

Ten decisions before you click "Start Free Access".

Everything after the click costs credits or time. The switch-on takes an hour and looks plausible. Something you would trust to speak for your business takes these ten decisions first. Tick each one off with a name next to it.

01	Which chatbot ☐ Chatflow for deterministic jobs (menus, routing). Customer Agent for generative answers. Reply recommendations for reps. Mature setups use all three. Never put a menu on a credit meter. Owner: _____ Decided: ____ / ____	02	Which sources ☐ A curated crawl with path exclusions (blog, gated, press, locales, events, investor, legal), pillar guides as individual URLs, reference material as uploaded files. Fewer, cleaner pages beat more. Owner: _____ Decided: ____ / ____
03	Who owns each source ☐ A named owner per synced source and a named person who triggers refreshes. Stale content degrades the agent silently. Owner: _____ Decided: ____ / ____	04	The one behaviour that must work every time ☐ Build it as an action, not a guideline. Guidelines are suggestions. Actions are commitments. Owner: _____ Decided: ____ / ____
05	What a resolution costs ☐ A resolution is a cited source or an action with no handoff within 72 hours, or a qualified lead. Set the credit cap before you click. Billing lags volume by three days. Owner: _____ Decided: ____ / ____	06	Trial length ☐ Fourteen days. Get it in writing from HubSpot. The clock starts on "Start Free Access", not on deployment. Owner: _____ Decided: ____ / ____
07	Where the prompts live ☐ Instructions, guardrails and action definitions in a repo. A regression bank run after every change. A bug form anyone can use. A release cadence. Owner: _____ Decided: ____ / ____	08	How you throttle launch traffic ☐ HubSpot has no first-N-visitors control. Choose timed windows, targeting rules or an A/B holdout before launch day. Owner: _____ Decided: ____ / ____
09	Who approves ☐ Web, support, docs, legal, sales and the HubSpot admin. Each is a separate conversation. Map them on day one. Owner: _____ Decided: ____ / ____	10	What you defer ☐ Live chat (a programme, not a toggle), extra languages, CRM segments. One language, one mission, one handoff first. Owner: _____ Decided: ____ / ____

**The demo takes an hour.
A working AI chatbot takes the next month.**

Want a second pair of eyes on your deployment? Email matthew@articulatemarketing.com or book a Customer Agent readiness call at articulatemarketing.com/meet.