

eBook



AI Chatbots Implementation Plan

Key considerations and setup steps

March, 2023



Introduction

As the fastest-growing brand communication channel, AI chatbots have set a new bar for the quality of customer interactions. Most widely used for customer service, chatbots are poised to become the primary channel in this department by 2027.

With organisations increasingly prioritising AI chatbot implementation projects, this e-book provides guidance on how to define business outcomes, analyse consumer expectations, and choose the right solution for your needs.

CUSTOMER CARE

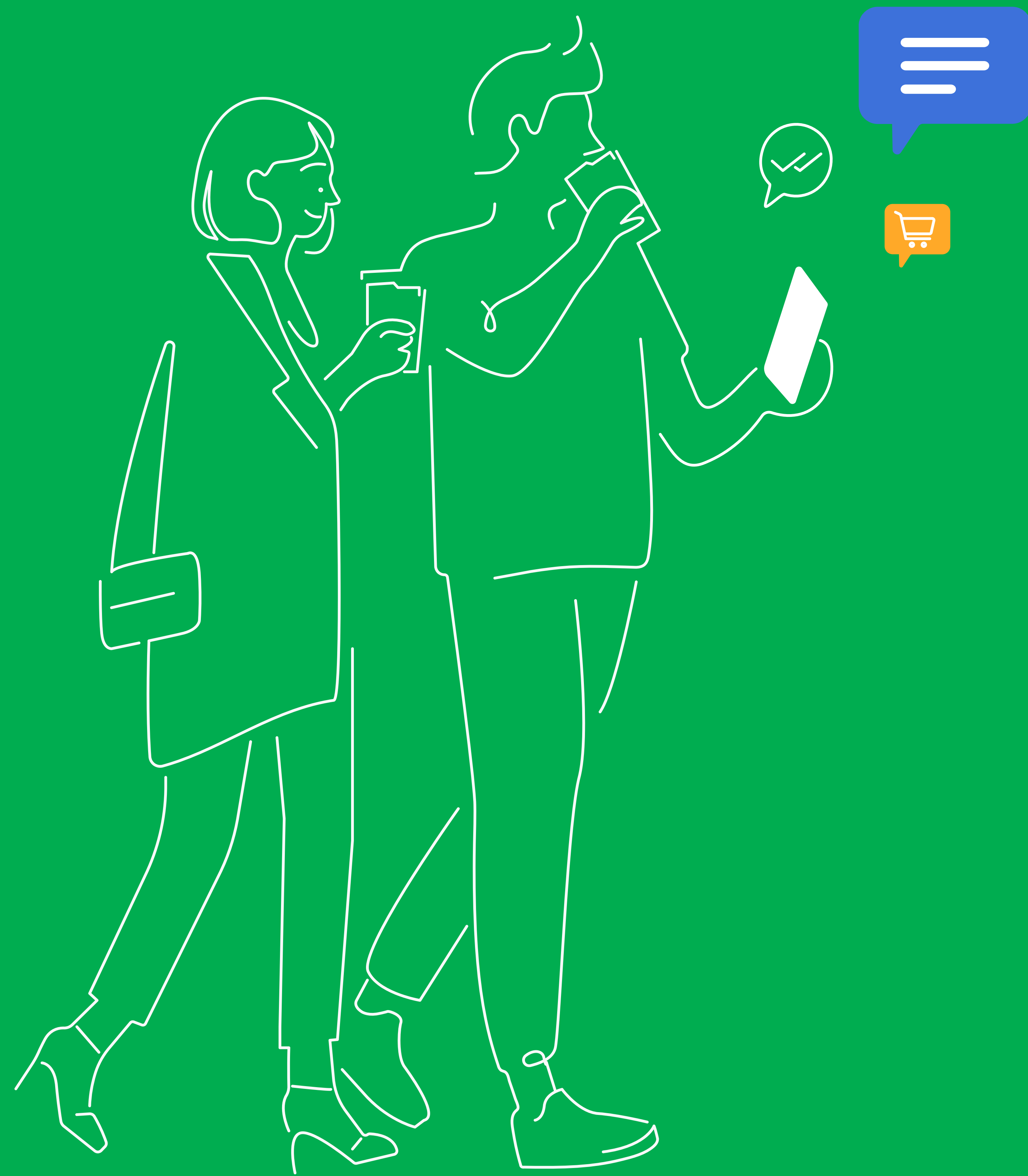
Conversational AI is expected to help reduce contact centre labour costs by \$80 billion by 2026.

HR AND RECRUITMENT

64% of workers said they trust AI chatbots more than they trust their managers.

MARKETING AND SALES

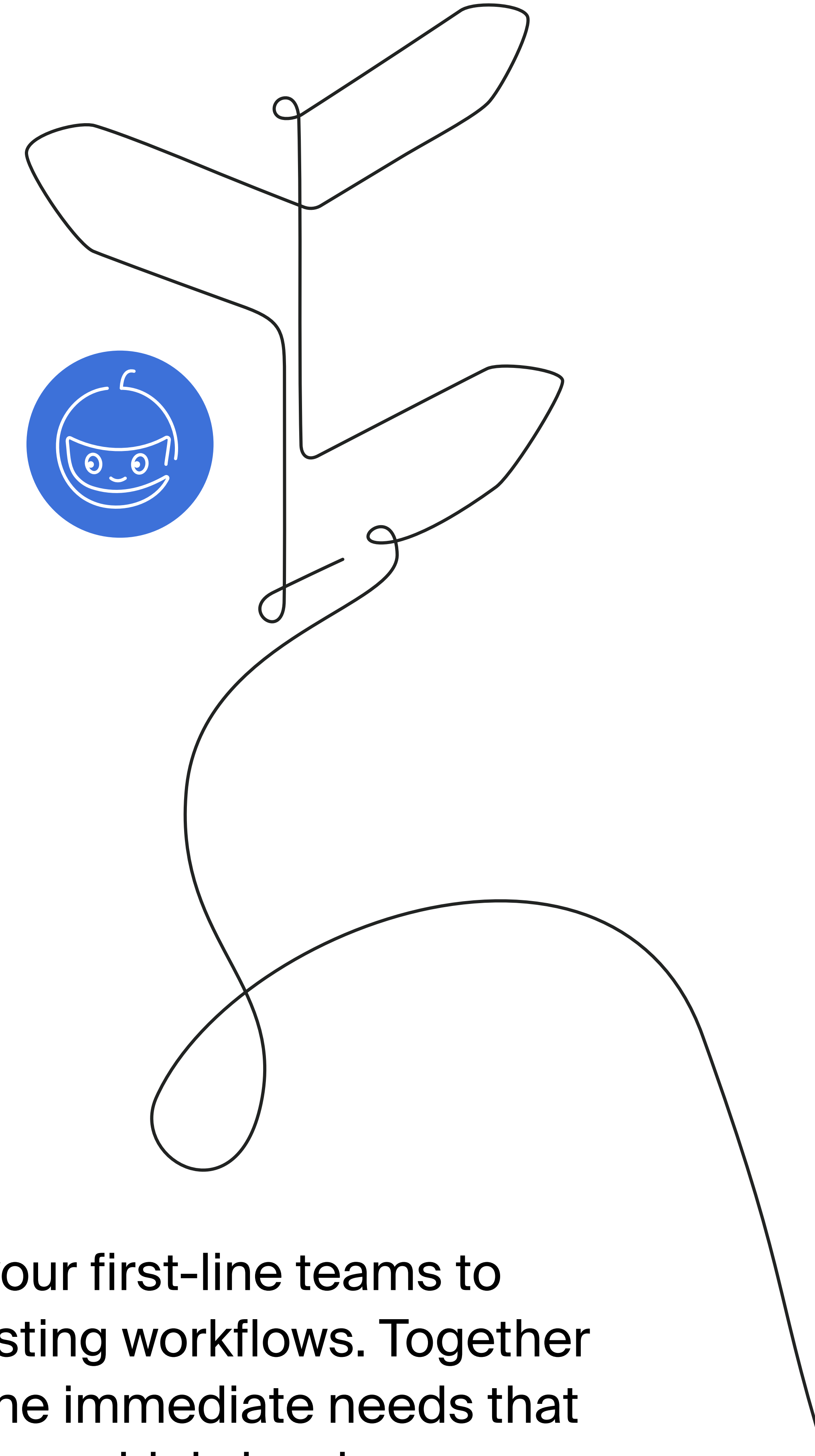
56% of organisations that used a conversational marketing solution saw increased sales productivity.



4 THINGS YOU WILL LEARN IN THIS EBOOK:

- ✓ Why AI Chatbots are the fastest-growing brand communications channel
- ✓ What questions to ask before creating a chatbot strategy
- ✓ What to look for in an AI Chatbots platform
- ✓ How to implement a chatbot solution step by step

1. Define desired business outcomes



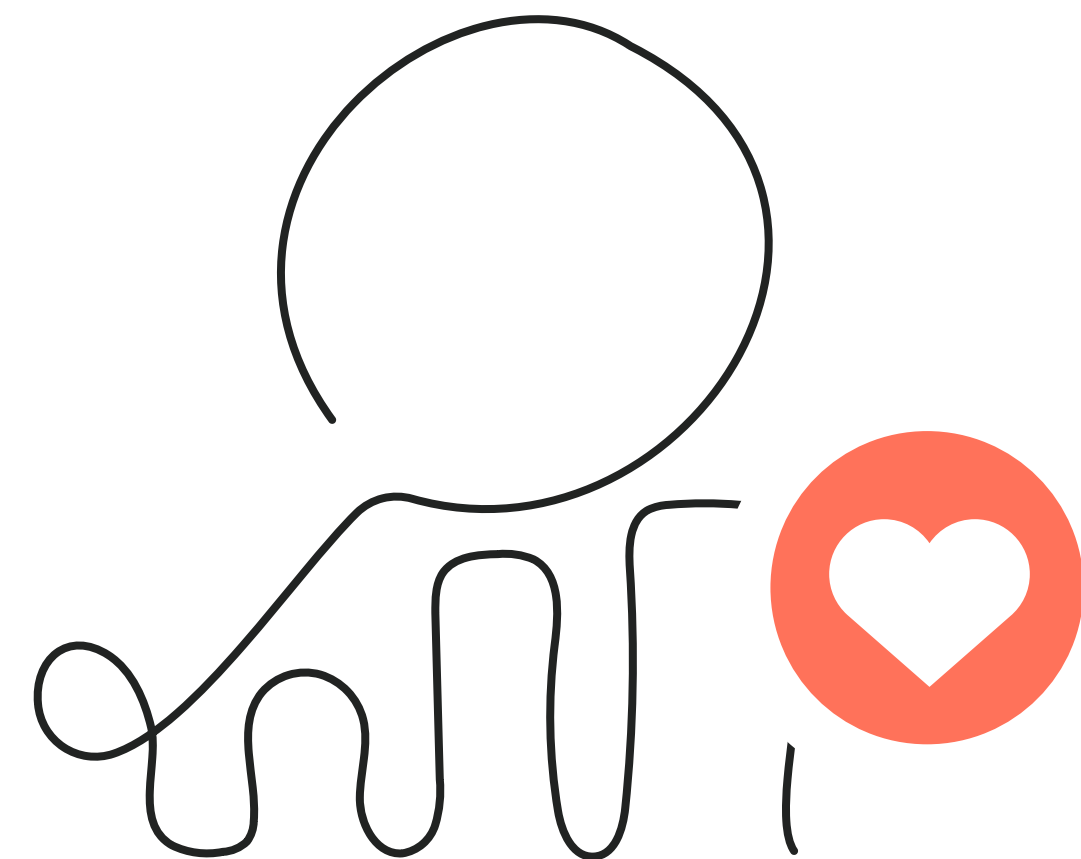
WHY IS THIS IMPORTANT?

Chatbots can only bring positive results if you set clear project goals and expectations. This way you can more efficiently align your teams, communicate project requirements, choose your platform vendor and assess project success.

HOW TO DO IT

Set up a weekly cadence with your first-line teams to discuss bottlenecks in your existing workflows. Together you can identify and prioritise the immediate needs that chatbots can fulfil. Once you have a high-level understanding of the results you want to achieve, set smart goals to better understand the value that you are expecting to get from a chatbot solution.

SAMPLE GOALS



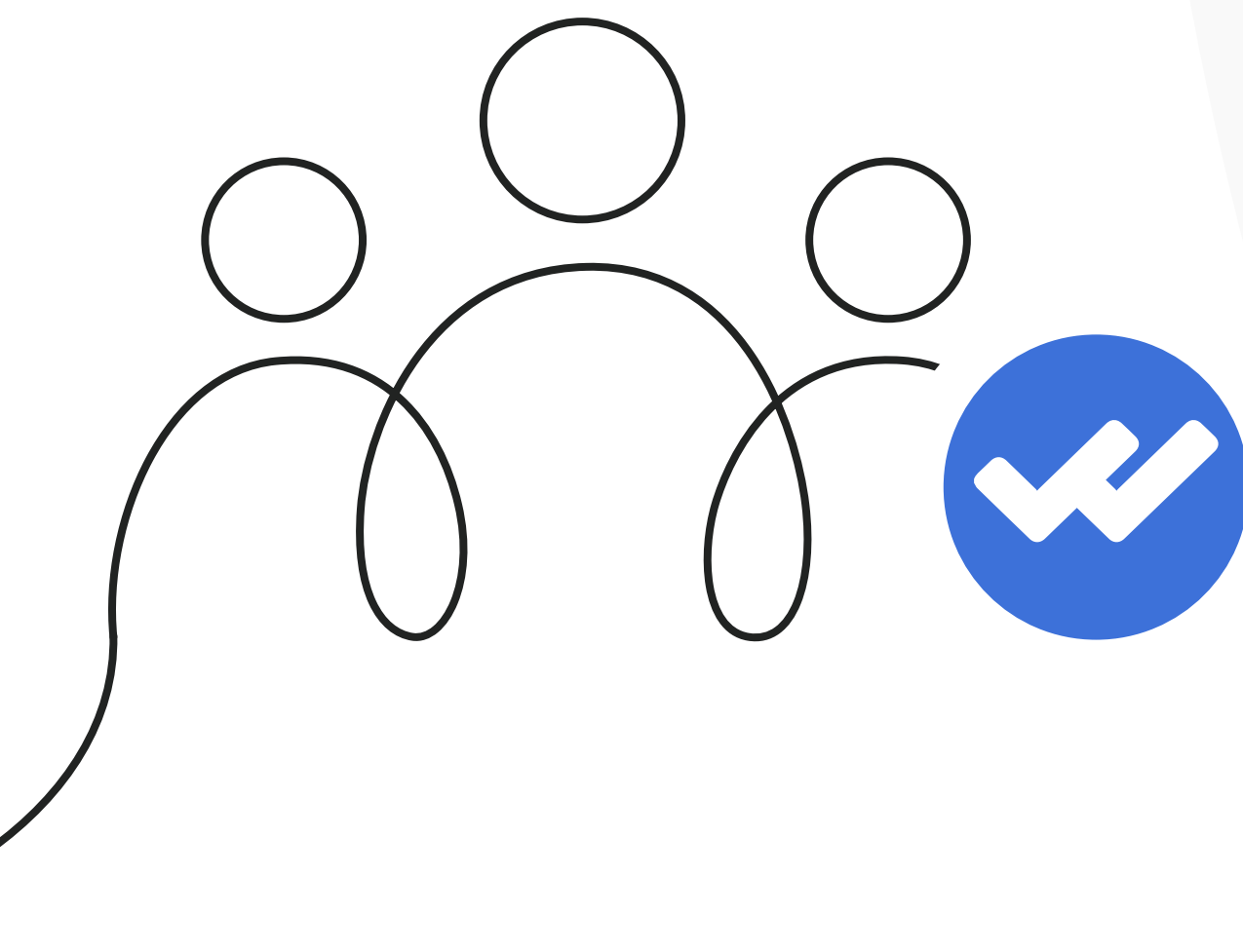
CUSTOMER CARE

- Reduce call centre costs by X% in quarter X.
- Improve customer care efficiency by X% next year.
- Reduce ticket resolution time from XX to XX minutes.



HR AND RECRUITMENT

- Improve HR team efficiency by X%.
- Automate candidate recruitment and onboarding by X%.
- Lift employee engagement by X% in quarter X.
- Get X% more feedback from candidates and employees.



MARKETING AND SALES

- Increase the number of marketing qualified leads by X% in quarter X.
- Qualify sales leads more efficiently and increase their number by X%.
- Increase direct purchases through website/messaging apps by X%.

2. Consider consumer/employee expectations from chatbots

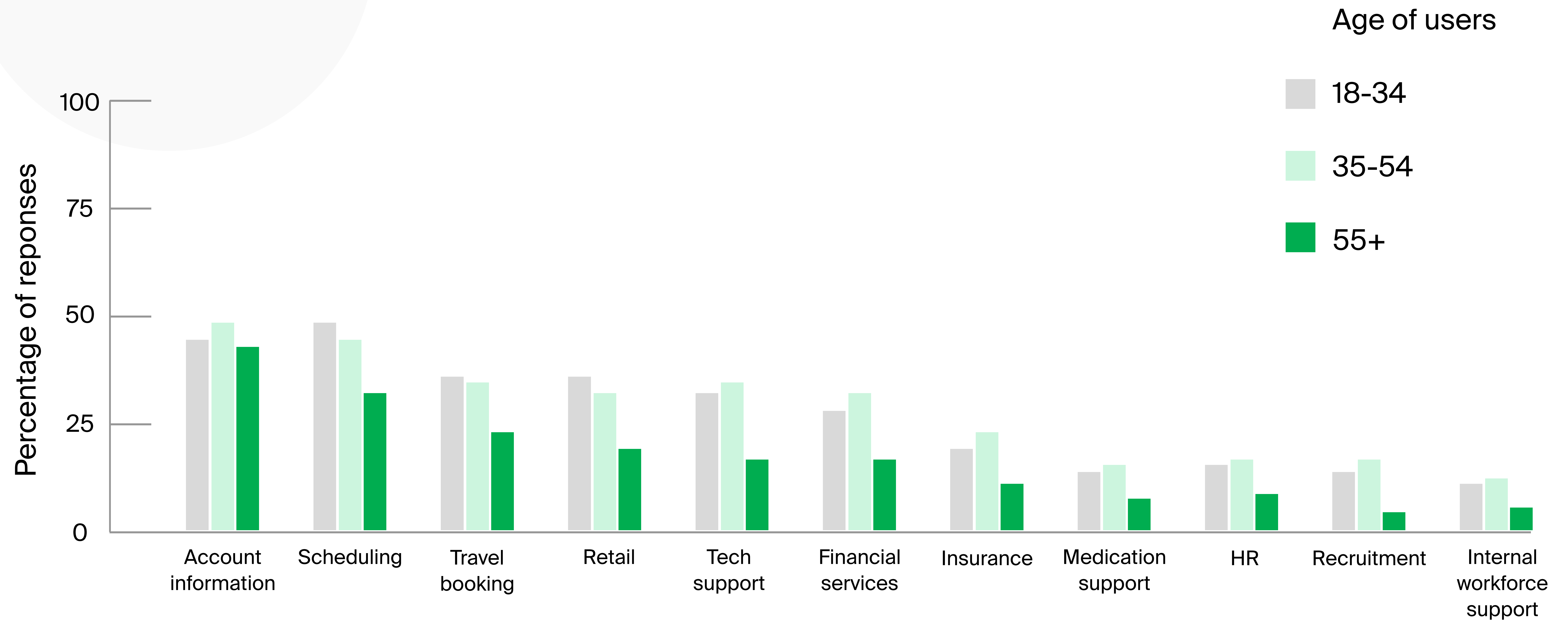
WHY IS THIS IMPORTANT?

Your customers and employees might prefer to engage with your chatbot only at certain touchpoints. By understanding their tendencies, you can develop more specific intents and better optimise its conversational workflow.

HOW TO DO IT

The best way to understand your customers' expectations is to ask them directly through online surveys or short calls. Alternatively, you can review recent analyst research to find out more about their general attitudes.

In which situations would you prefer to receive assistance from a chatbot rather than a human?

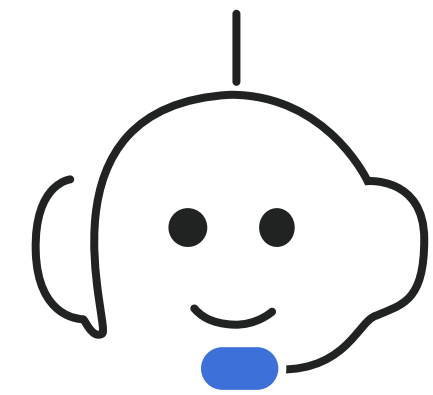


3. AI Chatbots platform considerations

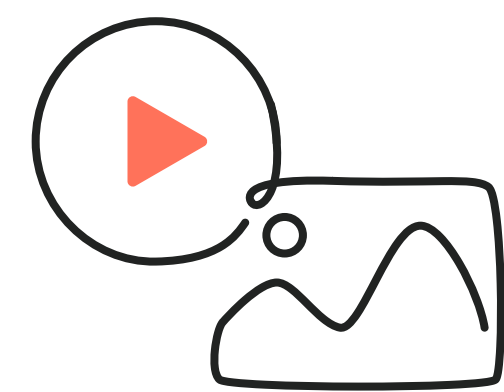
The context of your typical customer conversations will largely determine the features you need in your chatbot. If you are planning to implement a very basic conversational flow that helps you qualify customer support requests, you could choose a simple, out-of-the-box solution. For more sophisticated needs, you need a platform that provides you with flexible flow-building capabilities and intelligent features so that your chatbot can self-learn based on its conversations.

Similarly, if you are catering for an international audience, multi-language support should be a key feature to look for. You would probably need to build a library of intents separately in each language, but your vendor may already have some pre-built resources to help you.

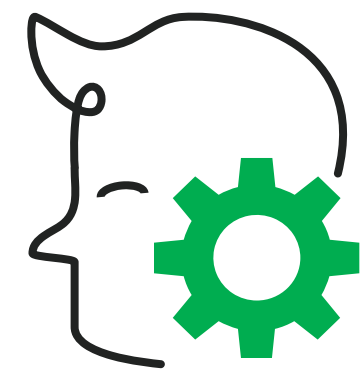
WHAT TO CONSIDER?



Single or multi-purpose chatbots



Cross-channel deployment



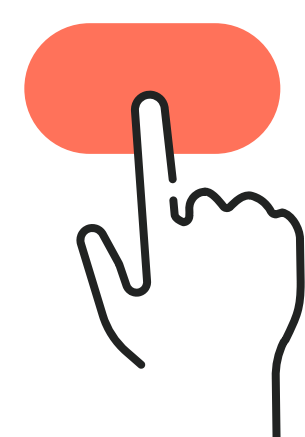
Natural Language Understanding (NLU)



Third party integrations



Multi-language needs



Training the bot

WHY CONSIDER IT?

Solutions built for a specific use case help you solve only the simplest issues. Multi-purpose chatbots can better adapt to your use case and deliver greater value long term.

71% of people are willing to use messaging apps to get customer assistance. Take your consumers' preferences into account when deciding where to deploy your AI chatbot.

NLU chatbots rely on Machine Learning (ML) to continually enhance conversational efficiency and be able to self-resolve a greater number of issues without pre-defined scripts or scenarios.

Easily connect your platform to your CRM and other enterprise systems to ensure data consistency across multiple departments and customer touchpoints.

Businesses that cater for diverse geographical audiences and have multi-language call centres, should prioritise solutions that provide multi-language support.

When selecting your NLU chatbot it is essential to ask your vendor to provide pre-trained models for your specific use case. They should be able to provide assistance at every step of the training process.

AI Chatbot Implementation Steps

Once you have defined your conversational AI goals, considered customers' expectations, and selected your solution, you can start setting up your AI chatbot. Your vendor's support is critical in this stage as you might need assistance in configuring and training your chatbot.

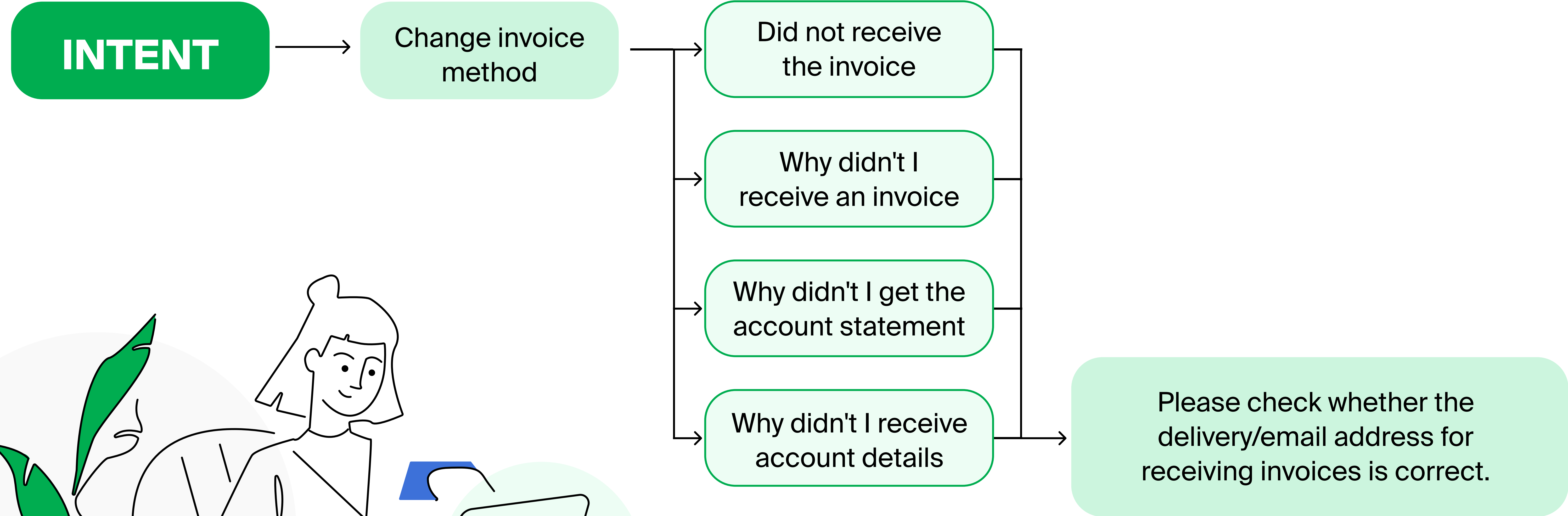
Step 1: Define intents

WHY IS THIS IMPORTANT?

Precisely defined customer intents are critical to ensuring an AI chatbot's efficiency. They enable the bot to successfully recognise customers' queries regardless of how they are formulated and provide the best possible answer.

HOW TO DO IT

Based on the historic data from your existing customer communication systems and your agents' experiences, you should define common journey maps. Below is an example of a customer intent in finance.



Step 2: Brand and personalise







WHY IS THIS IMPORTANT?

Branding your AI chatbot is an essential step to integrating it as part of your business identity. This will also help you ensure positive and memorable customer experiences.

HOW TO DO IT?

Define the basic info and personality traits of your chatbot persona. This will be a foundation for creating conversational flows and tailoring its messages to better fit customer expectations. There has been very extensive research done on chatbot personalities and this may help you select the traits for yours.

CHATBOT MOLLY

INFO		TRAITS
<p>Name: Molly</p> <p>Age: 27</p> <p>Role: eStore virtual assistant</p> <p>Purpose: Provide shopping assistance</p> <p>Passion: Make customers happy</p>	 <div></div>	<p>Tone: Friendly/neutral/formal</p> <p>Approach: Chatty/helpful/humorous/ enthusiastic/intelligent</p> <p>Attitude: Warm/detached/energetic/ informative/useful</p>

Step 3: Define transfer rules

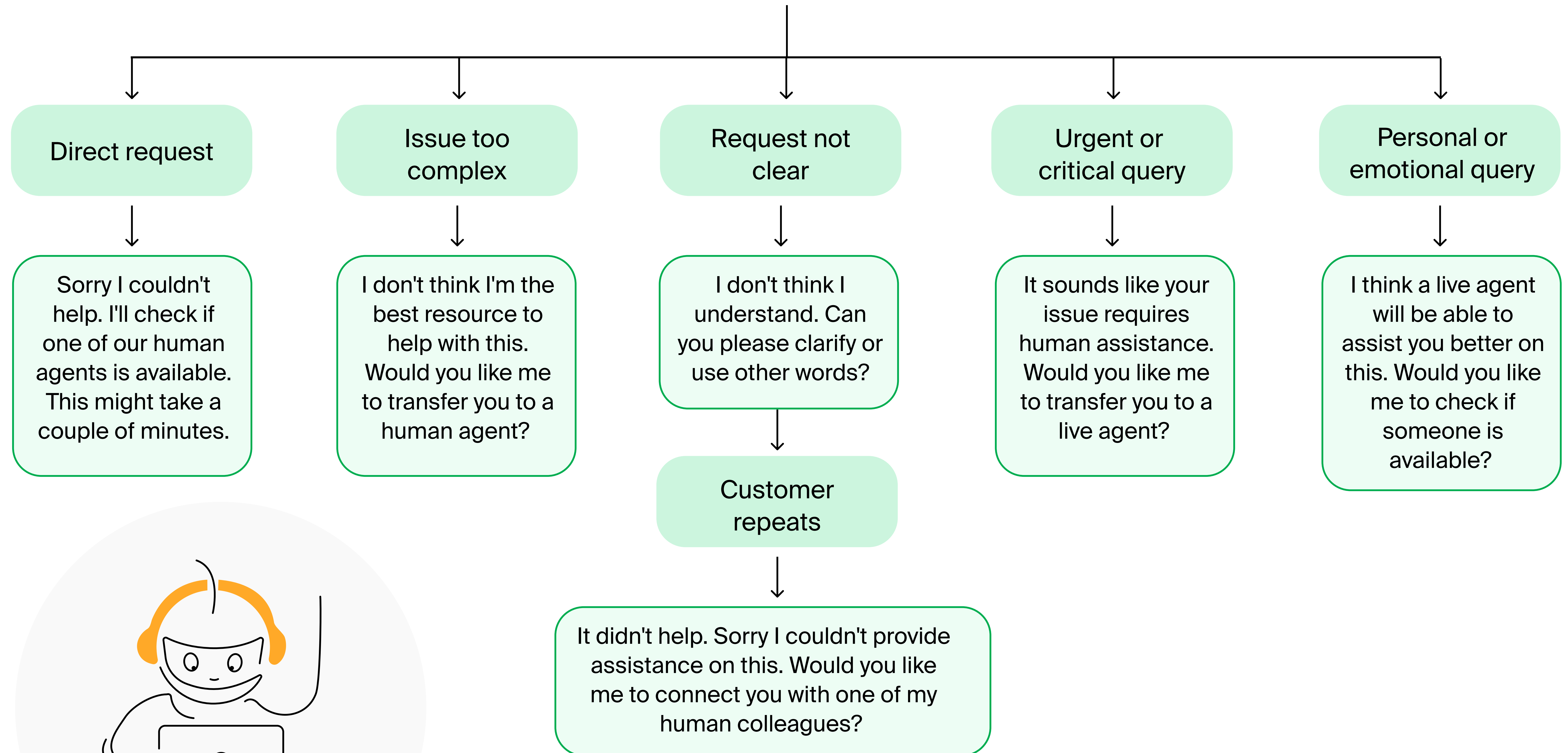
WHY IS THIS IMPORTANT?

Your customers will always have queries that are too complex, too sensitive, and too urgent for AI chatbots. As part of your intent creation step, you should also define at which points customers are most likely to require human agents and define transfer rules.

HOW TO DO IT?

Ask your team to create a list of situations in which human assistance is critical. Make sure you define it as a separate intent in your strategy and provide an easy option for the customer to get access to a human agent or offer it as an option in the opening dialogue.

TRANSFER SCENARIOS



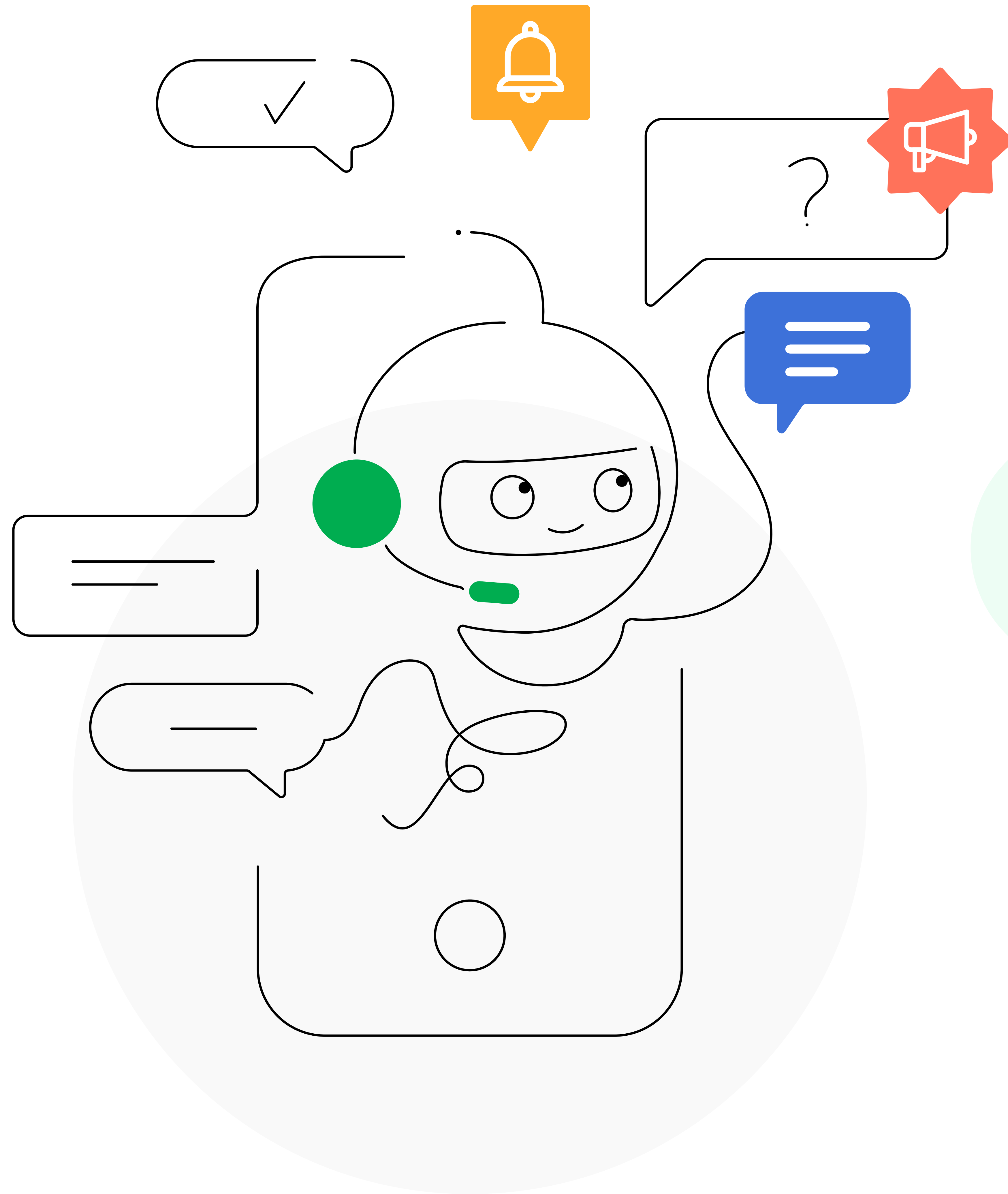
Step 4: Train your team

WHY IS THIS IMPORTANT?

The hybrid approach to customer conversations is likely to change many internal workflows, whether you use AI chatbots for customer support, HR or marketing and sales. Train your teams to ensure they can collaborate efficiently with their automated assistant.

HOW TO DO IT?

Once your initial AI chatbot implementation plan is approved, make sure you communicate it to all the teams involved. Even before the solution is set up and tested, you can schedule weekly or bi-weekly cadence with your teams to discuss the changes it will bring.



AS PART OF YOUR TRAINING, YOU SHOULD:

- Outline relevant implementation timelines
- Introduce the chatbot's personality
- Share intent and training data with your team
- Identify transfer scenarios
- Develop guides on handling transfers
- Simulate exercises once the bot is deployed in test

Step 5:

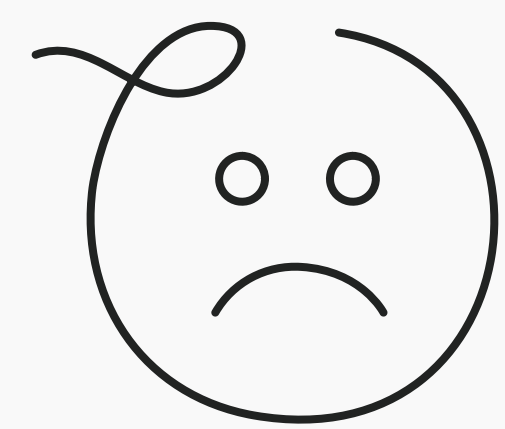
WHY IS THIS IMPORTANT?

Every customer conversation can give you valuable insights into relevant behavioural patterns and the most common requests. This knowledge helps you further improve your chatbots and drive better business results.

HOW TO DO IT?

When choosing your chatbot platform, ensure that you get access to all conversational analytics. Work with your vendor to understand how you can efficiently apply these insights and provide weekly or monthly reports so that improvements can be identified and made early on.

INDICATORS

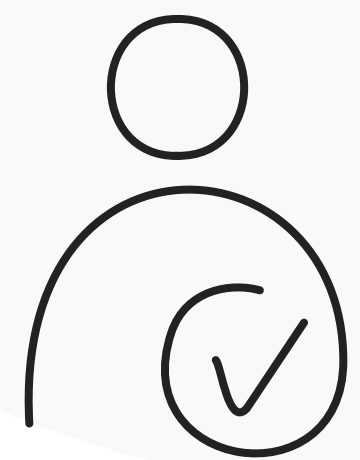


AI chatbot frequently fails to solve similar user requests



STEP FOR IMPROVEMENT

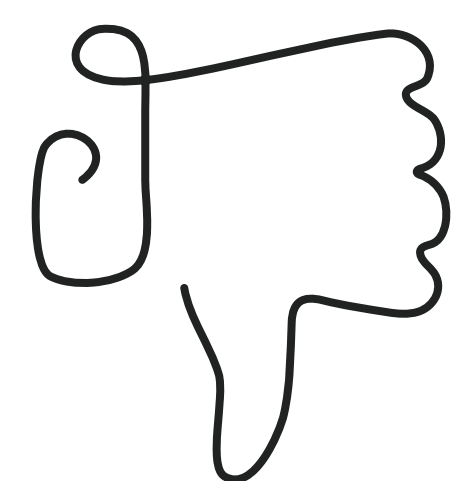
Improve intent data and create alternative paths



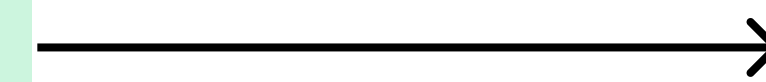
Customers often request agent transfers



Analyse conversations to check which messages triggered the reaction



Customers are getting frustrated because they cannot immediately access an agent



Offer a “Chat with an agent” option at the start of the dialogue

GMS Chatbot Development Process

Proof of Concept

Solution architecture design / Evaluating additional features / Preparing terms of reference



Project Specification

Data preparation

Data clustering / Forming NLU training samples / Preparing dictionaries



Training samples

Dialogue scenario design

Drawing architecture / Preparing bot scripts / Considering integrations



Conversational tree

Integrations setup

Bot placements in designated channels / Analytics setup / Integration with communication tree



Integrations

Creative and copywriting

Corporate small-talk creation in brand voice / Copywriting answers in brand voice



Bot personality

Testing and debug

Testing recognition quality / Integrations and conversational scenarios



Ready-to-work bot

Analytics and additional training

Transition from development to support / Analysing communication performance / Expanding functionality



Skilled chatbot

Conclusions

The **more effort you invest in planning your chatbot implementation project**, the better results you will achieve.

By setting clear goals, choosing the right AI chatbot solution and carefully following deployment best practices, you can turn your AI chatbot into a powerful customer engagement and interaction tool. This will enable you to reap its full benefits such as lower call centre costs, faster ticket resolution times, improved efficiency, higher customer and employee engagements, as well as enhanced sales and marketing results.



Global Message Services (GMS)
is the trusted communications
service provider for Enterprises
and Mobile Operators worldwide.

We bring the mobile messaging ecosystem together
by providing a single access point for messaging
traffic exchange between enterprises and mobile
operators. You can find out more about
our CPaaS Enterprise solution [here](#).

www.gms-worldwide.com

Choose Progress



SHARE THIS EBOOK  