

10 Tips to a Better CX Chatbot



CHECKLIST

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CHECKLIST



rulai
AI for CX

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START HERE:

The development of your gift on the following page - **10 Tips to a better CX chatbot** has been led by Dr. Yi Zhang, professor at the University of California at Santa Cruz. Dr. Zhang has worked with organizations like IBM, Alibaba, HP, Toyota, Ex Libris, and the University of Pittsburgh Medical Center on AI.

As a world-renowned professor and researcher in the field, she tries to help people organize their thoughts on chatbots and AI from two perspectives.

One perspective is to look at the technologies behind AI chatbots. There are in general three generations of technologies used today.

The second perspective is to look at the technology landscape by reviewing use cases that can be handled.

This checklist provides general guidelines and best practices that can be used with many of the technologies that exist today.

Use Cases for AI:

There are many ways to implement AI chatbots in your organization. The key is to start with the simple and common, get quick wins and then proceed to more complex use cases.

The most significant benefits of Artificial Intelligence to improve the customer experience do require you to push your thinking to the next level.

Next Steps...

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10 Tips to a Better CX Chatbot - Checklist

BE AWARE: The best bot builders are customer experience domain experts. Bot builders that are intimate, have empathy, and business acumen in your customer experience will dramatically improve your success when your bot is deployed. These tips are currently being used to build 3rd Generation AI chatbots that can scale up to accelerating your desired business outcomes. [Click here to learn](#) about the different generations of chatbots for CX.

Prepare/gather Data

- Flowcharts, FAQs, chat history, Journey Maps, and use cases are all valuable in determining and defining the scope of your bot. Having these items available prior to configuring your bot will make the process exponentially faster.

Start with menu

One of the best ways to provide information about the bot's scope is through the use of menus. Menus allow users to choose a relevant topic and then narrow down their intent based on that topic, providing a more guided experience.

Add Direct Path

- While menus allow for intents to be narrowed down, some users describe what they want (i.e. intent) and want to jump to the solution directly and get problems solved immediately without navigating complex menu tree. It is best to be sure your bot can accommodate it.

Use Buttons if possible

- Buttons are a very useful - perhaps even ideal - way for the bot to offer a menu since they allow users to directly access information and bypass the need for conversation.

Don't pretend to be a human

- Be sure your users are aware that they are chatting with a virtual assistant. This sets users' expectations from the start and alleviates potential frustration later on.

Positioning and Pre-positioning

- Exceptional customer service involves the ability to anticipate and respond to a customer's needs before the customer realizes them. The user should never have to guess why the bot is asking for something or what the next steps are.

Less is More

- Lengthy messages tend to result in a decrease in users' attention and interest. When composing bot utterances, limit blocks of text to fewer than 150 characters. If the bot needs to provide a large amount of information, it should be broken down into smaller blocks to avoid tldr (too long; didn't read) from occurring.

Iterate, Iterate, Iterate

- Once your bot has been released to the public (i.e., gone live), a sample of approximately 50 transcripts could make significant improvements to your bot's performance. Iterations should be frequent in the early stages, but that need will decrease as the bot's performance improves over time.

Give Users an Out

- For many reasons, a user may want to end the chat and interact with a human. It's important that the user knows how to accomplish this at any point in the chat. For example, the user could simply request a human at any time, or the bot could offer an escalation if it isn't sure how to proceed in the conversation.

Enable *Go Back*

- Sometimes, users will want to access a previous options or change information that they have provided. It is worthwhile to configure your bot to allow this and make it obvious for your customers as to how and when they can do it.