

Onboarding Best Practices

1 Baseline your bot program

- » Business goals
- » Business impact
- » Customer journey

2 Understand your data

- » Review data outputs and bot design
- » Integrate to Dashbot*
- » Align team members

3 Monitor performance

- » Configure reports
- » Benchmark metrics and customer journey
- » Take action on priorities

4 Operationalize

- » Integrate Dashbot into operating processes
- » Define & launch bot maturity roadmap

*Dependency for platform launch