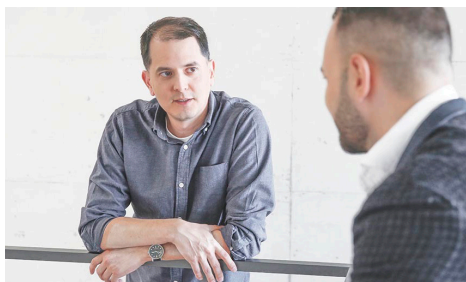


AI CHATBOT

AI Chatbot – Guide to Implementing AI-Based Chatbots in Companies



1. INTRODUCTION

Artificial intelligence is a hot topic — and for good reason. Rapid technological advancements have produced a wide range of chatbot solutions, offering companies diverse applications. We hear from our clients, though, that actual adoption in the corporate environment is often more challenging than expected. Many companies struggle with integrating these new technologies into their existing processes effectively. At the same time, issues such as data protection, compliance, ethics, and a lack of a clear corporate strategy in dealing with AI solutions pose significant challenges.

This whitepaper is dedicated to the central applications for AI chatbots in companies, providing practical advice on what to consider during implementation. It

not only highlights the technical and organizational prerequisites but also discusses whether and to what extent organizations need professional consulting on chatbot solutions. The goal is to provide companies with a comprehensive guide that reveals both opportunities and potential risks.

By addressing key issues such as handling sensitive data, complying with legal requirements, and creating a company-wide AI strategy, we help decision-makers make informed and forward-looking decisions. This whitepaper not only provides an overview of the currently available technologies but also shows how companies can optimally utilize the diverse potential of AI chatbots.

2. FOCUS ON THE ESSENTIALS

For the successful application of AI in a business context, it's important to focus not only on technology, but also on aligning the organization with the uses that truly deliver added value.

ChatGPT was released on November 22, 2022, and since then the topic of artificial intelligence has been embedded in nearly every organization — ranging from conceptual strategies to concrete implementation initiatives. At the same time, however, AI remains a very flexible buzzword for everything one «should» be doing. Over the past two years, we have observed a wide range of approaches and speeds among our clients, with results that could hardly be more different.

What has emerged as a clear tendency in distinguishing successful initiatives from sluggish ones is a conscious focus on the following factors:

1. Every organization faces an abundance of potential AI applications, not a shortage.
2. Success with AI comes from prioritizing use cases that deliver clear business value and lie within the organization's current capabilities.
3. Work on use cases that are still out of reach is essential, but these should be treated and budgeted as exploration. The key measure of success is the knowledge gained and the number of new value cases created — not ROI.
4. Investing in a cross-organizational, accessible, and well-governed data platform always pays off and should be accelerated.
5. Employees quickly recognize where AI helps and engage with it. By listening, enabling teams, and measuring results with facts, both opportunities and misconceptions are revealed early.
6. AI capabilities evolve almost monthly, and with them new opportunities constantly emerge.
7. Costs remain opaque and tend to grow on their own. Exploratory Proofs of Concept (PoCs) help by quickly making cost structures visible.
8. Launching AI initiatives can be fast, but optimization requires perseverance and must be supported by ongoing process and organizational adjustments from the very beginning.
9. Not every case requires the use of Generative AI (GenAI). In many instances, traditional models can deliver value quickly and effectively.

90%

of companies worldwide have launched digitalization projects in the past two years. Nevertheless, on average, only 31% of the targeted revenue increases and 25% of the expected cost savings were realized

In some industries, the entire organization doesn't need to undergo a holistic AI transformation to realize added value here. When it comes to AI chatbots, the following categories have now clearly established themselves as value drivers:

1. Internal Knowledge Bots

Fast, simple, and well-controlled access to internal know-how delivers obvious added value. Here too, simple cases can be started quickly, and adoption can then be implemented into further areas where team members will benefit from easier access to institutional knowledge.

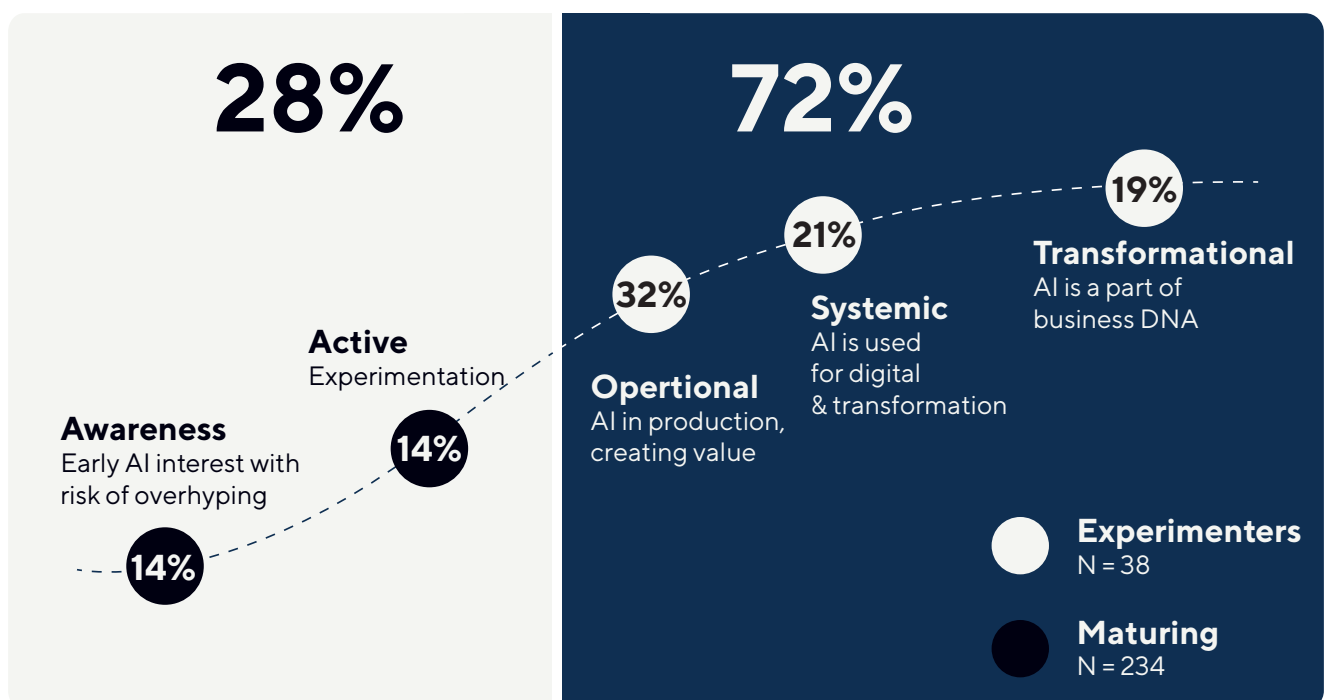
2. Customer Service Bot

An analysis of completed service cases often quickly reveals which tasks can be automated — or at least supported — by AI. As an initial step, service agents can be equipped with a digital assistant,

increasing efficiency and significantly accelerating the onboarding of new staff. As confidence with the technology grows, the assistant can also begin handling selected customer inquiries directly, including via voice. In early implementations, customer satisfaction and experience often serve as the more critical KPIs than cost savings.

3. Digital Sales Advisors

Similar to the experience they would have in a physical sales location, customers also want a way to raise questions about offerings in the digital space. A digital sales advisor can support sales teams from the outset, providing targeted enablement and rapidly bringing them up to speed. Over time, it can also be deployed directly in customer interactions. As with all AI applications, implementation should only proceed if it demonstrably enhances the customer experience.



Gartner AI Maturity Model
Weighted to NAICS US industry split.

3. OVERVIEW OF AI CHATBOT TYPES

The currently available chatbot types can be roughly divided into several categories, each using different approaches and technologies:

One of the most basic variants is the **rule-based chatbot**. These operate based on predefined rules and decision trees. That makes these chatbots ideal for simple, structured tasks, but they quickly reach their limits in more complex conversations.

Retrieval-based chatbots go a step further by drawing on a large pool of pre-made responses and selecting the most appropriate one. This approach allows for a slightly more flexible response to user inputs, but the chatbot remains limited to the available responses.

Currently, the most advanced models are **generative chatbots** based on deep learning methods. They generate responses in real-time by drawing on extensive training data. This technology enables context-dependent and dynamic communication but also brings challenges regarding the control and accuracy of the generated content.

Hybrid chatbots combine elements from rule-based and generative approaches. This combination allows them to map structured processes while flexibly responding to complex user queries.

Since both rule-based and retrieval-based chatbots don't use AI, they won't be further discussed in this whitepaper.

Layered on top of all of this, there are **domain-specific chatbots** developed specifically for certain industries or tasks to provide tailored solutions. Finally, since many companies serve customers across multiple languages, they may turn to multilingual chatbots to meet global requirements and facilitate international use.

The rapid development in the field of artificial intelligence ensures that these technologies continue to evolve. Therefore, companies should consider not only current possibilities but also future developments when selecting a chatbot type.

Answering Systems in Comparison

From IF to AI

Type	Functionality	Advantages	Disadvantages
Rule-based	IF-THEN logic	Simple, predictable	Inflexible, not scalable
Retrieval	Retrieve answer from database	Fast, consistent	No genuinely new answers
Generative	Answer is dynamically generated	Creative, context-sensitive	Sometimes inaccurate, may hallucinate
Hybrid	Combination of rules and AI	Balanced, scalable	Complex to build and maintain

4 . APPLICATION AREAS

When the previously mentioned agent types are mapped onto the different phases of the customer journey, concrete and actionable use cases can be derived. At gateB, we have identified six central fields of application, ranging from external chatbots on the public website to internal solutions connected to company systems. As these areas of application scale up, complexity increases and additional questions arise around topics such as data protection, access rights, and ethics.

Function	External Users	Customers	Internal Users
Marketing	Web Assistant	Web Assistant	
Sales	Self-Service Assistant	Configuration Assistant	
Service	Support Assistant		
Internal Enablers			Onboarding Assistant, Training Assistant

Web Assistant

This is the classic chatbot that's accessible on a public website. AI integration allows visitors to query any information from the site, with direct links to the source of the answers.

Application areas include:

- Support with product selection
- Job postings
- Opening hours
- Contact information

Self-Service Agent

This type of chatbot integrates into customer systems and allows clients to call up personalized information. A distinction can be made here between querying information (passive use) and submitting requests (active use).

Possible use case	
Passive use (Read)	<ul style="list-style-type: none"> - Checking order status - Retrieving information about products in use (e.g., interest rate, account details) - Accessing customer contracts
Active use (Write)	<ul style="list-style-type: none"> - Submitting an address change request - Filing a complaint - Sending a support inquiry - Making booking requests

Onboarding Agent

This is an internal application for employees within the company. This bot supports internal questions and topics. It might assist new employees during onboarding, for example.

An internal chatbot can efficiently support staff with recurring HR and process-related queries, such as:

- Checking current vacation balance
- Accessing pay slips
- Supporting with time tracking
- Delivering first-level IT support (e.g., resetting passwords, device issues)
- Submitting and tracking expenses claims

Training Agent

This supports employees with practice-oriented training content for software and processes in everyday work. Typical use cases include:

- Step-by-step instructions for invoicing in the ERP system
- Guidance on project creation in Salesforce
- Additional context-specific explanations for company-specific tools and workflows

Configuration Agent

This provides technical support to customers through targeted training content and documentation for daily software use.

Typical use cases include:

- Providing technical guides for software developers
- Access to documentation for IT support and system administration

Support Agent

As a digital sales support tool, this chatbot gives customer advisors real-time access to customer data through integration with CRM systems. Similar to the Self-Service Assistant, a distinction can be made between passive use (read-only) and active use (read and write access).

Possible use cases

Passive use (Read)

- Retrieving customer history
- Analyzing customer behavior
- Accessing performance metrics

Active use (Write)

- Updating contact details
- Entering orders
- Initiating customer processes (e.g., account opening, account closure, payment order)

«Our company-internal GPT-powered chatbot provides employees with fast and secure access to all relevant compliance and IT security information – a clear added value that also helps in the context of ISO certification.»

Sascha Salis, Brand Leadership Management AG, Group CIO & CISO

5. PREREQUISITES FOR SUCCESSFUL AI CHATBOT IMPLEMENTATION

The successful implementation of an AI chatbot requires companies to take several key factors into account. It demands a solid technological foundation, clear organizational strategies, and strong data and domain expertise. To optimally integrate the chatbot into existing processes, the following prerequisites must be met:

- **Clear, company-wide strategy and vision for AI chatbot integration**

A precise definition of objectives and a strategic framework make it easier to embed the technology smoothly into existing business processes.

- **Early consideration of data protection and compliance**

Data protection regulations and legal requirements must be adhered to from the very beginning to secure the trust of both customers and employees.

- **Modern IT infrastructure**

Seamless integration of chatbot solutions is only possible if companies have up-to-date systems that are flexible and scalable.

- **A robust, centralized, and always up-to-date data foundation**

The chatbot requires reliable, consistent, and accessible data to deliver accurate responses.

- **Effective data management**

Close coordination between IT and other business departments ensures that all relevant information is properly structured and continuously maintained.

- **Expertise in AI, data science, and software development**

This knowledge must either be available internally or be supplemented by external experts to overcome technical challenges.

Our recommendation: Start with pilot projects

Since fully meeting all prerequisites at the beginning is often unrealistic, it is advisable to start with exploratory pilot projects in a protected environment. This allows technological, organizational, and data-related aspects to be evaluated step by step, initial experience to be gained, and, at the same time, internal trust in the new technology to be built. Successful pilots create a reliable foundation for a broader rollout later on.

31%

of the executives surveyed state that artificial intelligence is not yet on their board's agenda. This is a clear indication of the lack of a strategic anchor and unclear responsibilities in AI governance at the leadership level

6. STEPS FOR SUCCESSFUL AI CHATBOT INTRODUCTION

From our experience, a holistic approach is critical for the sustainable success of AI chatbot initiatives. Individual technologies or isolated use cases rarely create long-term value. Instead, a structured end-to-end approach is recommended, one that considers all relevant dimensions — from strategic alignment to technical implementation and operational integration.

The process begins with an analysis of the overarching corporate strategy, particularly around customer interaction, automation potential, and digital service experiences. Building on this, a targeted data strategy can be developed that clearly defines how structured and unstructured information is handled, ensures data quality, and establishes responsibilities.

The next step is to design a consistent data and knowledge framework, which forms the foundation for the chatbot logic and for later integration of retrieval or generative AI components. Only then does the actual implementation begin, with chatbot setup consisting of

conversation design, selection of the appropriate technology stack, and initial training and testing phases.

Another key building block is model optimization. Through iterative training, feedback loops, and realistic user testing, the quality of responses is continuously improved — both in terms of content and with respect to user guidance, tone of voice, and performance.

Finally, seamless integration of the chatbot into existing tools, systems, and processes — such as CRM, ERP, or HR platforms — is essential. This is the only way to create a consistent, user-centered experience that effectively supports both external customers and internal employees while delivering real value.

Based on a company’s needs, gateB can provide support across all of the areas mentioned above, or selectively in specific areas if some components are already defined and implemented.

Value Use Case

Data Strategy & Concept	Chatbot Setup	Model Optimization	Integration and Scalability	Strategic Guidance
High-quality data is critical for optimal chatbot performance. By preparing and cleaning up your data, you can eliminate inconsistencies and improve accuracy throughout the chatbot's operation. Furthermore, models can be trained to cater specifically to your industry and unique use cases, making the chatbot more effective in addressing your specific business needs.	To help your chatbot align closely with your business goals and user expectations, you can configure its rules and behavior to provide tailored interactions. Additionally, the chatbot's responses can be formatted and personalized to deliver polished, context-aware answers that resonate with your audience. Secure access controls can also be implemented, allowing only authorized users to interact with the system in a safe and reliable manner.	Choosing the right model is essential for a successful chatbot deployment. You'll receive support in selecting the most suitable model and transitioning to a new one, if necessary, to keep up with changing demands. Once operational, your chatbot can be continuously improved and optimized, with regular updates and enhancements helping its performance remain cutting-edge.	Integrating your chatbot with existing tools, platforms, and workflows can be done seamlessly, creating a smooth connection between systems. As your business evolves, the chatbot can adapt through scalable, modular upgrades, enabling the addition of new features and functionalities to meet growing requirements.	Expert strategic guidance is available to help you implement, grow, and scale your chatbot effectively. With professional advice, you can make informed decisions at every stage of the process, helping your chatbot deliver maximum value and reach its full potential.

7. CONCLUSION

AI chatbots have become indispensable tools for modern companies that want to enhance their customer interactions. To unlock the full potential of AI chatbots, organizations must prioritize these key factors:

- **Data Protection:** Ensuring that customer data is handled with the highest level of security is critical. The implementation of encryption protocols and regular audits can help prevent breaches.
- **Compliance:** Adhering to relevant regulations, such as GDPR or CCPA, is essential. This includes transparent data usage policies and obtaining proper user consent.
- **Company-wide Strategy:** The integration of AI chatbots should be part of a comprehensive digital transformation initiative. Collaboration across departments increases the effectiveness of chatbot deployment.

In addition, the use of appropriate technologies is fundamental to chatbot success. Advanced platforms

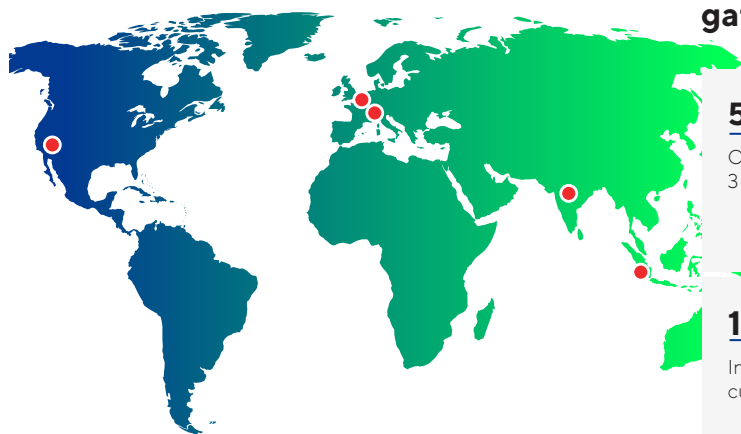
such as Google Dialogflow or Microsoft Bot Framework provide robust foundations for the development and maintenance of chatbots. Effective data management practices, such as centralized databases and real-time analytics, help companies achieve optimal performance.

It's also important to keep track of AI progress, including new algorithms, innovative applications, and emerging trends. Continuous learning and adaptation enable companies to refine their chatbot solutions, making them more intuitive and responsive. This proactive approach not only maximizes the benefits of chatbots but also positions companies at the forefront of technological advancement.

In conclusion, AI chatbots represent a transformative opportunity for businesses seeking to revolutionize customer service and operational efficiency. By focusing on data protection, regulatory compliance, strategic integration, and the adoption of cutting-edge technology, companies can successfully implement and fully benefit from these intelligent systems.

«In our client projects, we see that AI generates the greatest visible value when the use cases are very specific and clearly focused on a concrete value contribution, when people are properly empowered, and at the same time a solid data foundation is established.»

Marco Wyler, Managing Director



gateB at a glance

5

Offices on
3 continents

2009

Founded in
Switzerland

5

Digital experts,
data scientists
and software
engineers

120 +

International
customers

All

Industries
covered

25

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We are a consulting and implementation company that empowers national and international companies to tap into digital potential and make their customer and investor relationships faster and smarter.

Through the intelligent use of data and technologies, we transform relevant business processes and generate quantifiable added value for international companies and brands.

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