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Know before you bot

Straight answers to the 10 most
important questions about
getting started with chatbots

Introduction

If you've come to the realization that your customer engagements could benefit from artificial intelligence like chatbots, welcome to the party! It's exciting when new technology can deliver better customer and agent experiences in extremely cost-effective ways.

You're not alone. According to our annual benchmark report, more and more companies are taking bots from vision to reality. Looking at our bot customers:

- Bots are involved in more than half of all chat interactions

- Chatbots field an average of 80,000 chats per month

- 1 in 4 bot interactions have no agent involvement

And it's not just brands that are on board; consumers already accept or even prefer chatbots. According to Aspect Consumer Experience Index, 61% of consumers think that chatbots in customer service is the way of the future. Seventy percent of millennials report positive experiences with chatbots, and many prefer chatbots for the convenience and immediate response.

Chatbots also come with another huge benefit for your customers: 24/7 service. Businesses of any size can answer queries even during off hours – wherever and whenever the customer wants.

Done right, chatbots can actually improve agent efficiency and productivity while delivering better customer experiences. But many organizations don't know how or where to start.

Today, there are broad disparities in chatbot capabilities. While one bot can book you a flight or address you in many languages, others still struggle to complete the single task for which they were designed. In some cases, the technology itself doesn't deliver, but most of the time the real culprit is a lack of training and maintenance by chatbot owners.

Luckily, launching a quality chatbot isn't hard as long as you approach it properly. Whether you're building a customer support chatbot for your website or an engaging marketing bot for Facebook Messenger, be sure to answer these questions to ensure your chatbot meets both customer and business expectations – every time.
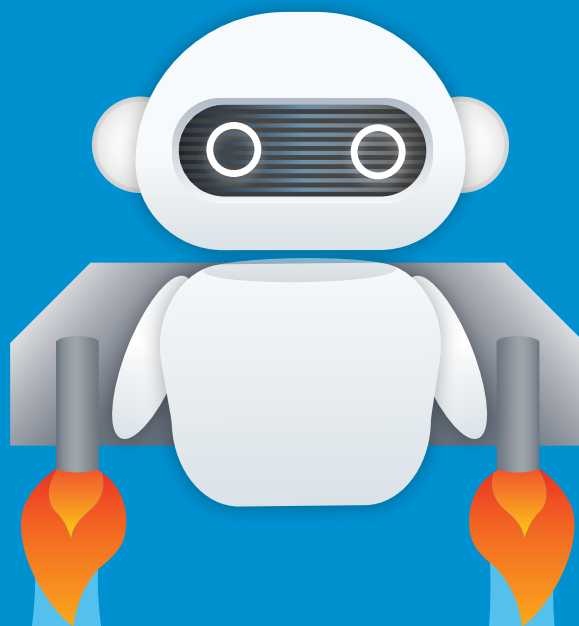
Getting started with AI and chatbots

Before you invest in any new technology, you need to have well-defined goals and expectations. AI and chatbots are no different. Here are 10 questions you need to answer to set yourself up for success:

What will my customers want to do with a bot?

When considering how to implement a chatbot, start by asking what your customers will expect from it. After all, they're the ones asking your bot questions! If your project starts and finishes with listening to your customers and providing them with the help they need, wherever they are, in real-time, you will be more likely to deliver the best possible bot experience.

Bots can be built for sales, support, or marketing, and as such have very different purposes. To understand what your customers will want from a bot, study your chat transcripts, support emails, and/or call logs and apply the Pareto Principle: 80% of your customers are likely asking the same 20% of the questions. Your first step with the chatbot should be to automate these common questions to give your customers the fast responses they're looking for. Don't let your agents sweat the small stuff. When your bot takes over FAQs and repeatable processes, your agents have more time to focus on more complex queries and activities.

Sometimes the best approach is the most straightforward: once you've covered the basics above, go ahead and ask a sample set of customers what they would expect your bot to do for them.

Consider this

Identify opportunities for CX improvements by analyzing your current customer service interactions and build that into your chatbot. Ask your chatbot vendor how you can easily transfer those FAQs and repeatable processes into a bot. Make sure to also ask for case studies or examples. Review both success stories and chatbot fails to see what worked and what didn't to incorporate best practices into your strategy.

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What business outcomes am I hoping to achieve with a bot?

When planning your chatbot, you need to strike a balance between customer and business objectives in order to build a comprehensive strategy. Having a clear goal will help you manage expectations of the bot, set performance targets, and create benchmarks.

Do not embark on a bot initiative unless it clearly supports one or more core business objectives. Some good examples are: reducing operational costs, driving revenue, and increasing customer satisfaction or retention:

1. Bots that reduce costs

Offering your customers a 24/7 support channel powered by bots is far less expensive than one powered by human agents. If you're considering extending your hours, you'll have much to gain by doing it with a bot.

2. Bots that drive revenue

Chatbots can proactively alert customers to personalized sales and discount opportunities, engaging visitors and increasing upsells. They can also qualify customers and book product demos.

3. Bots that increase customer satisfaction and retention

Since chatbots can handle a virtually unlimited amount of transactions, customers no longer need to wait in line just to get a simple question answered. Instead of waiting to connect to an agent, customers get a quicker resolution from their chatbot, on their terms. Quicker answers mean happier customers, and consistently happy customers mean higher customer retention.

Depending on your corporate goals, you may find that you need multiple bots with different responses, interfaces, and functionality.

Lastly, determine the needs of other departments in your organizations before building a bot to ensure a cohesive strategy. You don't want the bot to be working in a silo.

Consider this

Finalize your goals before you shop around for a chatbot vendor. Once you've consulted with other departments and articulated your use case(s), it will be a lot easier to find one that fits your needs.

What type of bot do I need?

Depending on your use case, the bot's scripts, functions, and even relationships with your agents will vary. Chatbots come in many different flavors – from text to button, from keyword to AI-powered language recognition. Each type has its own unique set of capabilities. You need to understand their differences before you start building your bot.

Start by establishing some must-haves. Does your chatbot need to answer a specific set of queries, or does it need to be open to a broader range? Does it need to be able to provide content to the customer (e.g. images, article links, videos, product reviews)? Does it require access to dynamic information (e.g. product database, current exchange rates, daily weather forecasts)?

There are basically two ways for your customers to interact with a chatbot:

1. **Typing**: Letting customers interact with your bot through their own words gives them freedom to phrase questions in different ways. But it's give-and-take; this more 'open' interface may feel more natural to the customer, but it requires a lot more training and maintenance by you.

2. **Buttons**: This interface lets you control the scope of your bot experience. Customers are limited to pre-defined choices along a fully mapped out 'decision tree', clicking on buttons instead of typing to get the answer they seek. The trade-off here: a safer and more controlled experience for you, but a narrower range of capabilities for your customers.

If you want your customers to be able to interact through typing as they would with a human agent, then you now have to choose between two basic types of language interface:

1. **Keyword**: These chatbots can be programmed to provide readily accessible answers to straightforward questions. This type of language bot identifies preprogrammed keywords or phrases used by your visitors, and serves up the associated responses.

2. **Natural Language Processing (NLP)**: Thanks to their ability to identify customer intent and to learn from their conversations, these chatbots offer the most natural interface for your customers. Their use of AI equips them to handle the broadest range of questions with less programming and maintenance.

Note that both text and button-based bots can integrate with other systems in your customer experience tech stack, so it really comes down to your desired scope and preferred type of interaction. You may end up with a healthy mix of all types of bots.

Consider this

Ask your chatbot vendor what types of bots they offer, and which would be best for your use case. Ideally, find a vendor that offers all types of bots that can meet your requirements, rather than selling you something too advanced, or not advanced enough.

How do I build the bot?

Now you're ready to start building your bot. Different chatbot vendors will have different approaches: some will do all the work for you, while others will hand you the keys so you can do it yourself. Some vendors will offer both options – doing as much or as little of the work as you want them to.

Before getting started, make sure you understand how each vendor loads and maintains bot data (do they have the capability to batch import data?), what the visitor interface is like (keyword or button bot?), and what degree of support the vendor provides (do they have bot templates or quick start guides?). If you're opting for a bot with NLP, you'll want to see how bot training happens, and the tools and services you'll need to maintain it.

When it comes to building and training your bot, your best source of data will come from your chat scripts, knowledge base, and FAQs. Use the questions and answers you already have to accelerate development, but keep in mind that you may need to adjust the language to be more conversational. After all, a chatbot has 'chat' in its name for a reason.

If you don't have a way of tracking frequently asked questions or repeatable agent responses, then you'll want to get your entire team involved by asking for suggestions on what the bot should be able to cover. Your front-line agents are invaluable as they interact directly with customers day in and day out. Ask them which scenarios or questions they think a bot can handle, and which should be escalated to a human.

Note that your agents likely won't be familiar with everything a bot is capable of doing. For example, did you know a bot can use new or returning customer information to respond with more personalized answers? Focus more on which customer engagements can be automated and which require human-to-human interaction for that extra special customer service charm.

Once your bot is built you will need to maintain it. Depending on your use case(s) and the platform you choose, this can be a team effort, or you may find you need to create a new, dedicated role responsible for keeping your bot up to date.
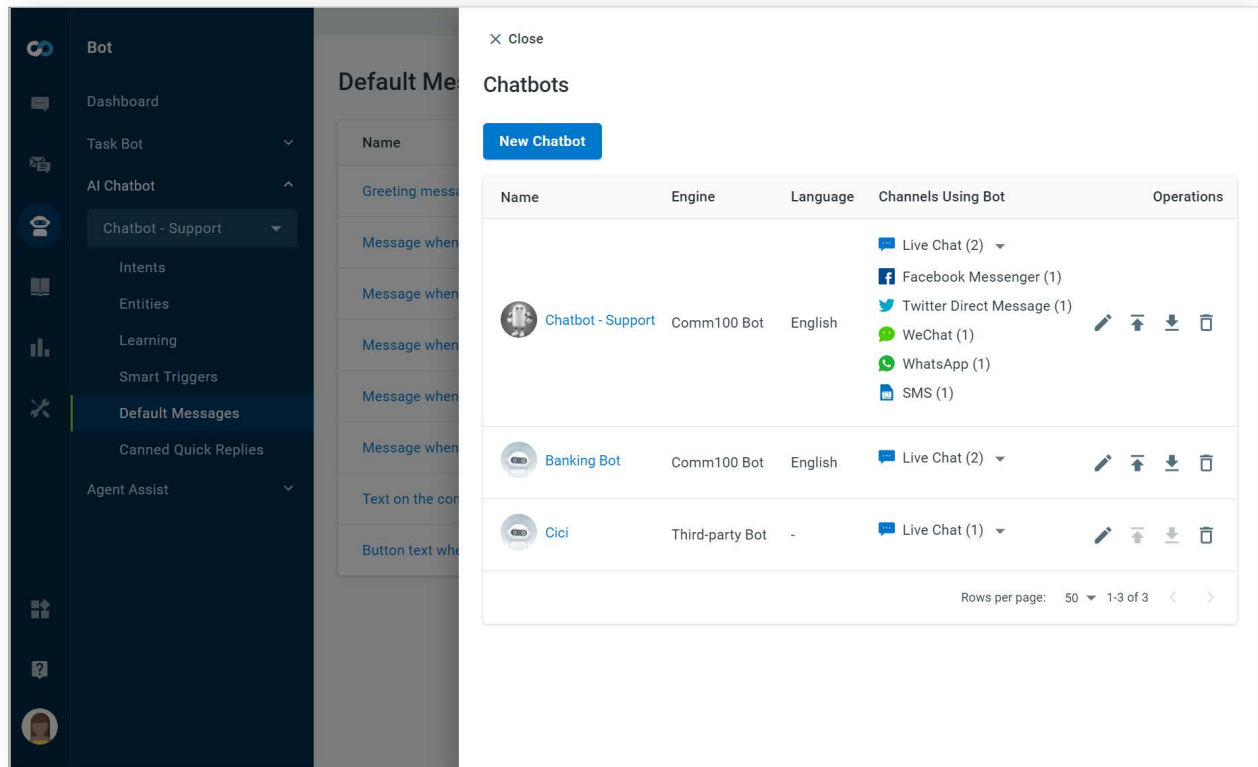
The Comm100 bot platform

Consider this

Scope out how much effort building the bot will require from your team and how much support you'll get from the vendor before, during, and after the bot building process. The ideal chatbot vendor supports you from start to finish, making sure you're set up for success every step of the way.

What platform should I deploy it on?

The goal of your bot will affect not only the type of bot you build but where you deploy it as well. Bots can live on your website, mobile app, knowledge base, different social media channels like Facebook and Twitter, or all of the above.

On one hand, deploying a chatbot on your website allows for a more personalized browsing experience and eliminates the risk of depending on third-party platforms you don't fully control. On the other hand, bots on messaging platforms like Facebook and Twitter can better keep up with customers on apps they are familiar with and may frequent more often.

Depending on your industry and business objectives, you may want to consider deploying bots on multiple channels. For example, those in B2C eCommerce would benefit from having a bot on their website and on different social channels to help field questions like 'how long will it take to ship to [location]', 'what's my tracking number?' or 'what are your seasonal hours?'.

Other industries, like B2B technology, would benefit from having a knowledge base bot to guide users through more technical questions like 'how do I set up [X report] in the analytics suite?' or 'where can I find API documentation?'.

Consider this

Know where your customers are, and which platforms different chatbot vendors support. Look at typical use cases for customers of theirs that resemble yours. For example, some vendors have knowledge base bots, while others don't. Your ideal chatbot vendor offers bots on the platforms you want to reach your customers through.

What integrations do I need?

When building bots, companies often try to create functionality within the bot from scratch. This can result in an unreliable chatbot that doesn't play well with other parts of your technology ecosystem. For example, if your chatbot doesn't integrate with your customer relationship management (CRM) platform, it will create extra work for your team to log information after each interaction.

Wherever possible, leverage the systems that your company already has in place. This will give your bot greater functionality, enable it to be more personalized, and make it more useful overall. Through the right integrations, you can expect less work for agents, a better customer experience, and an overall more efficient workflow.

There are no shortcuts here. One of the biggest chatbot mistakes that businesses make is foregoing integrations and settling for web links instead. An example of this mistake is instead of programming an order form directly into the bot for a seamless user experience, they may instead link to another page with the form on it and divert the visitor away from the chatbot.

When you deflect visitors away from your chatbot through external links, you give up the engagement with the customer that you worked so hard to earn. Your bot becomes nothing more than a navigation tool instead of the friendly, personalized helper it can be. If showing the desired web page in the chat window or programming the order form into the bot is not possible, but necessary for many of your bot interactions, you may want to look for a different bot vendor that offers that capability.

Don't let your bot platform's technical limitations force unreasonable compromises in the pursuit of your goals. The technology is out there to do what you want.

Consider this

Bots are part of a larger ecosystem with multiple external and internal touch points. Ask vendors what type of integrations they offer out-of-the-box, what needs to be custom-built, and what simply isn't possible. Then push them to meet your needs.

How will bots and agents interact?

What do most chatbot fails have in common? A never-ending conversation with the customer who wants, but is unable to reach, an agent. Eighty-six percent of customers believe that they should always have the option to transfer to a live agent when dealing with a chatbot.

It's best to ensure your bot vendor has an accessible "Chat wih Agent" option in the chat window. Even if it's after hours, it's better for your customers to be able to leave a message than to be left hanging and frustrated.

When a customer does ask to speak to a human, the bot needs to be able to transfer the conversation and chat history to an agent, in real-time. Some bots transfer customers by initiating a brand-new chat with an agent, but that means the customer has to repeat themselves to somebody new. This is one of the single largest customer complaints about contact centers. It is avoidable!

There are also situations where you will want the customer to bypass the bot completely. For example, you may have VIP customers or prospects who you never want routed to a bot. Or perhaps there are some pages on your website that indicate strong purchase intent, so chats from these pages should go right to your sales team. Your bot platform needs to accommodate these situations and connect these customers directly to a human agent to optimize success.

If your chatbot only takes over after hours, be sure to let customers know what times they will be able to speak to a representative, or how long it'll be before they receive a response to their message.

Finally, don't forget about your agents! While you might think chatbots are for customers, they can also be used to support agents. Agent-facing bots can supply agents with the customer's profile and suggest answers based on how the chat is going. For example, if a customer is looking for information on a feature, the bot can instantly supply the agent with a relevant link to share with the customer, saving the agent from searching manually for the link.

Some agents might have the perception that a chatbot will eventually replace them, approaching a chatbot project with trepidation or even fear. Because of this, it's vital to

demystify and clearly communicate the chatbot's goals to your team. It's useful to explain that there will always be many queries that chatbots can't handle so your human agents will always be a critical part of your service. It can also be helpful to explain that your chatbot should take away repetitive questions, leaving your agents with more time to handle more interesting queries.

Consider this

Ask the vendor about their best practices for bot-to-human escalation and what options they have to implement a human 'safety net' for the bot to fall back on when your customers have more complex queries or needs. Also, consider how you want to treat different customer types. If you wish to offer different service levels under certain situations, your bot will need to accommodate that.

How do I test it before I go live?

Chatbots are no different than any other technology: you should never go live without thorough testing. If a bot gets deployed before it's fully ready, it may result in a big (and sometimes very public) failure.

Testing the bot is vital to finding bugs or improvements you may not have thought of before. This will help you work out the kinks before it reaches customers. Some of the components that you should be testing include the flow of conversations; identifying dead ends; ensuring menu options are complete; conversational loops are intact, and spelling and grammatical errors are weeded out.

More than half of all chats come from mobile devices, so don't forget to test that your chatbot is optimized for mobile. Make sure to include both Apple and Android devices, as well as different sized screens (like tablets) in your test.

Test it with your internal team first. This will help you catch where conversation flow is breaking. Then extend beyond your team to the rest of your department, then company-wide when it makes sense. Only after that should you start controlled field testing, gradually expanding access to your bot as you gain confidence in its abilities. Slow and steady wins the race, as we reveal in the next question.

Consider this

See if your chatbot vendor offers a sandbox environment where you can test your bot in a controlled way. Understand what their level of involvement will be during the testing phase. Ideally, your chatbot vendor should help you test the bot rather than leave you to your own devices.
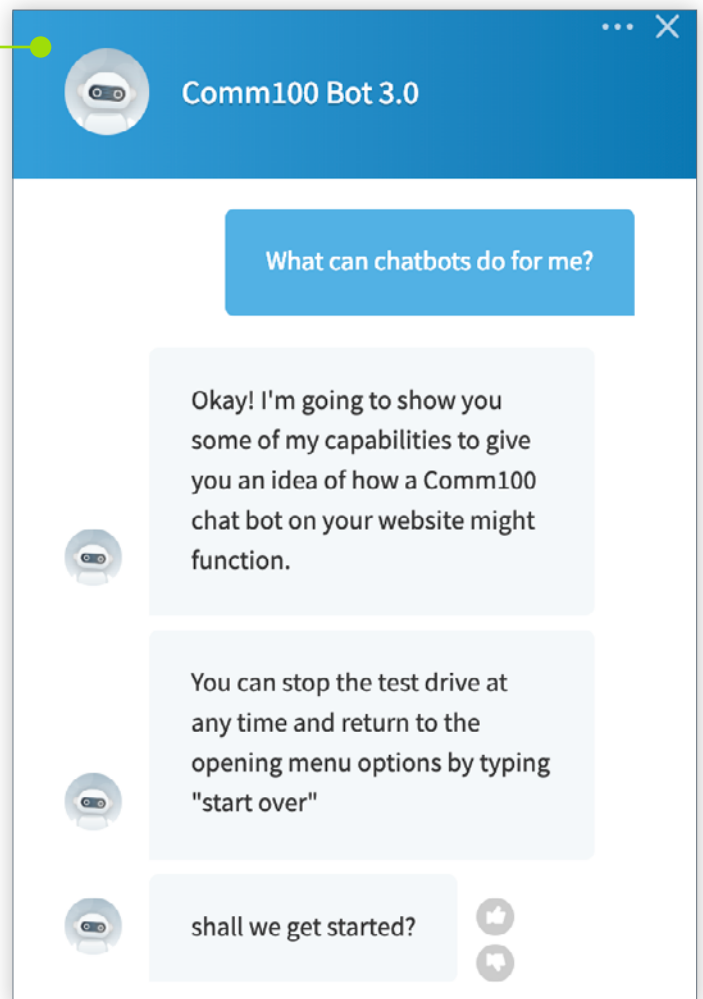
How do I launch the bot?

Start slowly to mitigate risk. For example, deploy your bot on a few less-trafficked pages first and monitor its progress. Gradually tune it and make any necessary adjustments based on real-world experience before extending it to pages with more activity.

Manage your customer's expectations, especially when deploying a bot for the first time. Including a message like "I'm still learning, but I can help you with X, Y, Z" alongside the bot's regular greeting will let users know what the bot is currently capable of. Setting these expectations upfront will reduce frustration later on.

Chatbots should be designed for possible misunderstandings. Set specific error messages just in case these misunderstandings happen (and they will!) to get the user back on track without starting at the beginning. Give your customers the option (and easy instructions on how) to start over or return to the main menu.

Program your chatbot to deal proactively with any ambiguities and misunderstandings. If your chatbot detects various keywords and is unsure of a response, have the bot clarify with your customer before offering them an answer.

Comm100 Bot 3.0

What can chatbots do for me?

Okay! I'm going to show you some of my capabilities to give you an idea of how a Comm100 chat bot on your website might function.

You can stop the test drive at any time and return to the opening menu options by typing "start over"

shall we get started?

As seen in this example, while KB is short for Knowledge Base, this bot hasn't been programmed to recognize the acronym. The related questions it offers are still relevant and are a great way to adapt and suggest a possible next step. This way, visitors will have other questions to choose from.

Conversations aren't linear. Allow space for users to change their mind, ask another question, or switch from a serious conversation to small talk. Make your chatbot flexible; prepare it to deal with interruptions.

When you're ready to launch externally, remember to tell your customers about it! It's not always a case of 'if you build it, they will come'. Let your customers know you have a bot through your usual methods of mass communication such as an email campaign, a newsletter, a 'What's New' video, or through social media.

Comm100 Bot 3.0

what are the benefits of kb?

I don't quite understand the question. I found some topics which I think might be similar:

1. Upgrade to new Knowledge Base product

2. How a Knowledge Base can improve Customer Experience

3. Why you should offer self-serve customer service through a Knowledge Base

Type a message here
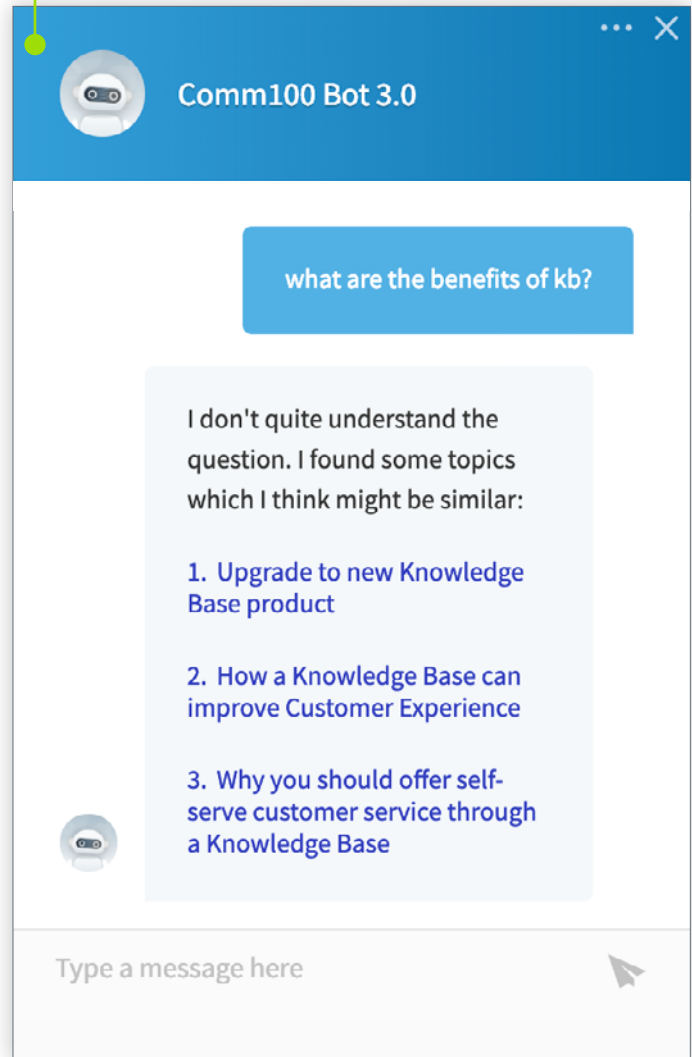
Consider this

Your vendor should be able to advise you on how best to take the training wheels off your bot. You're likely not their first customer, so don't be shy about asking for their guidance.

How will I measure success?

If you've clearly aligned your chatbot to your business objectives, then you should be able to prove how your bot is contributing towards your goals. Many people in your organization will be watching your bot, perhaps questioning the value of the investment, and wondering what impact it will have on customer satisfaction. You can best demonstrate impact by measuring against business outcomes.

It's important to know that it's unrealistic for your human agents and your chatbot to be held to the same standard when it comes to key performance indicators (KPIs). For example, chatbots can – and should – respond instantly. Unlike humans, they don't need to take the time to think or type out an answer, so their success shouldn't be measured on time-based KPIs.

Select the KPIs you want to track according to your chatbot goals and adjust the bot accordingly. For example, if you have a support bot, track its customer satisfaction ratings to test its effectiveness and improve its responses. If you have a sales bot, measure its conversions and impact on shopping cart value.

Map your bot's KPIs to the core business outcomes you identified in question 2. For example:

If your goal was to improve customer experience, consider measuring:

- Post-chat ratings for bot

- Changes to wait times and queue after bot launch

- Changes to agent ratings (compared to percentage of chats involving bot)

If your goal was to offer 24/7 service, consider measuring:

- Changes to volume of offline messages

If your goal was to improve sales, consider measuring:

- Dollars or percentage of sales initiated or completed by bot

- Number of conversions from bot

If your goal was to increase business efficiencies, consider measuring:

- Percentage of chats involving your bot

- Percentage of chats completed by your bot

- Percentage of bot conversations transferred to agents

Consider this

When selecting a chatbot vendor, understand what kind of reporting and analytics they offer. Ask what their out-of-the-box reports look like, determine if they align with what you need to measure the success of your bot in relation to your business goals, and if not, ask the vendor if they can offer custom reports, personalized to your instance.

What happens next?

When introducing any new technology to your customer experience strategy, there will likely be some bumps along the way. Once your chatbot has gone live, review its transcripts and continue editing it for accuracy and coherency; there will almost certainly be responses that need tweaking. These may be easily-answered questions that you forgot to include, answers that could be shortened, or ones that need more detail.

Give customers the option to rate how helpful the bot was to help you learn what is working and what isn't. Go back and look at the answers that were low-confidence or unrecognized by the bot and make improvements for next time. The important thing to recognize is that going live isn't the end, it's just the end of the beginning – you'll be continuously improving your chatbot as you go.

With time, your bot will only get smarter and more capable of assisting customers. By regularly going over your chatbot's chat log and listening to customer feedback, you can make changes to your bot and gain experience that only comes with trial and error.

Remember to look forward! While chatbots are starting to go mainstream, the technology will continue to evolve. A sacrifice you may have made today will be a real possibility tomorrow, so dream big and test new capabilities often.

Consider this

Find out how much support the vendor offers after bot deployment. Set up cadence calls to review performance, and ask what their product roadmap for chatbot looks like for the future, what upgrades they're planning, and how you can incorporate that into your bot.

The Wrap-up

Chatbots offer a range of benefits to your business, your customers, and your agents. They're always on, they're fast, and they don't ever get tired of answering the same question over and over again. Bots can accomplish tasks without supervision, consistently and efficiently. And they can capture feedback and generate a wealth of data that can be used to improve your business.

Like any new technology investment, perfecting a chatbot takes time, patience, and a well thought-out strategy. You may not yet have the vision or infrastructure to take full advantage of a chatbot just yet, but this step-by-step checklist will get you there – and a good vendor will help you every step of the way. By answering the above questions to develop your strategy, you'll be on your way to greater business efficiencies, happier customers, and more productive agents!

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Let's chat

Comm100 is a leading global provider of omnichannel customer experience solutions with a mission to make online service and support delivery more genuine, more personalized, and more productive through meaningful conversations. Let us show you how.

Learn more