

Building a successful chatbot: tips and best practices

Introduction

Chatbots, aka "conversational agents" or "virtual assistants", are increasingly gaining media attention. Heightened user interest due to the perceived use of Artificial Intelligence (AI) and Machine Learning means that it's no longer surprising to find a chatbot on any given website.

Business from all sectors including e-commerce, banking, insurance, industry, and telecommunications are adding chatbots to their future plans.

Nevertheless, IT, digital transformation, and marketing departments are learning that **a chatbot is not merely a "plug & play" product. It's a new communication channel!**

As awareness spreads, the chatbot market is entering a new phase with chatbot projects rich in useful features. To be successful, projects must be organized and monitored by specific internal and external teams using clear methods and objectives.

This organization and these good practices are precisely what we will study in this expert opinion.



Those who see the chatbot project as a purely technological project are mistaken. It is not just a tool, it's a real communication channel!



The core of chatbot projects: co-creating value between you and the service provider

A chatbot project's success is not based solely on the interface. It depends above all on the ability to combine your expertise and the provider's feedback with a natural language solution and an adequate knowledge base.

So, what is important is the solution and the knowledge lying behind the chatbot interface. However, these are very heterogeneous according to the providers! This is why budgets, timing and organization of chatbot projects can vary greatly.



A successful telephone conversation depends not only on the device's technology, but also the ability to reach the desired person and the quality of the discussion that follows. It's not a matter of returning to the time-by-phone line.

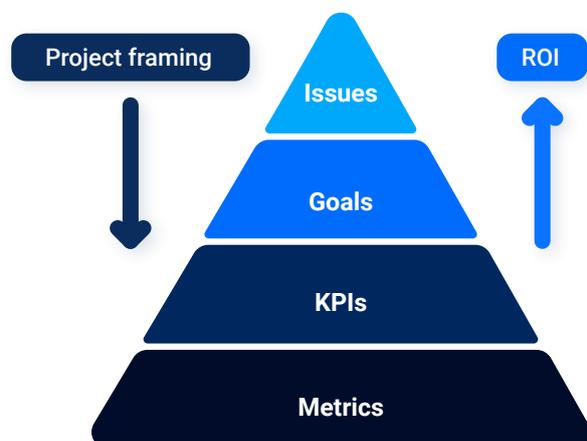


A chatbot project is not a product to buy but a solution that reflects your company's goals. The success of this solution relies on two pillars:

- ✓ **The co-creation between you and the provider**, which is directly related to his expertise and ability to advise you.
- ✓ Unlike other software products, the main challenge is not focused on the technology but on the project framing.

Tip

All framework elements must be aligned and consistent with each other, which is why it's essential to build a "pyramid" from the project objective up to the tools that will measure the project's success. This approach is also essential once the chatbot project is in place to work backwards. Start from field measurements and either fully or partially validate whether initial objectives have been met, and then make the necessary changes.



Tips for effectively framing your chatbot project

The chatbot project's framework is the key to its success. It is based on 5 essential blocks that must be analyzed and accurately defined and about which the provider must advise:

01.

The issue

This is the **cornerstone** that sets the entire project's approach.

02.

Goals

Goals must be **specific, measurable**, and limit the risk of disappointment. Also specify who is driving them to avoid conflicting objectives. Different directions often have a different vision of their responsibilities.

Examples of objectives:

- ✓ **Decrease** the number of calls with a low added value of 30%.
- ✓ **Increase** add-to-cart rate by 25%.
- ✓ **Improve** information retrieval by 10%.
- ✓ **Increase** the time of presence on the website by 20%.

03.

Indicators or KPIs

- ✓ Some KPIs measure objectives and **identify corrective action**. For these KPIs, it is necessary to determine how the encrypted information will be returned from the field and what services and processes are involved. In fact, to judge chatbot ROI and the achievement of project objectives, the KPIs will need to be correlated with traditional indicators (like number of calls, etc.)
- ✓ **KPIs also play a central role in the continuous improvement of the chatbot** for good reason: they illustrate the user experience (self-service rate, bounce rate, average exchange duration, nonresponse rate, etc.).

04.

The project team

- ✓ The **"botmaster"** has a central role in the project. The botmaster performs several functions and can be represented by one or more people: the "botmaster success" who is responsible for the project and the "editorial botmaster" who manages publication material and tracks users' satisfaction with the contents, decision trees, etc.
- ✓ Since chatbot projects are transversal, it is also necessary to **define contacts within each involved department** in order to set up a team capable of making decisions while maintaining the overall project vision (project manager, lawyer, marketing, customer relationship, etc.).

05.

Chatbot scope

- ✓ **"WHERE"**: Where will the chatbot be used (registered space, public space, specific pages ...)? The answers must adapt to the user's topics and perspective (customer / prospect / single visitor ...).
- ✓ **"HOW FAR"**: What actions should be conducted by the chatbot? Should it simply suggest answers or also engage the client and perform simple actions?
- ✓ **"HOW"**: This specifies the language targeted by the chatbot, its customization, how to access it, the supported platforms, any possible differences among the answers based on the user type (ex: professional / individual) ... These different aspects will determine the precision of the chatbot's interactions and knowledge base.

Conclusion

In conclusion, our vision of the chatbot project at Inbenta is based on our conviction that the chatbot is not just a tool; **it is a collaborator in your company.**

✓ **The framing** corresponds to the chatbot's job description, which is essential for it to respond the way we want it to.

✓ **The "Build" phase** is the chatbot's initial training so that it is operational, and up and running.

✓ The follow-up to **the "Run" phase** is the chatbot's continuous training to check its work, but also to ensure that it improves, develops new skills, is more productive and can be upgraded with new topics!

✓ And like any good collaborator it will also exceed your expectations by bringing you a new vision and unprecedented knowledge!



Having a "chatbot master" who is involved in the process, during the set-up and afterwards, is one of the keys to success!



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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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