



# Your Checklist to a Better CX Chatbot

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## About Dr. Yi Zhang

Dr. Yi Zhang is a professor at the University of California at Santa Cruz and a co-founder of Rulai. Dr. Zhang has worked with organizations like IBM, Alibaba, HP, Toyota, Ex Libris, the University of Pittsburgh Medical Center, and many others on Artificial Intelligence.

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 chatbots, and specifically the level of AI required to create powerful chatbots that don't get confused.

The second perspective is to look at the different industries and use cases that can be automated using chatbots.

## About Rulai

Rulai is a new Enterprise Conversational Computing Platform provider. Rooted in academia, the founding team has a combined 200 years experience in AI research, published over 400 research papers and filed over 80 patents in advanced AI-based dialog management. Its SaaS platform enables companies to build automated chatbots for customer service, marketing, sales, logistics, and HR use cases and has been deployed across a wide variety of industries.

Rulai-based bots help companies automate many human-centered processes to create a fast and frictionless experience for employees and customers. Its self-serve platform allows business users to create and evolve bots with minimal use of precious IT resources. Rulai was recently recognized by Gartner, Forrester, and Bloomberg.

## | YOUR CHECKLIST TO A BETTER CX CHATBOX

**BE AWARE:** The best bot builders are customer experience domain experts. If your bot builders have a deep understanding of what the customer wants, show strong customer empathy, and are focused on the right business outcomes, your bots will be dramatically more successful as a result. These tips assume you are using a conversational computing platform that has the necessary underlying AI capabilities to handle the complexities of human conversations.

### ○ PREPARE/GATHER DATA

Flowcharts, FAQs, human to human 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.

### ○ DESIGN THE PERSONALITY OF THE BOT

For better user experience, design the personality of the bot to represent the brand image of the company. Consider the attractiveness, emotional, philosophical, social and the ethical implications of the virtual assistant. BTW, 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.

### ○ 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 to get problems solved without navigating complex menu trees. Make sure your bot can accommodate this.

### ○ USE BUTTONS IF POSSIBLE

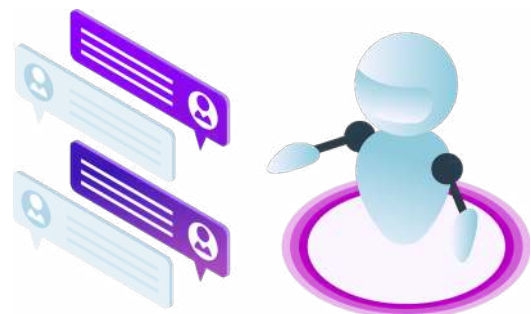
Buttons are a very useful - perhaps even ideal - way for the bot to offer a menu since they allow users to directly access information and bypass the need for conversation.

### ○ 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, break it down into smaller blocks to avoid tl;dr (too long; didn't read) from occurring.



## ○ PAY ATTENTION TO BASIC NAVIGATION ACTIONS AND COMMON ACTIVITIES

User may want to get back, move forward, ask for clarification, ask for help or end the chat. It's important that the user knows how to accomplish these 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.

The bot should be able to carry out some common activities such as opening, offering help, inquiries, making a request, providing instructions, closing a task or a conversation, handling complaints, deal with compliments, insults or apologies.

Some conversational computing platforms have those actions and activities built in by default, and you want to check and customize for your own customers as needed. For platforms don't have those built, you need to build those yourself carefully.

## ○ EVALUATION IS THE KEY TO SUCCESS

Evaluation is very important for your team to understand, learn and systematically improve a virtual assistant. Use both qualitative and quantitative evaluation methods, such as inquiry, user studies, simulation, crowdsourcing. You can do offline evaluation based on annotated data. Once a bot is launched, you also need to constantly monitor and evaluate its online performance based on job specific KPIs, user feedback and/or transcripts analysis.

## ○ ITERATE, ITERATE, ITERATE

Once your bot has been released to the public (i.e., gone live), analyzing a sample of 50 or more transcripts could help you make significant improvements to your bot's performance. Some customers have seen the performance of their virtual assistants double in 2-4 weeks with daily iteration. Iterations should be frequent in the early stages, but that need will decrease as the bot's performance improves over time.

## | NEXT STEPS

Learn how to build better bots by enrolling in our "Mastering Conversational Design" workshop, offered exclusively by Rulai University.

To get notified of upcoming classes, please send an email to [university@rul.ai](mailto:university@rul.ai)

