

How to Launch Your First Chatbot Project

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Introduction

Chat has quickly become a standard communication channel and basic customer expectation across most industries. Chatbots and live chat are both two sides of the same coin, playing an important role in service and business strategy. Bots offer a multitude of opportunities for increasing automation and speed while reducing service costs and workload.

Though initially focused on customer service, many of the use cases and capabilities span multiple departments and can offer similar benefits in both internal and external scenarios. Human Resources for example, receives a wide range of service inquiries whether externally from job applicants or internally from employees. Marketing and sales can capture and qualify leads while your IT service desk can benefit from deflected tickets, more self-service and a lower cost to serve.

This Smart Guide will serve as a blueprint for building and launching your chatbot project, from conception and design through implementation and expansion elsewhere in your organization.

Whether you already have one or several existing chatbots or a complete beginner, we'll guide you step by step so that you save time, cover all your bases and plan a successful bot project.

Goal and ROI for Your Chatbot

Many companies make the mistake of implementing a chatbot for its own sake. This may be due to internal pressure to add new channels, wanting to position themselves as innovative or keeping up with the competition. Deploying new software without understanding the technology and its benefits is the wrong approach.

Instead, you should take a goal-based approach, focused first on the challenges you have and goals you want to achieve, independent of the technology. Avoid empty phrases like “being innovative” or “offering omnichannel service” and ask yourself what added value or specific business outcomes a new chatbot

will bring. That may be 24/7 service availability, reduced workload for agents or additional cross-selling and upselling opportunities. Once you have the answers, you can begin to evaluate the ROI and decide whether a chatbot is actually the best solution.

An ROI calculation for customer service may look like this:

Service Metrics	Implementation Effort	Possible workload reduction
• Number of service requests • Average handling time • Cost to serve	• Content creation and formatting • Moderation • Maintenance	• 10% Bot usage • 20% Bot usage • 50% Bot usage

→ **Is a new bot cost-effective and will it accomplish your project goals?**

Chatbots can deliver value and help increase automation across organizations, beyond just customer service. In HR, for example, they can automate both internal and external work such as handling job applications, answering frequent questions from applicants and alerting them of status changes. Internally, they can help schedule days off, submit sick notes, answer common questions and more, all reducing staff workload. In your IT department, they reduce tickets by handling common inquiries and even

carrying out simple fixes and tasks themselves. In marketing, a chatbot can help generate and qualify leads.

Defining the goal and evaluating the ROI can seem a bit complex at first. We recommend working in a cross-functional project team to ensure that new thoughts and perspectives find their way into your project planning.

Defining Your Chatbot Use Case

Once you've decided a chatbot is the right choice, it's time to define and decide which use cases it should support. Many companies skip this step leading to wasted effort during implementation and additional work down the road.

The most common reasons for this are unclear use cases, only defined in a sentence or two as well as the misconception that chatbots can be a do-it-all solution to every challenge they face. This is wrong.



Define your Use Cases in 4 Steps:

01 | Use your ROI calculations to select the scenarios with the most potential for savings and automation. Examples may include FAQs, password resets and other simple, yet frequent issues.

02 | Identify the stakeholders in the situations above and in coordination with them, ensure that a chatbot could effectively replace your human resources in these situations.

03 | Decide whether the use cases in questions would be better handled by a bot or an alternative such as web-based self-service for example. What concrete advantages does a chatbot have compared to the alternatives?

04 | Organize and group your scenarios together and build your use case description for each group.

After defining your use cases, we highly recommend testing a bot internally in some, or all of your scenarios to further refine it and discover any other challenges or pain points you may have missed. As they say, no plan survives first contact with reality so be open to data or experiences that do not support your intended use case and rethinking your plan if required.

Importantly, do not think of your use case as complete until after going into production. Be open to ongoing optimization. Once your team has clearly recognized and identified the benefits, then you have a clear framework to build on as you further develop the bot in the future. This enables you to base future decisions on it and more easily decide whether new ideas fit into your framework and should be implemented.

Choosing The Right Technology

Once your use cases are clear and you have a general framework for the future, it's time to select the appropriate technology to support them. Having an exact description of the goals and use cases is helpful to define the technical requirements for your bot. Let's look at an example company.

Acme Bank Inc.

Goal

We want to offer our customers a 24/7 communication channel in customer service.

Requirements

- 24/7: Chatbot technology should be reliable and always available.
- Communication: The chatbot should be capable of dialog and offer the ability to send push notifications.
- Customer service: The chatbot should be designed for classic service use-cases by default or have strong customer references in the service industry.

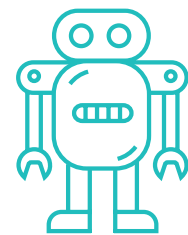
Use case

We want to make it possible for customers to get assistance quickly and easily about online banking. The escalation point is a referral to the nearest branch.

- Fast and easy: To offer added value here compared to a FAQ list, the chatbot should be able to interactively guide the user to the right solution.
- Integrations: Can the bot be integrated into a portal and engage with customers based on context?
- Content maintenance: How much effort is required to maintain content?
- Branch escalation point: The chatbot should be able to list the nearest branches, i.e. integrate a branch finder

If anything still appears unclear, don't worry. Once you begin evaluating technology vendors, it will become much clear which ones can meet your requirements.

Aside from the technology itself though, it is critical to understand the vendor's approach and support. Some provide a complex framework on which to build your own tailor-made bot, leaving a huge amount of development work to the customer while others take care of setup, maintenance and all future changes leaving you little flexibility and higher long-term costs. Neither extreme is advisable. Strong support during the conception and implementation phases is a must-have as is ongoing support when necessary. However, the provider should educate and empower you to easily maintain the technology yourself in the long-term and not leave your hands tied.



Start Small But Think Big – The Path to a Bot Platform

As noted, it is important to limit the initial scope of a chatbot to a specific use case. Once successful, you can quickly pursue additional use cases based on your previous planning and experience.

In order to keep the maintenance effort of your first chatbot reasonable, you should not try to repurpose your initial bot for new use cases. Instead, it is better to build and deploy another purpose-built bot for each new use case. Just as people specialize in different roles, so too should your bots, making them easier to maintain, more effective and ultimately more successful for your company and the user.

If multiple bots sound complex, not to worry. You can still present one “bot face” to the customer using a lead or concierge bot who manages all communication with the user never knowing different. It will process

requests, identify the appropriate expert bot for the issue and relay questions and answers through it, instantaneously.

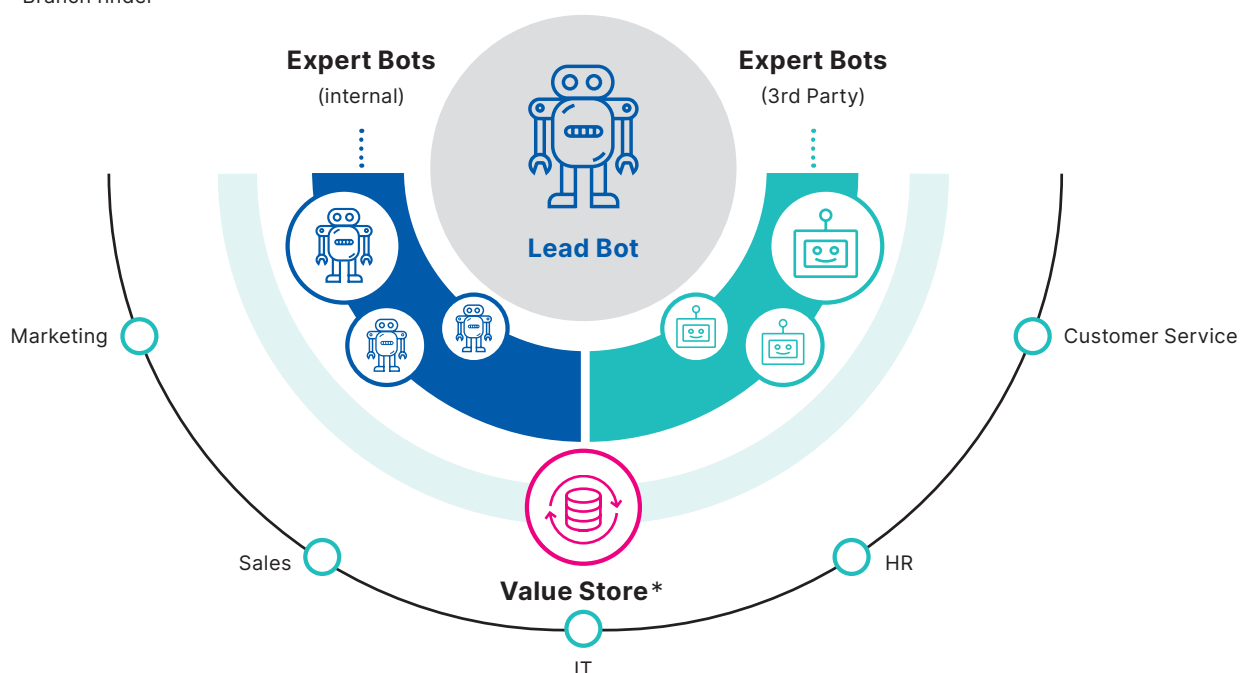
This makes it easy to launch additional bots for other departments such as customer service, IT help desk, marketing, HR or sales. You can even integrate 3rd party bots into the platform, saving the cost and effort of replacing or migrating them.

The transition from a single bot to a bot platform is actually minimal with the right technology and project team.

* Value Store:

External system integrations such as:

- CRM data
- Ticketing
- Branch finder





Building Your Project Team

To get the most value from chatbots, digitization and automation for your company, a bot project should not be viewed independently. Establish a structure for it within the larger organization. This way, your chatbot will be implemented quickly and easily, and if others should follow in the future, they will be much easier and faster to handle.

Setting up a chatbot team using four roles has proven most successful, according to the experiences of USU customers. These roles can either be assumed by four different people or managed by a single person.

01 | Bot Master

The Bot Master is the owner, driving the project and automation via bot inside the company. They maintain the strategic overview, evaluate use cases, and propose using chatbots where they make sense. In addition to securing the required infrastructure, they build the team and manage the project.

02 | Technical Admin

The Technical Admin understands the technical side of things including both the opportunities and limitations of the software. They'll setup your new chatbot, connect it to the right channels such as your website and help with deployment.

03 | Coach

The Coach designs the bot's personality and dialog creation, continuing to optimize it over time. They understand the search algorithm and concepts such as Design Patterns and Specificity. They are your point of contact for all functionality questions.

04 | Editor & Content Managers

The Editor or Content Manager is responsible for all the chatbot's content. They write the text, tailored to the bot's target group(s) and the medium (e.g. chat, voice, desktop). An editor can be from the editorial team but must be supported by subject matter experts to ensure the content is accurate and up-to-date.

Building Your Bot

Project teams are often eager to get started and begin with a list of questions and answers for the bot. However, before jumping into the actual text, it is critical to first think about the bot itself, specifically: its personality, communication style and content.

Give it personality

Since your bot may be the first and only point of contact with customers, it's important to humanize it with personality. Before you get too creative, make sure it fits both your use case and your corporate communication style. A banking bot may be more formal and designed to engender trust while in retail, you may opt for a more informal and fun communication style.

Important factors to consider:

→ Tone

Will your bot use formal or informal speech? In English grammar, we only have "you" while other languages such as Spanish, French, and German have a formal and informal version. Ensure your bot's tone matches your use case and company style as well as the culture and language the bot will work in.

→ Role

Aside from tone and personality, it is important to define what role the bot will play. Should it act as a friend, an expert or just a provider of information?

→ Name & Avatar

No one wants to speak to a robot as we all know from IVR systems. Give your chatbot a name and avatar to suit. This helps to humanize it, make a better impression on users and increases engagement and usage as well.

→ Dealing with Insults

Particularly in customer and IT service, emotions can sometimes run high. Decide in advance how your bot should deal in insults, complaints and rude comments. Will they ignored, responded to, or even escalated to live chat?

The topics a chatbot covers are also an important part of its personality as are the escalation points to live chat. Creating a well thought out profile for your bot in advance is useful for the person serving in the bot coach role.

Match your communication style to the format

The heart of any chatbot is content. It should be written from the user's perspective, avoiding assumptions that editors and internal writers often make because they are already so familiar with the company and products or issues.

In addition, remember that communication is done via a small chat window, meaning the bot's dialog should be short and to the point. Using full articles out of your knowledge base is thus a no-go. Instead, create shorter versions of the same information better suited to the bot. When possible, the bot can use clickable responses for example, when asking what type of mobile device is being used. This makes the user response faster, saves typing and ensures consistent input making it easier to understand. You may connect it to your CRM, marketing automation tool or ticketing system so that users can get the maximum value from it, versus having to switch to sending an email or filling out a form elsewhere.



Ensure content is format appropriate but also accurate and current

As with service agents, a chatbot is only as good as the information it can deliver. In addition to format appropriate responses and text, the quality and accuracy of support information is key. This is where your editors and content managers come into play.

To ensure your content remains up to date, make sure the editorial backend is easy to use and provides the tools necessary for regular maintenance. This includes a WYSIWG editor, prebuilt dialogs, and templates as

well as automated workflows for creating, reviewing and publishing content. This is especially important as people often have multiple roles and editing may not be a full-time position.

Considering ending the chats with a quick survey, even if a simple Yes/No as to whether it was helpful. Customers feel heard and your team can gather additional feedback for optimization potential.

Project Roadmap

Everything you've learned so far can be summarized in a project roadmap. Here's how to build your chatbot in 10 easy steps.

01 | Define goals & design use cases

Before starting, you need clear goals and associated benefits. This is the only way to make your bot successful. You can also align all further steps to ensure sure that the chatbot actually delivers its added value.

02 | Select bot technology/vendor

Once you know where and how you want the chatbot to support you, it's time to find the right technology provider. After all, the technology must provide all the capabilities you need. Should the bot be capable of dialog or just simple FAQs? Who needs to be able to change content and how quickly can it be done? Do you want the option to launch multiple bots in the future? Take your time when choosing and start with the most suitable provider for you, ideally with a small proof of concept first. This will help you quickly qualify or disqualify vendors and whether they suit your use case.

03 | Build your project team

A chatbot project requires resources. In some cases one person is enough, but often it's worth building a small team using the roles defined previously.

04 | Design bot and test prototypes

Before diving into detailed content, start with a plausibility check. A simple POC can be setup in a few hours and helps prove the use case and benefits, as well as evaluate the vendor. Don't be afraid to start over at step one if necessary.

05 | Editorial templates

Review existing templates or create your own with standard phrases such as greetings, questions and so forth. Vendors will typically provide several to get you started.

06 | Create content

The content is the heart of the chatbot and determines its success and acceptance. Therefore, pay special attention to this phase and establish processes that ensure the quality and timeliness of your content.

07 | Test, test, test

Once your chatbot setup, it's time for testing. Don't ignore or rush through this phase as it's well worth putting your brand new chatbot through its paces internally on a small scale. Ideally, follow up with a second phase with a small external user group of around 100 people. They should not be involved in the project and all be familiar with the use case. This pilot phase can identify further valuable optimization opportunities before going live.

08 | Roll-out/Go-live

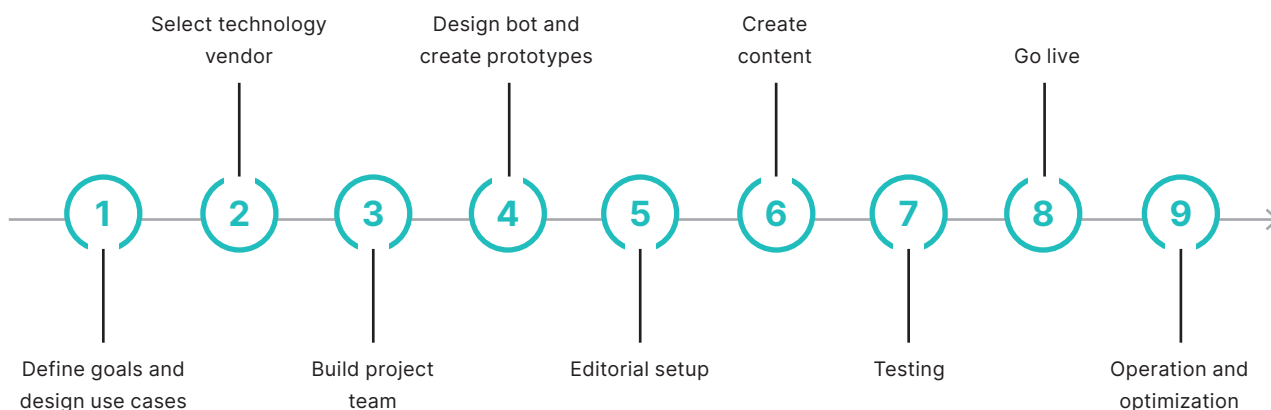
Pop the champagne, your bot is now live! Closely monitor its performance and ensure that users find it useful and engaging. Importantly, the bot should always introduce itself as a chatbot to avoid misunderstandings or the wrong expectations on the part of users.

09 | Maintenance & optimization

While many parts of the project will now be complete, a bot is never done. It must be monitored, maintained and its content regularly reviewed and updated. Begin reviewing analytics and reports to monitor performance.

10 | One bot is just the beginning – the path to a bot platform

Once your first bot has been successfully deployed and put through its paces, it's time to look at other use cases you postponed or consider new ones in other areas. From there, you'll be able to restart the process again, but with more experience!



Conclusion

Chatbot projects all follow the same general structure, regardless of use case or business area. While you will need to adjust it to suit your business and more closely reflect your needs, the importance of detailed planning, well thought-out use cases and requirements and involving all stakeholders cannot be underestimated.

By following this step-by-step approach, taking the time to create detailed use cases with all the stakeholders and testing in advance you'll ensure a smoother, faster more successful roll out.

About USU

USU sets standards in customer service. The intelligent chatbot from USU is suitable for websites, social media or voice service and every application scenario in the service area. In combination with the active knowledge management software, the chatbot enables simple structuring, maintenance, and high-quality provision of knowledge in the service area.



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