Omnichannel lead qualification

Workflow 9 deploys conversational AI across website, WhatsApp, and Facebook Messenger to qualify, and route leads 24/7.

Readiness checklist:

- Chatbot platform selected (Botpress or Salesforce Einstein)
- Qualification criteria defined (scoring thresholds for hot/warm/cold)
- CRM integration confirmed
- WhatsApp Business verified (allow 1 to 2 weeks)
- Meta Business Suite access secured

Implementation:

Timing	Actions
Week one	Define ideal customer profile and scoring criteria, map qualification conversation flow, build decision tree in chatbot platform, test conversation naturally gathers company size, budget, timeline, pain points
Week two	Create scoring variable incrementing based on responses, configure CRM lookup to check for existing contacts, add data validation for email format, company name
Week three	Build routing rules: score 50+ creates hot lead and Slack notification, 30 to 49 adds to nurture, under 30 provides self-service, configure instant meeting booking for hot leads, set up nurture campaign enrollment for warm leads
Week four	Deploy on website with embed code, integrate WhatsApp Business API Connect Facebook Messenger through Meta Business Suite, test channels

Scaling next: Add SMS channel, implement voice bot for phone inquiries, create industry-specific qualification paths, build account-based routing.

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Configuration essentials

Success depends on how you configure the workflows. These are foundational settings that determine whether your systems operate reliably or require constant troubleshooting. Get these right from the start and you'll avoid delays.

1. **Memory management:** Enable persistent context so bots remember across sessions. Store key data in CRM, retrieve at conversation start for returning users.
2. **Confidence thresholds:** Set at 70 to 80% to balance accuracy and escalation. Too high (90%+) causes unnecessary escalations, too low (50 to 60%) provides unreliable answers. Monitor and adjust as needed, more frequency at the start.
3. **Human-in-the-loop triggers:** Define mandatory approvals for financial transactions over a set amount, legal requirements, public messaging, customer refunds, data deletion requests.
4. **Knowledge base maintenance:** Schedule ongoing reviews. Pull analytics showing frequently asked questions, low confidence scores, escalation patterns. Update knowledge base, remove outdated content, add new FAQs.
5. **Error handling:** Configure retry logic (3 attempts with exponential backoff), error notifications to operations team, fallback behaviors when APIs fail. It's important to never leave customers in broken experiences.

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Configuration essentials

Most chatbot problems are fixable by marketers, they're content and conversation design issues, not technical failures. Here's how to diagnose and fix a few common performance issues.

Escalate to IT if you encounter API authentical failures, platform outages, integration breaks and security concerns.

Issue	Solution
Low confidence scores (bot escalates 50%+ of conversations) Example: Bot constantly says "Let me connect you to someone"	Pull escalation transcripts, group by topic, add detailed FAQs with multiple customer phrasings
Conversations feel robotic Example: Low satisfaction scores (below 60%), high abandonment	Add conversational tone, acknowledgments ("Got it!"), empathy for frustration, reduce required fields
Outdated information Example: Wrong answers, references to discontinued products	Schedule regular knowledge base updates for product launches, policy changes

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Recommended reading and references

For further learning, these resources provide practical guidance on responsible AI adoption, strategy, and implementation.

CMA resources

- CMA Guide on AI for Marketers
- Setting the Stage on Artificial Intelligence: A CMA Primer on AI for Marketers
- CMA Accountability Checklists for AI in Marketing
- CMA Mastery Series: AI Playbooks
- CMA Generative AI Readiness Survey
- Canadian Marketing Code of Ethics and Standards

External resources:

- Voiceflow: How to Create a Chatbot 2026
- Destination CRM: Top Customer Service Trends and Technologies for 2026
- Microsoft: Create flows using Copilot
- Zapier Central tutorial for beginners
- Atlan: Context drift detection

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The CMA

This playbook is developed with guidance by the CMA AI Committee and is part of the CMA's comprehensive AI initiative designed to empower Canadian marketers with the knowledge, skills, and ethical frameworks needed to implement AI responsibly and effectively.

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