

eBOOK

AI Chatbots Implementation Plan

Key considerations
and setup steps



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



01 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 Bewerber
und Mitarbeitern



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%

02 Consider consumer/employee expectations from chatbots

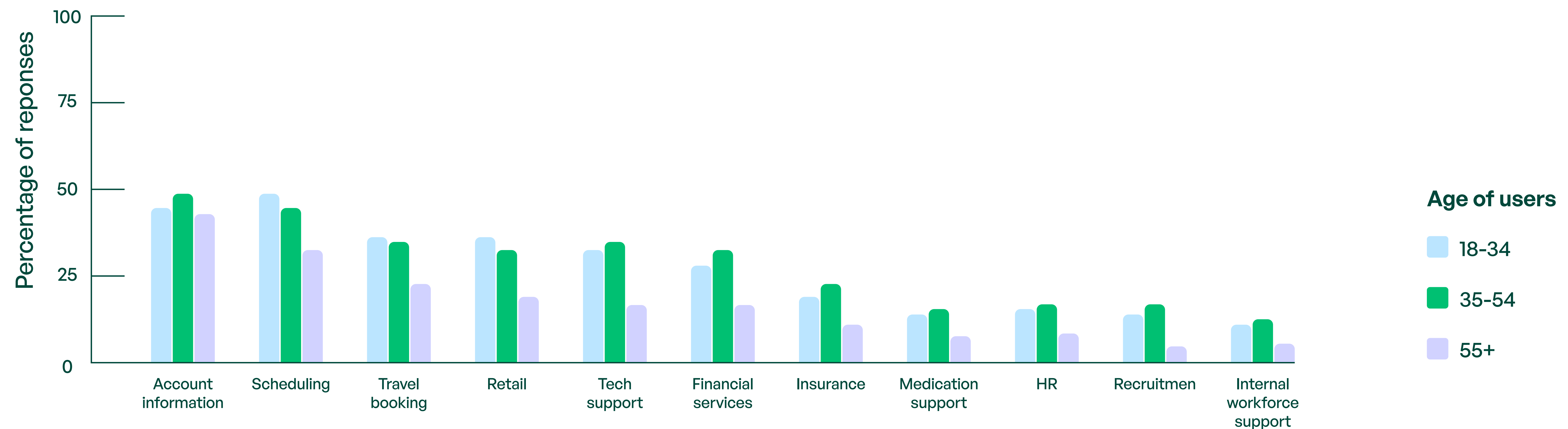
Why is this important?

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

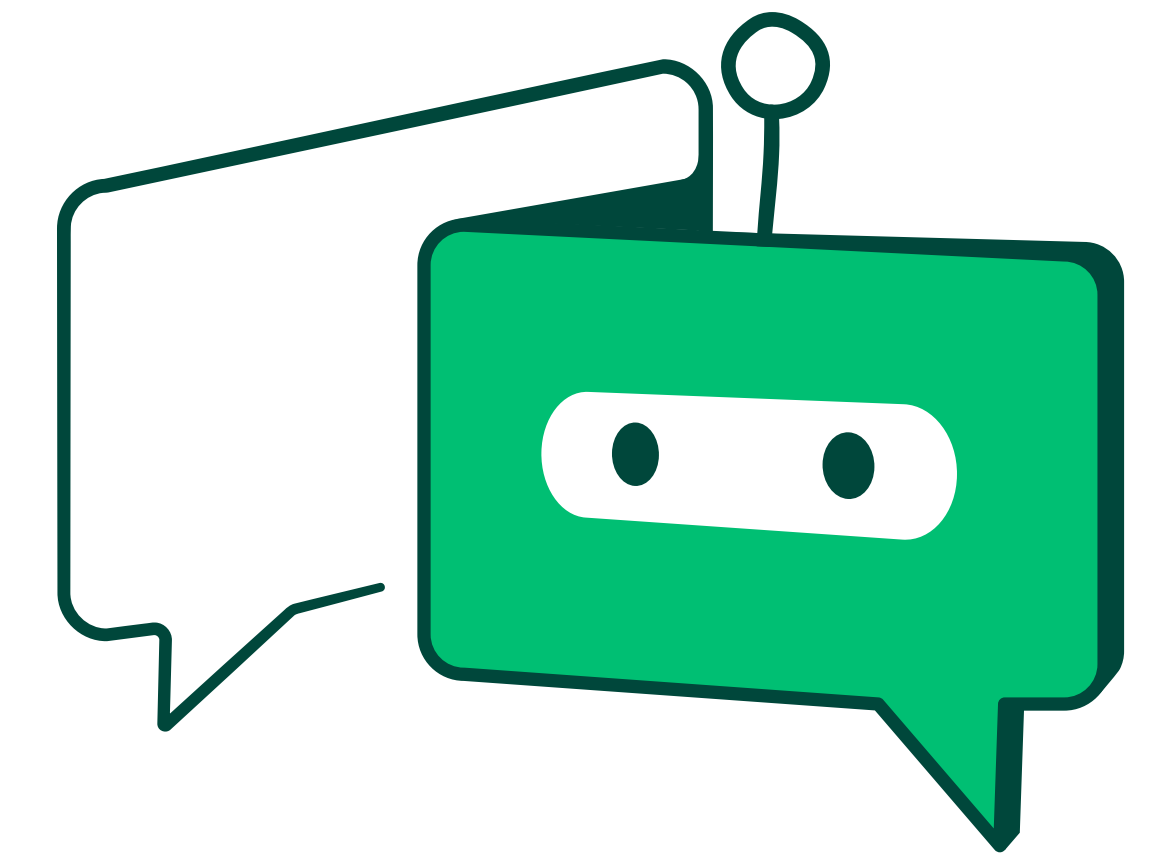
The best way to understand your customers' expectations is to ask them directly through online surveys or short calls. Alternatively, you can review recent analyst research to find out more about their general attitudes.

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



03

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

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.

Cross-channel deployment

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.

Natural Language Understanding (NLU)

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.

Third party integrations

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

Multi-language needs

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

Training the bot

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

Why consider it?

AI Chatbot Implementation Steps

Step 1: Define intents

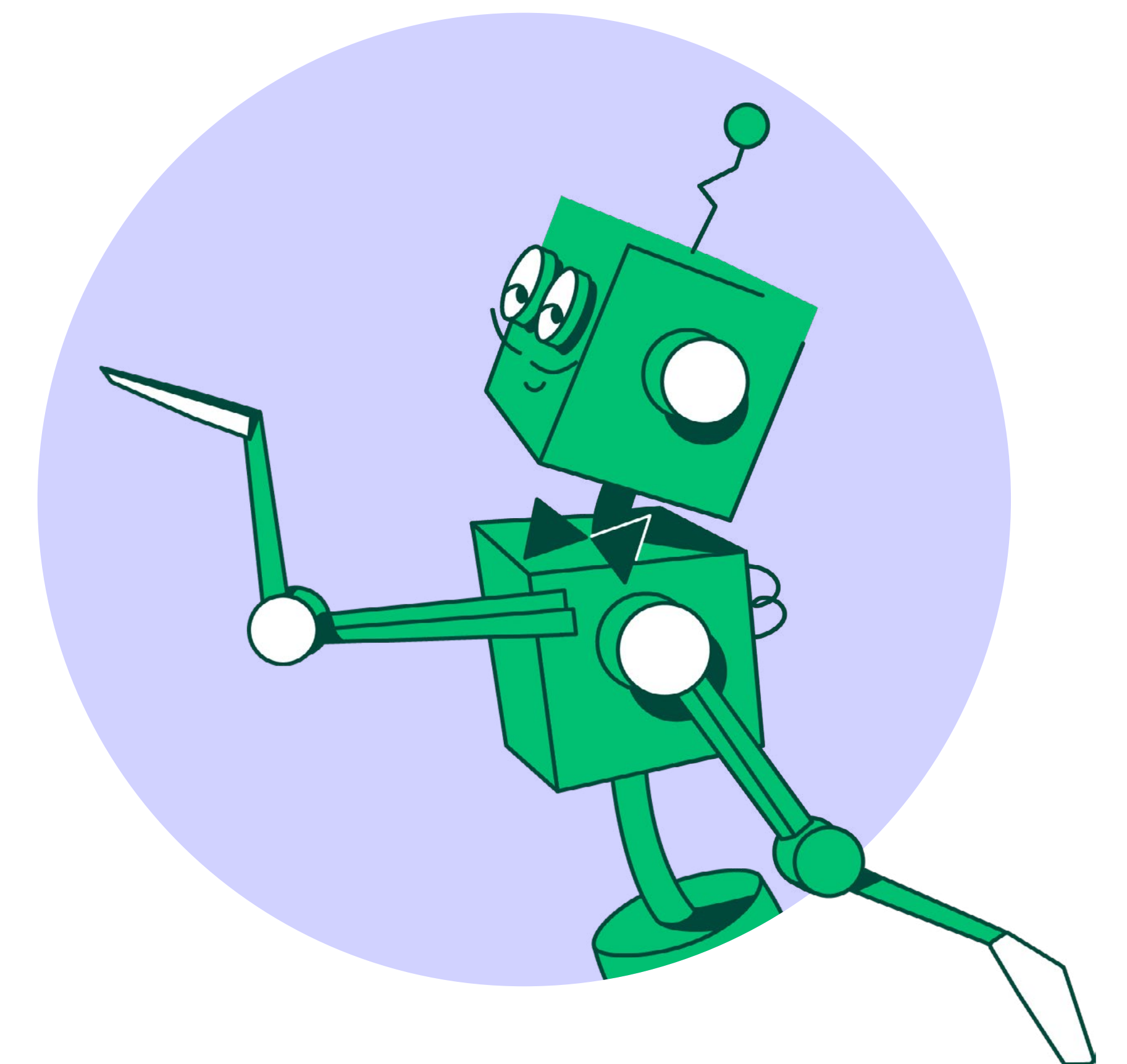
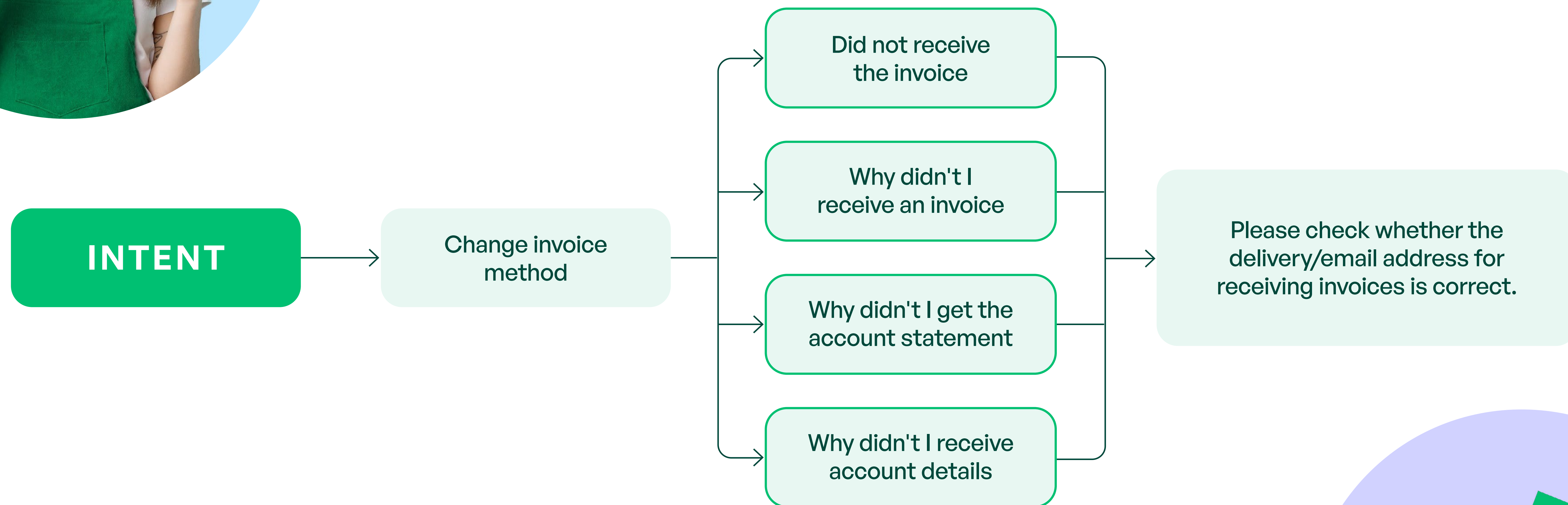
Why is this important?

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.

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.

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.



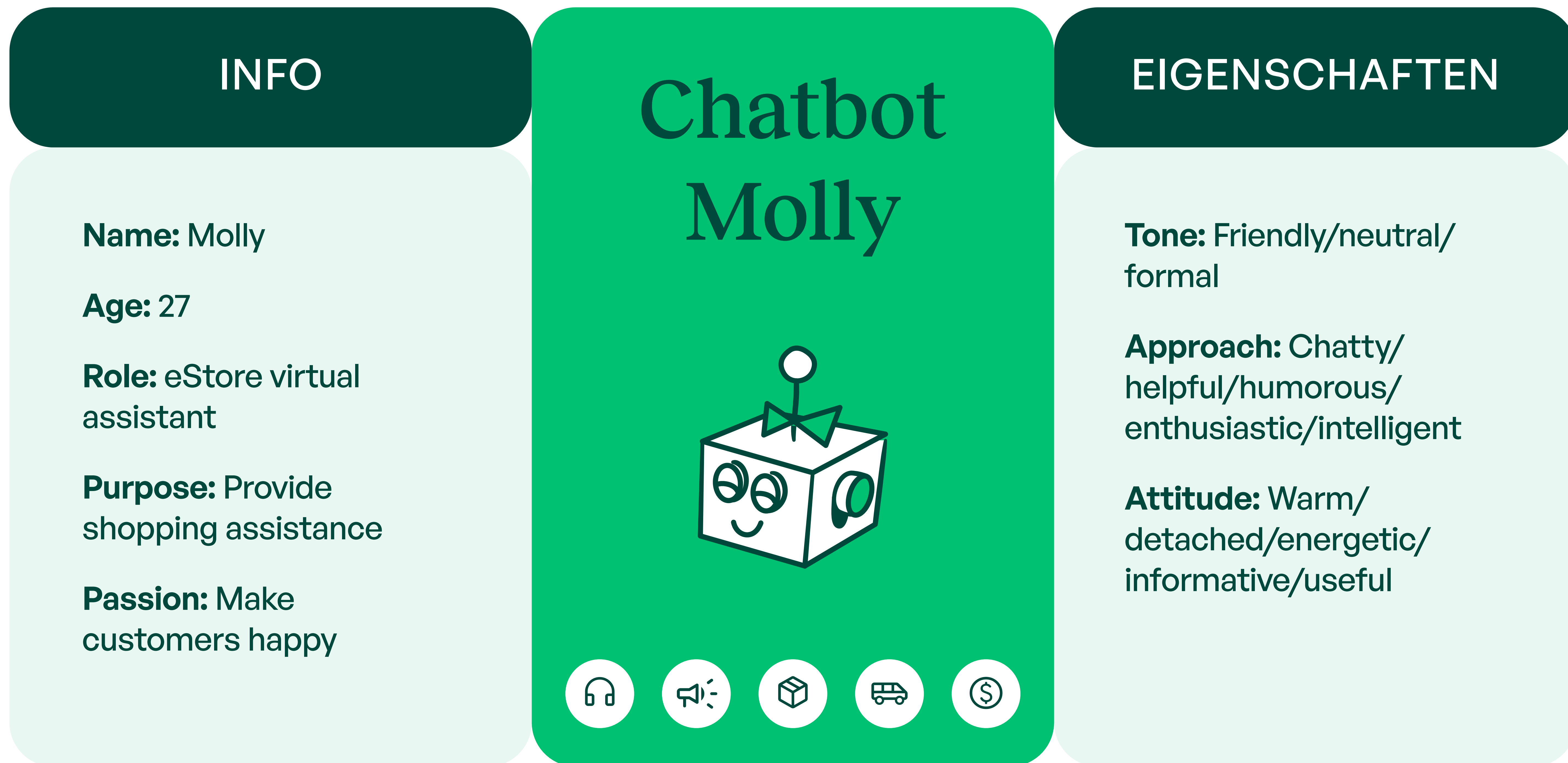
Step 2: Brand and personalise

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.



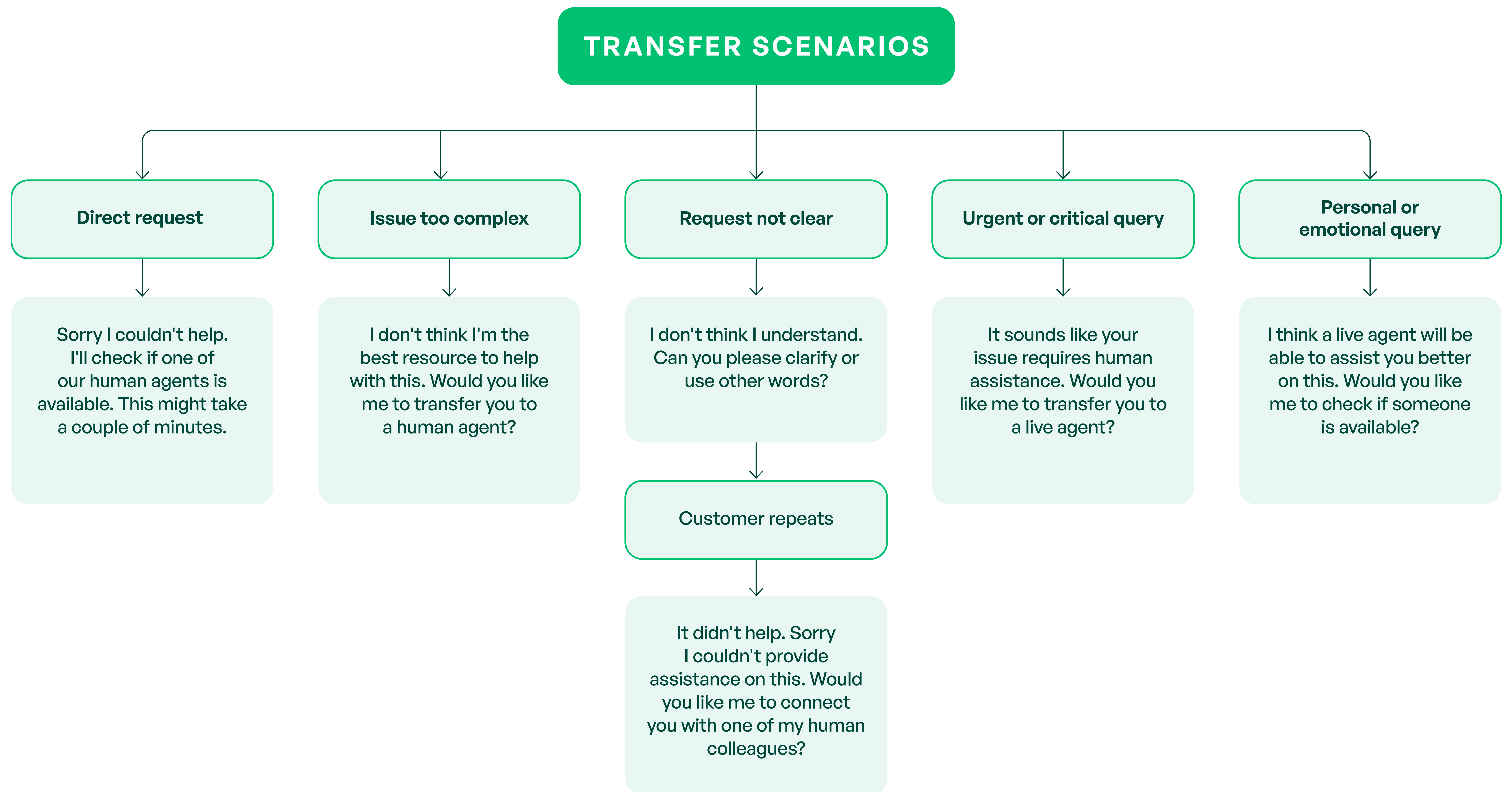
Step 3: Define transfer rules

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.



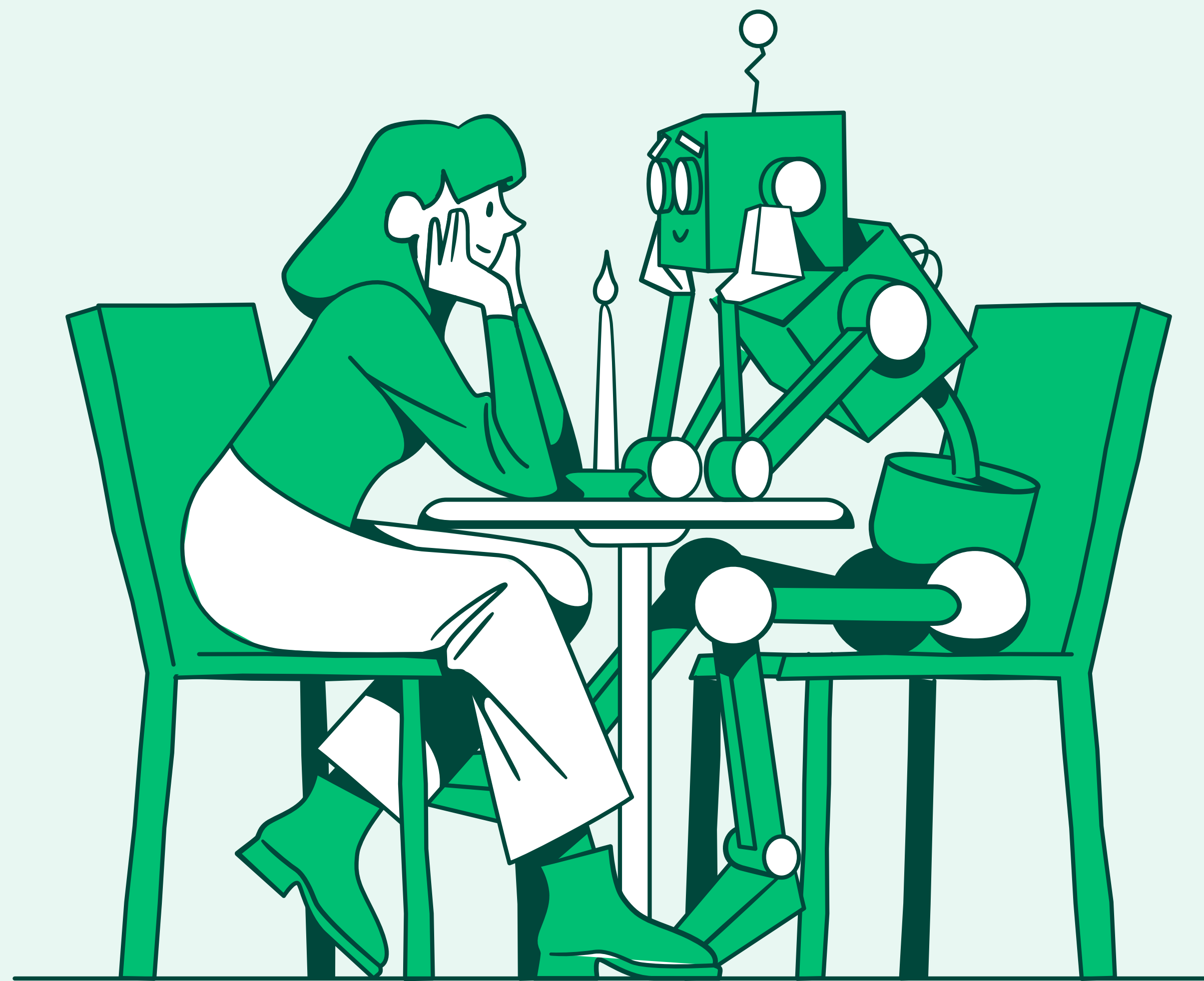
Step 4: Train your team

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 timeline
- Introduce the chatbot's personalit
- Share intent and training data with your team
- Identify transfer scenario
- Develop guides on handling transfer
- Simulate exercises once the bot is deployed in test

Step 5: Analyze performance

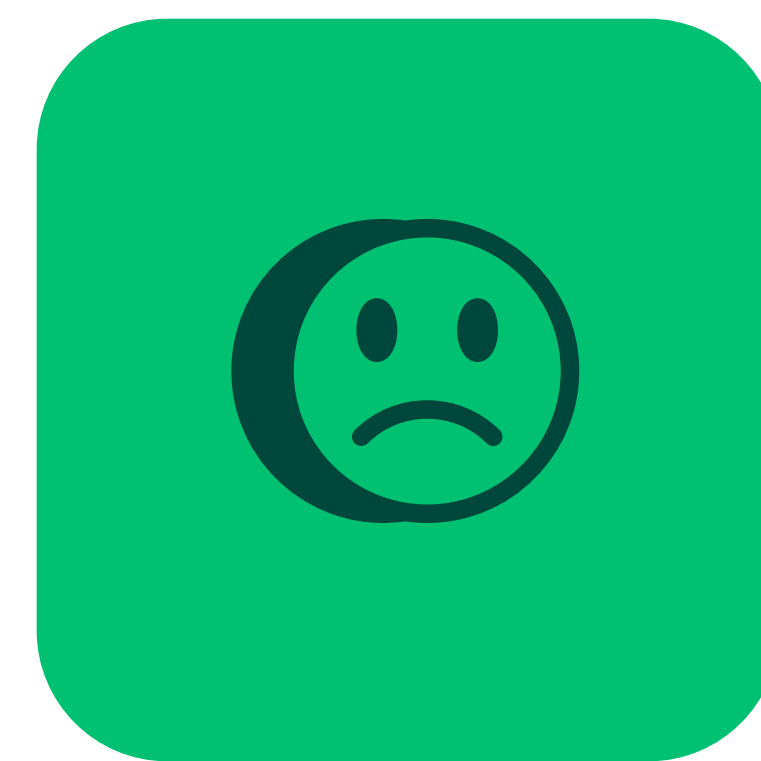
Why is this important?

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

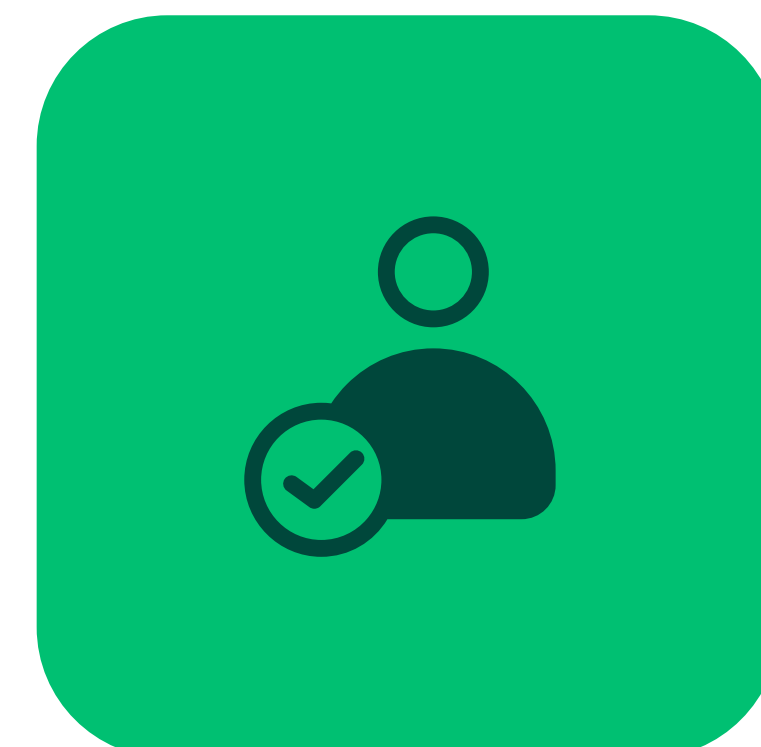


AI chatbot frequently fails to solve similar user requests



Step For Improvement

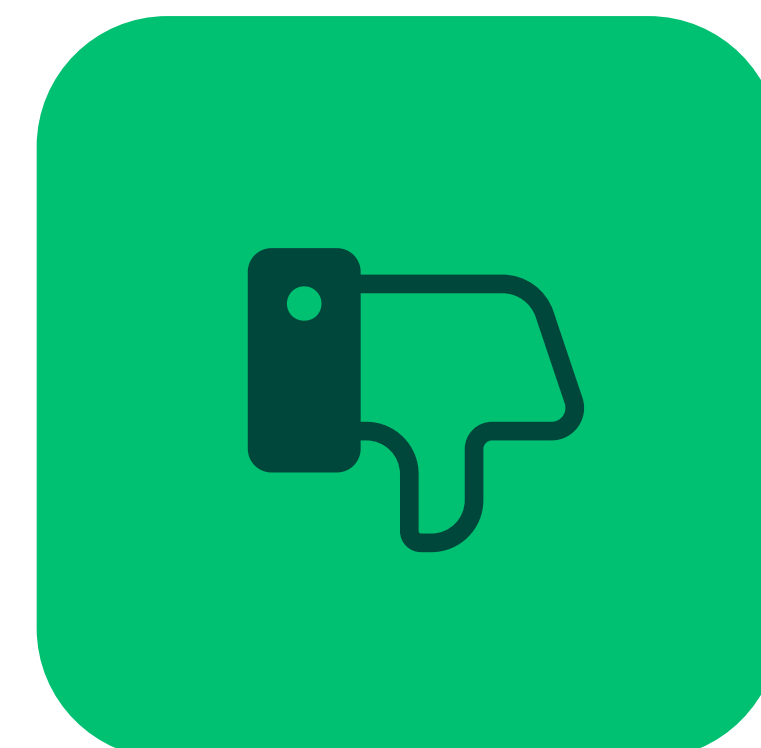
Improve intent data and create alternative paths



Customers often request agent transfers



Analyse conversations to check which messages triggered the reaction

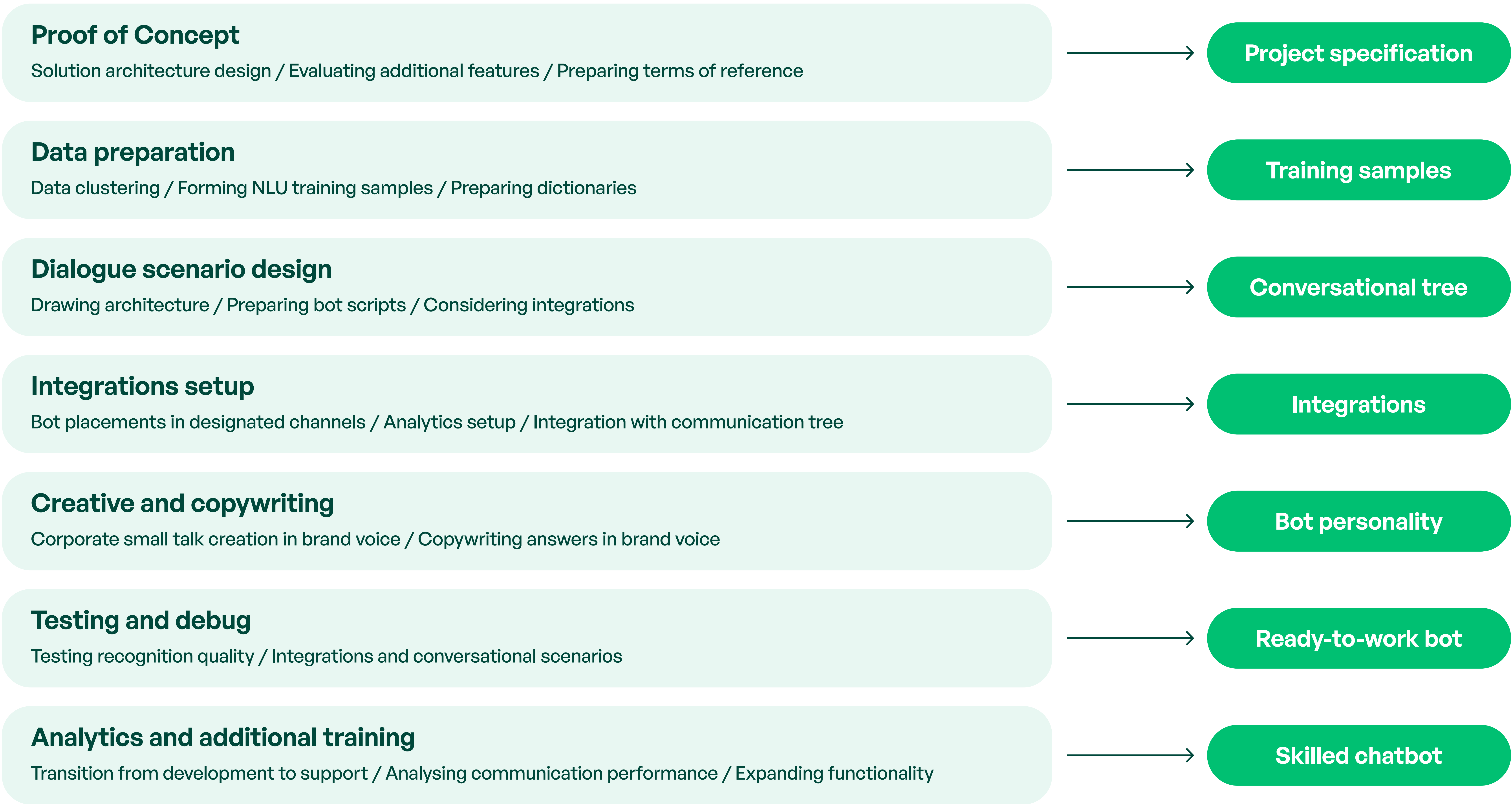


Customers are getting frustrated because they cannot immediately access an agent



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

GMS Chatbot Development Process



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.



ABOUT GMS

GMS is at the forefront of global communications solutions, empowering our partners to bring true value into every conversation.

Working hand-in-hand, we identify opportunities for growth and create secure and engaging AI-driven solutions that build trust between brands and their audiences to enable next-generation customer experiences.

For almost 20 years, our track record of excellence is a testament to our expertise in the world of communication. It speaks to our integrity, agility, and commitment to our partners' enduring success.

That's why we are the strategic partner of choice, helping world-class enterprises Greenlight Tomorrow.

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