



inbenta GUIDE

Guide

how can bots really strengthen your omnichannel strategy?

Which 'bot' approach for your omnichannel strategy?

What are the key milestones and best practices?

Focus on some case studies and users' feedback.

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Introduction : a world of multi-channel interaction

5

According to Gartner,
**5 channels will be used
on average in 2025,
including the bot.**

72%

**of customers prefer
to solve their problem
themselves rather
than calling Customer
Service.**

(source : Salesforce)

45 Billions

**The market for bots will
be worth \$4.5 billion
in 2021.**

(Source : Opus Research)

Digital contacts with companies are multiplying, whether they come from outside the business (clients, prospects, etc) or from within the company itself (employees, etc). **Channels, devices, sources are more and more diversified.**

Channels, level of information sought out, responsiveness, expectations are diverse. Companies' responses to each use case must be adapted while ensuring the continuity of the user's journey. Consistency and consolidation of the information between channels is also essential: a prospect or customer on a given journey might interact for a different need in the future.

But really, what is a bot?

A bot is a computer application that aims to **simulate a human discussion**, such as a written conversation in the case of a chatbot. It also has other names: conversational agent, virtual assistant, etc...

Chatbots placed on a website are a common thing by now, but the evolution of interactions coupled with technological innovations have resulted in the creation of **bots on all communication channels**: social networks, email, voice, phone...

As an example, the development of vocalization (voice recognition and speech synthesis) made it possible to connect chatbots to IVS (Interactive Voice Servers). These are callbots! With long text analysis, mailbots can now automatically process some emails. **As a consequence, there are more and more channels on which bots can be implemented.** The bot market is not homogeneous: it is entering a phase of mastery on some channels but still needs to be evangelized on others.

The dynamic is real, on communication channels where bot is mature or on channels where adoption of **the technology is still underway**. This structural movement will position the bot as a key way of interacting with all stakeholders: prospects, customers, employees, partners...

Like any innovation with a strong potential, bots are at the crossroads of complex topics: multiple communication channels, language comprehension, taking into account customers' journey...

“

*It is important to take a step back in order
to fully grasp the subject and take full
advantage of its potential.*



Taking a step back from multi-channel, cross-channel and omnichannel concepts

The variety of channels used by bots matches **the users' behaviors, whose points of contact vary according to their usage**, expectations and profiles. For example:

- ✓ **Millenials** prefer using social medias and smartphone messaging solutions (e.g. WhatsApp, Facebook Messenger).
- ✓ **Generation Y** prefers email contacts and then messaging applications.

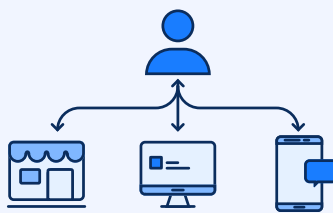
- ✓ **Generation X** directly promotes contact by phone.

Those behavior differences according to users profile are multiplied by the variety of usage: consumption, reinsurance, self-service... This evolution makes it necessary to study the use of bots with regard to the concepts of multi-channel, cross-channel and omnichannel.



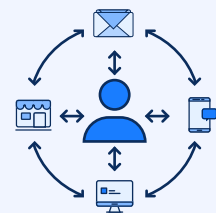
Multi-channel

The multi-channel approach offers different entry points in order to adapt to users who switch channels depending on the time of day, need, consumption times... **These contact points act independently of each other.**



Cross-channel

The cross-channel approach supports the succession of stages in the user's journey by allowing information to be retrieved and the user to be tracked through various channels. However, **the customer experience is perfectible** and the consistency of responses varies.



Omnichannel

The omnichannel approach ensures a complete synergy between the different channels. All information is consolidated and synchronized. **The customer no longer needs to give the context:** the company can adapt the answers and the way the user gets the information.

The customer or employee experience is now omnichannel. As bots simulate a human interlocutor, users expect continuity in the discussion. **Your omnichannel strategy must therefore reflect at the bots' level and make use of them.** Inbenta's omnibot is the answer to this new paradigm.

Voicebot, mailbot, chatbot, callbot, Messenger bot: which bot for which channel?

Bots are becoming more and more personalized, even personified. This personification needs to be translated in a transparent way on the company various channels.

However, integrating bots into an omnichannel strategy requires a **good understanding of the different types of virtual assistants available and their use cases.**

Focus on the web chatbot

Also known as a conversational agent, I am the oldest of the bots! I simulate a written conversation in natural language on a chat or conversational channel.

My advantages: my return on investment no longer needs to be proven!

My must-haves: instantaneity, responsive design, contextualization...

Must keep in mind: I can deploy additional features through webhooks & APIs.

My preferred uses: conversion and reinsurance on e-commerce sites, customer-care, internal HR support, etc.

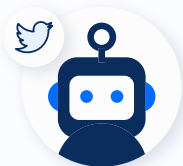
My favourite audience: everyone who's at ease with digital technology.



Using more sophisticated chatbots, customer requests can be answered up to 40% faster, saving up to 30% in costs.

(source : citizen call, 2018, susan hash contact center pipeline, 2017, natixis, 2018)

Focus on the socialbot & messenger bot



65%

of users prefer to use a messaging application to contact a company.

(source : chatbotsmagazine.com)

Quite similar to the chatbot, I am specifically deployed on social medias such as Facebook and Twitter. My textbook case at the moment is the Messenger Bot on Facebook.

My advantages: simple and fluid experience, short and persistent conversations.

My must-haves: instantaneity, language adapted to the audience, personality, etc.

Must keep in mind: the technical restrictions specific to each social network, the constraints related to personal data.

My preferred uses: brand image.

My favourite audience: millennials.

Focus on the mailbot

I analyze the content of requests made by email in order to qualify them, or even answer them automatically. Previously, my name was used to refer to spam robots, but times change! I am one of the only bots for whom instantaneity is not required.

My advantages: better quality of service, reduced response time, automated responses to simple and recurring emails

My must-haves: the ability to understand longer texts, feeling analysis, etc.

Must keep in mind: the increased 'noise' with the volume of content, the semi-instantaneous conversation.

My preferred uses: support and customer service.

My favourite audience: all audiences.

72%

of European companies that use AI see the benefits in terms of time saving for their agents.

(source : Étude Devoteam et ServiceNow)



**Most mobile usage is done via text message exchanges. (...)
The act of exchanging messages allows a greater complicity.**

(source : conversationnel.fr)

Focus on the Text Message Bot

At the crossroads of chatbot and mailbot, I exchange conversational content with my interlocutors via text messaging (SMS for 'Short Message Service').

My specificity: no need for an internet connection! Not to mention that I can take the contact initiative.

My advantages: commitment without the need for a messaging application, direct link, initial contact, etc.

My must-haves: adapting to the channel (GIFs...), identifying the right moment.

Must keep in mind: consolidation of information, declining usage.

My preferred uses: customer relations, loyalty, promotion, etc.

My favourite audience: consumers.



58.6%

of online U.S. adults say they have used voice search.

(Source : voicebot voice assistant seo report)

Focus on the **voicebot**

I am a conversational bot that talks to users through voice. Although I am one of the newest bots, I have a great future ahead of me with the development of voice assistants!

My advantages: proximity to customers via PDAs, ease of use and accessibility, differentiation, etc.

My must-haves: speech recognition, speech synthesis.

Must keep in mind: oral language analysis, integration with platforms, personal data.

My preferred uses: brand image, direct ordering customer service.

My favourite audience: young generations, people with reading and writing difficulties.

Focus on the **callbot**

Similar to the voicebot, I am dedicated to the phone channel. I am taking over from the Interactive Voice Response (IVR) by bringing a real conversation logic that transforms the user's experience.

My advantages: efficiency of the human advisors, customer support workload ramp-up, reduced waiting times...

My must-haves: speech recognition, speech synthesis, instantaneity, integration with IVR.

Must keep in mind: escalation to a consultant, connection with third party IS, management of disconnected conversations, etc.

My preferred uses: selfcare.

My favourite audience: Generation X, people with reading and writing difficulties



Despite what's being said, the telephone remains the number 1 channel for contacting a company, with 57% of interactions (just ahead of email and web forms).

(source : customer service of the year 2018)

Comparative table of the different bots per channel



Chatbot

Technological maturity



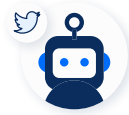
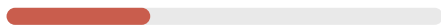
Usage maturity



Ease of implementation



Real innovation or simple upgrade?



Socialbot

Technological maturity



Usage maturity



Ease of implementation



Real innovation or simple upgrade?

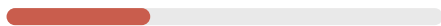


Mailbot

Technological maturity



Usage maturity



Ease of implementation



Real innovation or simple upgrade?



SMSbot

Technological maturity



Usage maturity



Ease of implementation



Real innovation or simple upgrade?



Voicebot

Technological maturity



Usage maturity



Ease of implementation



Real innovation or simple upgrade?

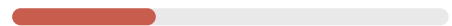


Callbot

Technological maturity



Usage maturity



Ease of implementation



Real innovation or simple upgrade?



While the bot maturity is linked to technological advances, it is not a purely technical product. It must be seen as a communication channel in its own right.

From multiple bots to the omnibot: steps needed

Each communication channel can therefore take advantage of a dedicated bot that provides a specific conversation experience.

However, in order to be in line with the omnichannel experience expected by the interlocutor, the user must perceive only one bot, which knows him, whatever channel he's using.

Thus, the omnichannel strategy must be declined as an "omnibot strategy"! That is to say, bots that ensure a

seamless journey, keeping the users context and **offering a suitable conversation experience** across all the entry points of your multi-channel system.

This omnibot strategy also supports the pooling and comprehensiveness of the knowledge base, while rationalizing investments. The work of the **Botmaster** gets simplified whereas optimizations and analyses become much more efficient.

The omnibot: an iterative approach

01.

The first bot

No need to try to setup bots on all your channels at the same time. It's best to go iteratively and start with your most needed channel. Beyond the interface, work needs to be **focused on the knowledge base, lexicon and semantic analysis**, thus building a **solid foundation for your omnibot strategy**.

02.

A new bot = a new floor

The set up of a second bot on another channel **builds on the first bot's knowledge base**. Obviously, each channel has its own constraints: the substance of the message in the knowledge base is the same, but the format needs to be adapted.

At the same time, this unique knowledge base has to be **continuously optimized thanks to users' feedback**. It is when confronted with real questions that it will gain in relevance and value for the benefit of all your future bots!

03.

Each iteration reinforces the whole system

As new bots are added, the knowledge base keeps on growing and improving. The continuous optimization of the different operating bots and the tracking of KPIs are mutualized. Responses are consistent between the different channels.

Beyond this coherence, proposing a real synergy whatever the bot, also requires consolidating the **'state of the conversation'** between the different platforms. The goal is to ensure the **persistence of the conversation** at different times regardless of the channel.



We must never lose sight of the fact that we're creating channels for prospects, not channels for bots.

A few tips to stay on course!

- 01.** **Creating an intelligent journey is based above all on customer knowledge.** The contact points are at the crossroads of the customer journey and the channels, i.e. the bots.
- 02.** Practices are evolving, and there is a **period of adjustment from the users point of view**. We must therefore be realistic in the way users interact with bots and know how to adapt.
- 03.** **The pooling of information must be taken into account as soon as possible.** It is also necessary to anticipate that it can sometimes be complex between some channels (lack of standardisation, diversity of platforms, etc).
- 04.** **User identification and authentication** are essential to resume a conversation at the right time... without releasing critical data to the wrong person!
- 05.** **Graphic consistency** between all the interfaces obviously contributes to the continuity of the journey.
- 06.** **Time persistence between channels is a challenge.** The first technological bricks already exist, but let's be realistic, there is still a long way to go!

Not all bots are affected by all usages

It is by understanding your customers, employees and/or prospects' journeys that you can identify the most suitable channels and the bots to be deployed.

Example of a typical consumer journey in the **banking sector**

Mr Smith loses his credit card. He notifies his bank in the morning via a chatbot and reports his lost credit card. Just before mid-day, his bank gets in touch via a Text Message Bot to ask if he wants to order a new card. He answers that he'd like to do so. Later, Mr. Smith wants to know if he will have to change his PIN number, so he calls his bank and talk with a callbot that reassures him: he will be able to keep the same PIN number.

Example of a typical consumer journey in the **e-commerce sector**

Mrs. Smith visits an e-commerce website in the morning to order a product, but she's worried about the warranty. After a chatbot reassures her, she adds the product to her shopping cart but doesn't finalise her purchase. At noon, she receives a message on a Bot Messenger that provides her with additional information on that product. Mrs. Smith then validates her order. In the evening, Mrs. Smith calls the support service to enquire about the delivery timeframe and a callbot answers her questions. However, as a concern has been identified, the callbot escalates to a human advisor in order to avoid a possible cancellation.

The iceberg that is the omnibot

The success of your omnichannel strategy requires you to **take a step back from the bot as an interface**, and identify all the necessary architecture and **technological building blocks**.

As for a human, interfaces (eyes, ears, mouth...) are nothing without intelligence (the brain)! One should not be seduced only by the most visible facet!

Bidirectional voice-to-text transfer: STT (Speech-To-Text) allows the voice bot to interact with the engine that analyzes questions in 'text' format, and TTS (Text-To-Speech) allows to vocalize the contents of the knowledge base.

Interface



Conversation interfaces are available per channel. The main issue is ergonomics as well as the sound of the voice in the case of a voicebot or callbot.

Technological engine

Using automatic Natural Language Processing technology (NLP), the engine analyzes user formulations and parses them into elementary units.



Comprehension
The NLP



Meaning
The Lexicon

The Lexicon ensures the understanding of the meaning according to the language, the sector of activity and the company. The aim is to grasp the meaning rather than the words.

Knowledge base

The Dialog Manager orchestrates the conversation flow according to the user experience and the context.



The journey



The appropriate answer



L'optimization

The knowledge base groups together question and answer content by pairs. It also declines the answer according to the profile of the interface in order to adapt to the channel used.

Third-Party Tools



CRM



Extranet



Ordering

Integration with third-party tools ensures synergy between all customer interaction points, including physical ones. It also allows actions to be carried out according to the requests received.

The humans, behind the bot

At Inbenta, we are convinced that while technology has an important role to play, people are at the heart of successful bots projects!



The advisor

The bot doesn't answer all the questions. It is above all an additional support that integrates into a team. It **relieves advisors from routine work**.

For complex requests, escalation to the advisor provides answers with better added-value.



The Botmaster

The Botmaster supervises bots, customer satisfaction, performance, knowledge base optimization... His responsibilities are linked to the success of the project and the editorial component. **He is the project leader and is ultimately autonomous from the Linguist on Lexicon work.**



The Linguist

Linguists manage the intelligence of language comprehension especially in R&D. They intervene on the **semantic** facet, lexical resources and on the improvement of the **knowledge base** so that it is adjusted to real uses.

Anticipate new channels and be reactive to differentiate yourself

With the development of Artificial Intelligence, new bots will continue to appear and the **Human Bot** is most probably the next step moving forward.

Building your bot strategy on a solid foundation and continuously improving it ensures that you can **integrate these new channels faster, at a lower cost** and with a powerful knowledge base.



inbenta

Inbenta is a global leader in a new class of enterprise AI and semantic search technology for e-commerce and customer support.

Powered by natural language processing, Inbenta's products are used by over 250 companies to drastically boost self-service, enhance customer experience, increase conversions, and cut down on support costs by helping customers find exactly what they need.

Inbenta specializes in conversational chatbots, virtual assistants, e-commerce search, support ticketing, hybrid chat, and knowledge management.



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